

UKIAH UNIFIED SCHOOL DISTRICT CHARTER SCHOOL MATRIX

Tree of Life Charter School

2020 - 2025

Initial Charter Petition

Annual Performance Audit

Charter Renewal **X**

REQUIRED PETITION SIGNATURES IF CONVERSION OF EXISTING PUBLIC SCHOOL (Education Code 47605(a))

• 50% of permanent status teachers of school to be converted, in the form required by law	Yes	No	N/A
	X		X

REQUIRED PETITION SIGNATURES IF NOT CONVERSION OF EXISTING PUBLIC SCHOOL (Education Code 47605(a))

• 50% of parents/guardians of the number of age appropriate students expected to enroll for 1st year of operation, in the form required by law	Yes	No	N/A
	X		X

OR

• 50% of the number of appropriately credentialed teachers expected to be employed during 1st year of operation, in the form required by law.	Yes	No	N/A
	X		X

REQUIRED AFFIRMATIONS (Education Code 47605(d)(1))

Statement that school will be non-sectarian in its programs, admission policies, employment practices, and all other operations, will not charge tuition, and will not discriminate against any pupil on the basis of ethnicity, national origin, gender or disability	Yes	No	N/A
	X		

REQUIRED ELEMENTS (Education Code 47605(A)–(P))/ADDITIONAL REQUIRED INFORMATION

A. Educational Program	Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/> 1. Targeted School Populations PAGE #(s):				
Age, grade levels and number of students	X			
Describe students whom the charter will attempt to educate		X		
<input type="checkbox"/> 2. Attendance PAGE #(s):				
School year, academic calendar, number of school day and instructional minutes	X			
Attendance expectations and requirements	X			
<input type="checkbox"/> 3. What it Means to be an Educated Person in The 21st Century PAGE #(s):				
Objective of enabling pupils to become self-motivated, competent, lifelong learners	X			
Clear list of general academic skills and qualities important for an educated person	X			
Clear list of general non-academic skills and qualities important for an educated person	X			

Comments:

Charter is reducing grade-levels served to grades T-K – 6 from previously approved charter serving students through grade 8. Petition provides data on the racial/ethnic makeup of students as reported from both Data Quest and the school's internal student information system. Instructional days are clearly delineated, and the charter has clear expectations for attendance and procedures in place to encourage attendance and take active steps when students are in danger of becoming truant. TOL has improved chronic absenteeism, lowering their chronic absenteeism rate from 21.4% to 10.2%. There is a clear description of what TOL believes it takes to be an educated person in the 21st Century, and this is in keeping with current understandings of the need for critical thinkers and life-long learners who are able to adapt to a rapidly changing world and workforce. Petition sufficiently outlines both academic skills and non-academic skills important for an educated person.

<input type="checkbox"/> 4. Description of How Learning Best Occurs PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Persuasive instructional design	X			
• Broad outline (not entire scope and sequence) of the curriculum content	X			
• Description of instructional approaches and strategies	X			
• Description of learning setting (e.g. traditional, home-based, distance learning, etc.)	X			
Proposed program strongly aligned to school's mission	X			
Affirmation that, or description of, how curriculum aligned to student performance standards	X			
Outlines a plan or strategy to support students not meeting pupil outcomes	X			
Instructional design or strategies based upon successful practice or research	X			
Describes instructional strategies for special education, Limited English proficient students, etc		X		
<input type="checkbox"/> 5. Additional Requirements for Charter Schools Serving High School Student PAGE #(s):	Strong	Sufficient	Insufficient	N/A
How Charter School will inform parents about the transferability of courses to other public high schools				X
How Charter School will inform parents about the eligibility of courses to meet college entrance requirements				X
Access to broad course of study that includes all of the subject areas described in Education Code section 51210 and subdivisions (a) to (I), inclusive, of Section 51220, as applicable (State Priority 7).				X

Comments:

Petition clearly communicates Tree of Life's educational philosophy and Montessori instructional methodology. Instructional design is based on the Montessori model of education, a well-researched model which encourages personalized, holistic growth with an emphasis on nurturing curiosity and creativity in an atmosphere of freedom with responsibility. This student-centered approach is designed to promote self-directed learners who are able to work both independently and collaboratively. The learning setting is intentional in its design to facilitate the Montessori style of learning. Curriculum is aligned to student learning standards, and measures are in place to support students not meeting expectations. SDAIE instructors work with the few English Learner students enrolled at TOL.

