

## 2021-2022 INDEPENDENT CHARTER SCHOOL RENEWAL PETITION APPLICATION INTAKE CHECKLIST

A completed intake includes all of the following components:

Y	N	APPLICATION COMPONENTS	Comments
<b>SCOPE OF PETITION APPLICATION</b>			
		Who is the person most knowledgeable about the specific contents of the petition?	
<b>PETITION</b>			
		<b>1. Renewal petition must be in MS Word format and must include:</b> <ol style="list-style-type: none"> <li>a. <b>Title Page</b> (Will be date stamped upon acceptance of petition application for review)</li> <li>b. <b>Table of Contents</b> (Page numbers must be accurate)</li> <li>c. <b>Description of all 15 elements</b></li> </ol>	
<b>SUPPORTING DOCUMENTATION</b>			
		<b>2. Certification of Completeness with original signatures (remote intakes will allow electronic signatures)</b>	
		<b>3. Resolution of school's Governing Board (signed by Board secretary) authorizing the submission of the charter school petition application and designating the school's:</b> <ol style="list-style-type: none"> <li>a. <b>Lead Petitioner(s)</b></li> <li>b. <b>Executive Director or equivalent (if any)</b></li> <li>c. <b>Director/Principal</b></li> <li>d. <b>Onsite Financial Manager (cannot be the Director/Principal) (Must be onsite)</b></li> </ol>	
		<b>4.</b> <ol style="list-style-type: none"> <li>a. <b>Bylaws, for the nonprofit organization requesting the charter</b> (Must be current, complete, &amp; signed by Board secretary)</li> <li>b. <b>Articles of Incorporation for the nonprofit organization</b> (Must show the official seal or stamp of State of Calif.)</li> <li>c. <b>Conflict of Interest Code</b> (Must be separate document) as submitted to the Los Angeles County</li> <li>d. <b>Conflict of Interest Policy</b> (Must be separate document)</li> </ol>	
		<b>5.</b> <ol style="list-style-type: none"> <li>a. <b>Budget (3-year budget, including month-to-month cash flows and budget assumptions for 3 years beginning with the current year)</b> (Must be in MS Excel format, with formulas, contain no hidden cells and no links to external files, and not be password protected)</li> <li>b. <b>Fiscal Policies and Procedures</b> (Most current fiscal policies and procedures, and the school's Governing Board meeting minutes that reflect the approval of the current fiscal policies and procedures. The school's Governing Board approval of the current fiscal policies and procedures must occur in the school year in which the school's current charter expires [i.e., the renewal year] or in the last quarter of the prior year)</li> <li>c. <b>Documentation Relating to Grants and/or Financing</b> (All signed and executed agreements, including documentation of any terms and conditions, if the budget includes any grant(s), loan(s) or line(s) of credit with any third party lender(s), bridge financing, intraorganizational loan(s)/borrowing, and/or factoring of receivables as a source of funds)</li> </ol>	
		<b>6.</b> <ol style="list-style-type: none"> <li>a. <b>Lottery form for use in the first year of the renewal charter term</b> (Must be in a single Microsoft Word document, not PDF) (English and any other dominant language)</li> <li>b. <b>Enrollment form for the first year of the renewal term</b></li> </ol>	
		<b>7. Resumes and Due Diligence Questionnaire and Acknowledgement Forms, completed and with original signatures (no copies) (remote intake will allow electronic signatures) for: Executive Director (if applicable), Director/Principal, and Onsite Financial Manager (cannot be the Director/Principal) [Use grid on reverse side.]</b> Note: Double check that names correspond to the names identified in the Board Resolution (#2 above). Note: Check each <i>Due Diligence Questionnaire and Acknowledgement Form</i> to make sure all questions are filled out. Note: Resumes must include contact information, education, experience (including paid and volunteer) and relevant memberships and skills for the last 10 years. Please see separate "Resumes" guide for additional information on resume requirements. Note: Due Diligence forms will be transferred through a secure network	
		<b>8. Resumes and Governing Board Member Questionnaires for all Governing Board Members</b> Note: See resume requirements above. Note: Each Board Member must answer all questions, initial each page, and sign at the end of the Questionnaire. N/A or equivalent is not an acceptable response to any item. Questionnaires need to have been completed and signed within 12 months of the date of petition submission.	
		<b>9. English Learner Master Plan for the use in the first year of the charter term.</b> Note: Required only if the school has not adopted/will not adopt the District's Master Plan for English Learners and Standard English Learners. If the school plans to adopt the District's Master Plan for English Learners and Standard English Learners submit a single page indicating such in Tab 9.	

10.	Type of Site (private or District property) _____ Capacity in Current Charter _____ Capacity in Renewal Charter _____ Current Enrollment (at time of submission) _____	
11.	Does the projected enrollment in the enrollment rollout plan match that in the budget submitted with the petition?  Does the enrollment numbers (year 1 and enrollment capacity) in the "General Information" chart found at the beginning of Element 1 of the petition match the enrollment rollout plan (year 1 and year 5)?	
12.	Does the renewal petition application include provisions that require a separate request for material revision? If yes, then reschedule intake so that the petition and the material revision can be separated and processed as two distinct proposed Board actions, per the provisions of the LAUSD Policy and Procedures for Charter Schools (August 11, 2020).	

**Note: Please do *not* include appendices, including handbooks and health, safety, and emergency plans.**

**CSD INTERNAL PURPOSES ONLY**

<b>Intake conducted by:</b>		<b>Date of Submission</b>
<b>Outcome:</b>	<input type="checkbox"/> Complete petition application - accepted for review <input type="checkbox"/> Incomplete petition application - not accepted for review	

To be used for recording documentation regarding Lead Petitioner(s), Principal/Director, Executive Director/CEO (if applicable), and Onsite Financial Manager:

Name and Title	Résumé?	Due Diligence Questionnaire?

To be used for recording documentation regarding Governing Board members:

Name	Resume?	Bd. Member Questionnaire?	Name	Resume?	Bd. Member Questionnaire?

**Please note: For remote intakes, the petitioner will work with the assigned Specialist and all information will be submitted through the assigned Dropbox folder, with the exception of the Due Diligence Questionnaire and Acknowledgement forms which will be transferred through a secure server.**