B. Measurable Student Outcomes - "Exit Outcomes" or "Graduation Standards" PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Pupil outcomes are measurable, i.e. specific assessments listed for each exit outcome	X			
How pupil outcomes will address state common core and ELD content and performance standards (State Priority 2)	X			
Clearly stated exit outcomes include acquisition of academic and non-academic skills	X			
Affirmation that "benchmark" skills and specific grade-level expectations will be developed	X			
Affirmation/description that exit outcomes will align to mission, curriculum and assessments	X			
Affirmation that college-bound students wishing to attend California colleges or universities will have the opportunity to take courses that meet the "A-G" requirements				X
Lists school-wide student performance goals students will achieve over a given period of time (State Priorities 4, 5 and 6): Projected attendance levels and rates, chronic absenteeism rate, middle school and high school dropout rate, graduation rate, suspension and expulsion rates, English learner	X			

reclassification rate, Advanced Placement passage with a score of 3 or higher rate, rate of pupils determined prepared for college by the EAP Program, school safety and climate survey satisfaction rate				
Acknowledges that exit outcomes and performance goals may need to be modified over time		X		
If high school, graduation requirements defined and WASC accreditation addressed				X
Comments: <i>Petition includes a well-organized discussion and description of curriculum and instruction design, and instructional approaches to meet the needs of all learners, including English Language Learners and students with IEP's. Exit outcomes are clearly aligned to the school's mission and vision, and include both California State Standards and Montessori standards. In lieu of traditional grade-level standards, and grade reporting, TOL includes a clear description of the Montessori developmental-level expectations and form of non-graded feedback on student progress. TOL utilizes Montessori "Compass Recordkeeping" system that aligns Montessori scope and sequence with Common Core Standards.</i>				
C. The Method by Which Pupil Progress Meeting Pupil Outcomes Will be Measured PAGE #(s):	Strong	Sufficient	Insufficient	N/A
At least one assessment method or tool listed for each of the exit outcomes (State Priority 8)	X			
Assessments include multiple, valid and reliable measures using traditional/alternative tools	X			
Assessment tools include all required state and federal assessments	X			
Chosen assessments are appropriate for standards and skills they seek to measure	X			
Affirmation/description of how assessments align to mission, exit outcomes, and curriculum	X			
Describes minimal required performance level necessary to attain each standard	X			
Outlines plan for collecting, analyzing/utilizing and reporting student/school performance	X			
Comments: <i>Petition offers a clear and thorough description of performance measurement methods and the multiple indicators examined to measure student success. Specific and general assessment strategies are identified for all key pupil outcomes listed. Both CAASPP testing and authentic assessments aligned with state standards and the educational goals of the school are analyzed to guide instruction.</i>				
D. Governance Structure of School Including, But Not Limited to, Parental Involvement PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Describes what role parents have in the governance and operation of the school (State Priority 3)	X			
Describes key features of governing structure (usually a board of directors) such as:	X			
• Compliance with Brown Act, Public Records Act and Conflict of Interest Policy	X			
• Size/composition of board, board committees and/or advisory councils	X			
• Board's scope of authority/responsibility		X		
• Method for selecting initial board members				X
• Board election/appointment and replacement	X			
Affirms future development of, or has set of, proposed bylaws, policies or similar documents		X		
Initial governing board members identified by name or the process to be used to select them				X
Clear description of the legal status of the charter school		X		
Outlines other important legal or operational relationships between school and granting agency		X		
Comments: <i>Petition provides clear explanation of governance structure and the delegation and scope of authority and responsibility for school leadership. Administrative roles are clearly defined. Evidence is included that Tree of Life adheres to all applicable regulatory requirements such as the Brown Act, California Corporations Code, and the Political Reform Act. Bylaws are included in Appendices.</i>				

E. Qualifications to be Met by Individuals to be Employed by The School (State Priority 1) PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Identifies all key staff positions with the school	X			
Describes specific key qualifications (knowledge, experience, education, certification, etc.)	X			
Process to notify to District Personnel Office whenever personnel are hired or leave during the school year	X			
Defines core, college preparatory teachers & affirms they will hold appropriate Commission on Teacher Credentialing certificate, permit or other equivalent document	X			
Identifies any non-core, non-college prep teaching positions staffed by non-certified teachers, along with required qualifications	X			
Comments: <i>Petition includes all required elements.</i>				
F. Health and Safety Procedures (State Priority 1) PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Affirms that each employee will furnish the school with a criminal record summary	X			
Outlines specific health and safety practices addressing such key areas as:				
• Seismic safety (structural integrity and earthquake preparedness)	X			
• Natural disasters and emergencies	X			
• Immunizations, health screenings, administration of medications	X			
• Tolerance for use of drugs and/or tobacco	X			
• Staff training on emergency and first aid response	X			
• Suicide Prevention	X			
References accompanied by a detailed set of health and safety related policies/procedures or the date by which they will be adopted and submitted to the authorizing school district		X		
Comments: <i>Petition includes all required elements and practices and procedures are in compliance with State and Federal regulations, and show understanding of established best-practices.</i>				
G. Means to Achieve Racial & Ethnic Balance Reflective of Authorizing School District PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Lists specific practices/policies designed to attract a diverse applicant pool/enrollment: Practices and policies appear likely to achieve desired racial and ethnic balance		X		
Comments: <i>Tree of Life's petition clearly communicates the school's goal of achieving racial/ethnic balance reflective of the district, and it lists current outreach efforts being undertaken to achieve this goal. While Tree of Life's current racial/ethnic makeup is not reflective of the district, Tree of Life has shown an 8% increase in their Hispanic enrollment. They have a goal of increasing their Hispanic enrollment by at least 1% per year.</i>				
H. Admissions Requirements PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Mandatory assurances regarding non-discriminatory admission procedures	X			
• Posting on the website related to the prohibition against discrimination under Title IX	X			
• Posting on the website related to the prohibition against discouraging enrollment	X			
Charter School Complaint Form (Discouragement of Enrollment) (EC) Section 47605(d)(4)	X			
Admission preferences which are required for conversion charter schools				N/A
Clearly describes admissions requirements, including any preferences	X			
Proposed admissions and enrollment process and timeline, as well as procedures for public random	X			

drawings, if necessary				
Comments: <i>Admissions policies and practices are clearly delineated and meet mandated non-discriminatory regulations. School has posted prohibition against discouraging enrollment on their website and created a Charter School Complaint Form as directed by new law.</i>				
I. Financial Audit PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Procedure to select and retain independent auditor	X			
Qualifications of independent auditor	X			
Audit will employ generally accepted accounting procedures	X			
The manner in which the audit will be conducted	X			
Scope and timing of audit, as well as required distribution of completed audit	X			
Process for resolving audit exceptions and deficiencies to the satisfaction of the authorizing school district	X			
Comments: <i>Petition clearly addresses all indicators</i>				
J. Pupil Suspension and Expulsion PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Detailed, step-by-step process by which student may be suspended or expelled	X			
Reference to a comprehensive set of student disciplinary policies	X			
Outlines or describes strong understanding of relevant laws protecting constitutional rights of students, generally, and of disabled and other protected classes of students, in particular.	X			
Policies balance students' rights to due process with responsibility to maintain a safe learning environment	X			
Explains how authorizing school district or MCOE may be involved in disciplinary matters		X		
Comments: <i>Petition includes clear school-wide rules and behavioral expectations including student behavioral and attendance expectations. Procedures appear to be in keeping with relevant laws protecting the rights of students and in balance with efforts to maintain a safe and orderly learning environment for all. Suspension and expulsion process is clearly delineated and includes consideration of processes for students with disabilities that are compliant with IDEA and section 504. Explanation of how authorizing school district or MCOE may be involved in disciplinary matters is limited to MCOE involvement in expulsion appeals.</i>				
K. Staff Retirement System PAGE #(s):	Yes	No	N/A	
Statement of whether staff will participate in STRS, PERS, or Social Security (if STRS, then all teachers must participate)	X			
Comments: <i>All applicable employees participate in STRS or PERS.</i>				
L. Attendance Alternatives PAGE #(s):	Yes	No	N/A	
States that students may attend other schools or pursue an inter-district transfer in accordance with existing enrollment and transfer policies of their district or county of residence and/or description of other attendance alternatives	X			

Comments: <i>Statement is sufficient</i>				
M. Description of Employee Rights PAGE #(s):	Yes	No	N/A	
States that collective bargaining contract in authorizing school district will be controlling	X			
Whether and how staff may resume employment within the district, if applicable	X			
Sick/vacation leave (ability to carry it over to and from charter school, if applicable)	X			
Whether staff will continue to earn service credit (tenure) in district while at charter school, if applicable	X			
Comments: <i>Petition clearly addresses all indicators</i>				
N. Dispute Resolution Process PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Outlines a simple process for the charter school and the authorizing school district to settle disputes relating to the provisions of the charter	MOU			
Outlines process by charter school will resolve internal complaints and disputes	X			
Comments: <i>Petition clearly addresses all indicators</i>				
O. Labor Relations PAGE #(s):	Yes	No	N/A	
States whether charter or authorizing school district will be employer for EERA purposes	X			
If authorizing school district is to be the employer, includes provisions clarifying charter's role in collective bargaining process				X
Comments: <i>Petition clearly addresses all indicators</i>				
P. Closure of Charter School PAGE #(s):	Strong	Sufficient	Insufficient	N/A
Outlines a description of the process to be used if the charter school closes	X			
Process includes a final audit of the charter school, specific plans for disposition of all net assets and liabilities, as well as for the maintenance and transfer of pupil records	X			
Q. Likelihood Petition Will Successfully Implement the Program of the Charter PAGE #(s):	Strong	Sufficient	Insufficient	N/A
The Petition includes a thorough description of the education, work experience, credentials, degrees and certifications of the individuals comprising, or proposed to comprise, the directors, administrators and managers of the proposed charter school	X			
Comments: <i>Petition provides a thorough description of all required elements and Tree of Life has an established history of successfully meeting the goals and vision of its charter.</i>				
R. Geographic and Site Limitations PAGE #(s):	Yes	No	N/A	
Does the Petition propose to operate a single charter school within the geographic jurisdiction of the school district?	X			

If not, does the Petition demonstrate any basis for an exception permitted by law? In this case, does the Petition provide for the notification steps required by law?			X
Does the Petition identify the precise location where the school will operate?	X		
Does the Petition include a description of the facilities in which the charter school will operate?	X		
S. Grade Level Limitations PAGE #(s):	Yes	No	N/A
In the event an Initial Charter Petition proposes to serve one or more grade levels not served by the district, does it propose to serve all of the grade levels which are served by the district?			X
EFFECTIVE DATE	Yes	No	N/A
Does the Petition demonstrate that the charter school will commence operation by September 30 of its first year of operation?			X
ANNUAL FINANCIAL REPORT PAGE #(s):	Yes	No	N/A
Does the Petition demonstrate that the charter school shall provide the appropriate agencies with a copy of an annual financial report in a format prescribed by the State Superintendent of Public Education?	X		
Comments: <i>Petition meets all requirements.</i>			

REQUIRED SUPPLEMENTAL INFORMATION (Education Code 47605(g))

Financial Plan PAGE #(s):	Strong	Sufficient	Insufficient	N/A
_____ First year operational budget				X
_____ • Start up costs				X
_____ • Cash flow for first three years				X
_____ • Financial projections for first three years				X
_____ Planning Assumptions	Strong	Sufficient	Insufficient	N/A
_____ • Number/types of students	X			
_____ • Number of staff	X			
_____ • Facilities needs	X			
_____ • Costs of all major items are identified and within reasonable market ranges				X
_____ • Revenue assumptions in line with state and federal funding guidelines	X			
_____ • Revenue from “soft” sources less than 10% of ongoing operational costs	X			
_____ • Timeline allows window for referenced grant applications to be submitted and funded				X
_____ Start Up Costs	Strong	Sufficient	Insufficient	N/A
_____ • Clearly identifies all major start up costs				X
_____ Staffing				X
_____ Facilities				X
_____ Equipment and Supplies				X
_____ Professional Services				X
_____ • Assumptions in line with overall school design plan				X
_____ • Identifies potential funding source				X
_____ • Timeline allows for grant and fundraising				X
_____ Annual Operating Budget	Strong	Sufficient	Insufficient	N/A
_____ • Annual revenues and expenditures clearly identified by source	X			

• Revenue assumptions closely related to applicable state and federal funding formulas	X			
• Expenditure assumptions reflect school design plan	X			
• Expenditure assumptions reflect market costs	X			
• “Soft” revenues not critical to solvency	X			
• Strong reserve or projected ending balance (the larger of 5% of revenue or \$67,000)	X			
• If first year is not in balance, identifies solvency in future years and sources of capital sufficient to cover deficits until the school year when the budget is projected to balance				X
• Expenditure for sufficient insurance to name district as also insured/hold harmless agreement	X			
• Expenditure sufficient for reasonably expected legal services	X			
• Expenditure for Special Education excess costs consistent with current experience in the authorizing school district		X		
Cash Flow Analysis	Strong	Sufficient	Insufficient	N/A
• Monthly projection of revenue receipts in line with local/state/federal funding disbursements		X		
• Expenditures projected by month and correspond with typical/reasonable schedules		X		
• Show positive fund balance each month and/or identify sources of working capital		X		
Long-term Plan	Strong	Sufficient	Insufficient	N/A
• Projects revenues and expenditures for at least two additional years		X		
• Revenue assumptions based on reasonable potential growth in local, state and federal revenues		X		
• Revenue assumptions based on reasonable student growth projections		X		
• Reasonable cost-of-living and inflation assumptions		X		
• Annual fund balances are positive or sources of supplemental working capital are identified		X		
Comments: <i>Petition clearly describes financial plans, indicates procedures that follow appropriate practices and reflect realistic projections. Financial reports submitted to UUSD indicate a healthy financial position which enables Tree of Life to provide a stable educational experience for students.</i>				
District Impact Statement	Strong	Sufficient	Insufficient	N/A
Provides district with estimated numbers of students anticipated to enroll	X			
Identifies whether charter will request to purchase support services from district		MOU		
Describes suggested processes and policies between charter and authorizing school district				
Includes:				
• Process, activities and associated fees for oversight of charter	MOU			
• Content, processes, timelines, and evaluation criteria for annual review and site visits	MOU			
• Regular, ongoing fiscal and programmatic performance monitoring and reporting	MOU			
• Content, process, timelines and evaluation criteria for charter renewal	MOU			
Proposed support service needs and suggested payments to district for services rendered				
• Clearly drafted contract/agreement or reference to MOU	MOU			
Identify whether a request will be made for use of district-owned facilities	MOU			
Reasonably detailed lease or occupation agreement for privately obtained facilities	X			

Proposed legal status of school is identified	X		
Describes the manner in which administrative services of the charter school are to be provided	X		
Identify whether school intends to manage risk independently or will seek to secure coverage through the authorizing school district or other public agency	X		
Addresses potential civil liability effects, if any, upon the school and the authorizing district	X		
Comments:			
Special Education/SELPA (Mendocino County SELPA Charter School Policy) PAGE #(s):	Yes	No	N/A
Identifies whether the charter will be an independent LEA for special education purposes	INDP. LEA		
Has consulted with the Mendocino County SELPA Director			X
• Discussed special education responsibilities of charter	X		
• Discussed application of SELPA policies	El Dorado		
Describes how special education services will be provided consistent with Mendocino SELPA Plan and/or policies and procedures	El Dorado		
• Includes fiscal allocation plan	X		
If charter not an independent LEA:	Yes	No	N/A
• Clarifies in charter or an MOU the responsibilities of each party for service delivery			
Referral	X		
Assessment	X		
Instruction	X		
Due Process	X		
Agreements describing allocation of actual and excess costs			X
Charter fiscally responsible for fair share of any encroachment on general funds			X
If charter is LEA within SELPA	Yes	No	N/A
• Notifies SELPA Director of intent prior to February 1st of the preceding school year	El Dorado SELPA		X
• Located within Mendocino County SELPA geographical boundaries			X
• Provides current operating budget in accordance with Ed Code 42130 and 42131			X
• Provides assurances that all be instructed in safe environment			X
• Provides copy of original charter petition and any amendments			X
• Responsible for any legal fees relating to application and assurances process			X
• Meets the terms of the "Agreement Regarding the Organization, Implementation, Administration and Operation of the Mendocino SELPA"			X
• Meets the terms of all Mendocino SELPA policies and procedures			X
• Charter fiscally responsible for fair share of any encroachment on general funds			X
Petition includes the following assurances:	Yes	No	N/A
• The charter will comply with all provisions of IDEA	X		
• No student will be denied admission based on disability or lack of available services	X		
• Will implement a Student Study Team process	X		
• Any student potentially in need of Section 504 services will be the responsibility of the charter school	X		

Petition/MOU describes the process for notifying district of residence and authorizing school district when a special education student enrolls, becomes eligible, ineligible and/or leaves charter school	X		
Overview of how special education funding and services will be provided by:			
• Charter School	El Dorado SELPA	X	
• Charter Granting Agency	El Dorado SELPA	X	
• SELPA	El Dorado SELPA		
Petition/MOU describes the transition to or from a district when a student with an IEP enrolls in, or transfers out of, the charter school	X		

Comments

Tree of Life Charter School is not a member of the Mendocino County SELPA. They elected to join the El Dorado Charter SELPA and act as their own LEA for the purpose of Special Education Services. The Petition clearly addresses all aspects of Special Education and 504 services as required by law.

ANNUAL PERFORMANCE AUDITS

Petition/MOU describes what will occur during performance audits, including:	Strong	Sufficient	Insufficient	N/A
• Review of each component of Initial/Renewal Charter Petition for compliance				
• Analysis of whether goals are being met; review of all state and federal student assessment data and reports				
• Summary of major decisions made/policies established by the board in each year				
• Data on level of parent involvement in governance and operation of the school				
• Summary data from annual student/parent satisfaction survey				
• Data regarding number of staff, their qualifications and verification of credentials				
• Copy of health/safety procedures and summary of any major changes				
• Determination of the suitability of the facility in terms of health and safety				
• Determination of the suitability of the facility in terms of educational utility				
• Review copies of all required documentation (e.g. budget reports, financial projections, leases, insurance, etc.)				
• Overview of admission practices				
Number of students actually enrolled				
Waiting lists				
Expulsions and suspensions				
• Review of any internal/external dispute resolutions				
Site visit by granting agency including observation of the instructional program				

Comments:

CHARTER RENEWAL
Did the Charter School Do What It Said It Would Do?

Questions to Address	Strong	Sufficient	Insufficient	N/A
Terms of the Charter				
Are all the required terms of the charter in place, including changes in Charter School Law and Regulations?	X			
Are all the terms of the original/amended charter fully implemented?	X			
Are the implemented programs consistent with the terms of the charter?	X			
Are the operations consistent with the terms of the charter?	X			
Academic Program				
Has the school made reasonable progress in meeting internally established goals?	X			
Is student performance significantly improved and/or consistently strong as indicated by test results?		X		
Viability of School				
Financially solvent?		X		
Enrollment stable and near capacity?		X		
School governance sound?	X			
Professional staff competent?	X			
	Yes	No	N/A	
Submit charter renewal proposal in accordance with timelines and process outlined in Board of Education Policy of authorizing school district	X			
If approved, authorizing school district forwards notice to CDE and other agencies as required by law	X			

Comments:

Tree of Life Charter School petition adequately addresses all terms of the charter within the petition. Additionally, TOL has an established history of meeting compliance requirements, operating within regulatory statutes, fully implementing terms of the initial charter, and producing sufficient academic outcomes as demonstrated through multiple measures, including State Mandated Assessments. TOL is financially solvent, maintains a stable enrollment near capacity, demonstrates sound governance, and employs competent professional staff. All indicators suggest that the charter has done what it said it would do.