



# LOS ANGELES UNIFIED SCHOOL DISTRICT

## POLICY BULLETIN

**TITLE:** Affiliated Charter Schools

**NUMBER:** BUL-5439.0

**ISSUER:** Michelle King, Deputy Superintendent, School Operations  
Office of the Superintendent

### ROUTING

All Local Districts  
Division Heads  
Affiliated Charter  
Schools

**DATE:** March 11, 2011

**POLICY:** This Policy Bulletin defines an “affiliated charter school” and the relationship of such schools with the District, including the autonomies provided to affiliated charter schools.

**MAJOR  
CHANGES:** Not applicable.

#### A. Definition of “Affiliated Charter School”

Affiliated charter schools are semiautonomous public schools governed by the LAUSD Board of Education and operate in accordance with District policy, Board Rules, state and federal law, the relevant provisions of collective bargaining agreements and Personnel Commission guidelines. As described below, affiliated charter schools receive flexibility in the utilization of the categorical block grant; areas of curriculum and professional development; local school governance; and some aspects of employee selection. Affiliated charter schools also serve as additional school models to explore, develop and disseminate innovative, effective practices that best meet the educational needs of their students and all students of the District.

#### B. Attributes of an Affiliated Charter School

Consistent with the terms of this Policy Bulletin, applicable collective bargaining agreement provisions, laws, regulations, Board Rules and District policies, and the provisions of each school’s respective charter petition, an affiliated charter school will have the autonomies in the following areas:

1. School-site budgeting;
2. Authority to reduce class sizes below District norms, where possible;
3. Instruction, curriculum and assessments;
4. Professional development;
5. Class scheduling and the “banking” of time for professional development;
6. Enrollment processes; and
7. School site specific policies.

This Policy Bulletin shall apply to any school that has been or will be authorized as an affiliated charter school by the LAUSD Board of Education.



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### C. Governance

As discussed above, affiliated charter schools are subject to the governance of the LAUSD Board of Education, which has a fiduciary responsibility over these schools. Governance at the school site level shall be in accordance with each school's charter petition and will be consistent with all applicable state and federal laws and regulations and provisions of collective bargaining agreements. Any governance model in conflict with the above shall be null and void unless the appropriate parties have agreed to a waiver or exemption. Absent agreed upon waivers between the District and UTLA, Article XXVII of the LAUSD – UTLA CBA must be adhered to, particularly in regard to Local School Leadership Council composition and responsibilities.

### D. Fiscal Relationship

#### 1. Autonomy – Categorical Block Grant Funds/Local Fundraising

Affiliated charter schools shall have control over the budgeting and expenditure of its categorical block grant funds, including, but not limited to, the right to maintain such funds and/or establish reserves for carry over for future school year expenditures. It is understood, however, that a portion of categorical block grant funding is provided to affiliated charter schools as part of the Targeted Instructional Improvement Grant, which is and will be used to support class size reduction for schools identified as Desegregated Receiver and Predominantly Hispanic Black Asian and Other (PHBAO). An affiliated charter school must cover the cost of class size reduction commensurate with its Integration Court Order designation (Desegregated Receiver or PHBAO).

The affiliated charter schools will oversee the receipt and management of the categorical block grant and other fund allocations, and shall be expected to adhere to generally accepted accounting principles. Affiliated charter schools may also be subject to audits to verify the accuracy of the school's financial statements and the books and records relating to its expenditures, as well as its attendance records, accounting practices and internal controls.

#### 2. Other Sources of Funding

The District shall retain general purpose entitlement funds and any other state or federal funding (with the exception of grants separately applied for and received by the affiliated charter school), to maintain the affiliated charter school in accordance with their annually adopted budget and consistent with staffing norms and support at the District norm levels. As discussed above, however, funding from the affiliated charter schools will be used to enable the school to receive norm levels at the PHBAO or desegregated receiver level, as appropriate.



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### 3. Timing for Distribution of Categorical Block Grant Funds

Except as discussed above, the District will continue to partially front-fund the categorical block grant allocation to the affiliated charter schools. The categorical block grant is subject to adjustment in funding levels and deferrals on the part of the California Department of Education. Consequently, allocations from the categorical block grant to the affiliated charter schools may also be subject to adjustment in funding levels and deferrals. In addition, these schools may also be subject to District “freezes” in a manner consistent with other District schools.

### 4. Administrative Fees

The District will retain an administrative fee from the categorical block grant to cover part of oversight costs. This administrative fee is approximately 2 percent of the categorical block grant.

### 5. Payment for Other Services

Services for programs funded through the categorical block grant, such as assessments for the GATE program, will be separately charged to the affiliated charter schools. In addition, it will be the responsibility of the affiliated charter school, from site based discretionary resources, to pay for any different or additional level of service above the norm provided to District schools generally. The District shall, upon request, provide a listing of the costs of providing such services.

### 6. Documentation

The affiliated charter schools’ financial reports shall remain a part of the District’s single report to the Los Angeles County Office of Education or other regulatory body, as applicable. Affiliated charter schools shall prepare and submit all required financial data and reports for inclusion in the District’s report.

### 7. Per-Pupil Budgeting

Where possible, an affiliated charter school will have the ability to implement the District’s per-pupil budgeting model.

#### E. Personnel

Affiliated charter schools shall continue to follow all applicable state and federal laws and regulations and collective bargaining agreements. Any conflict with the above shall be null and void unless the appropriate parties have agreed to a waiver or exemption.



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Absent agreed upon waivers between the District and UTLA, Article XXVII of the LAUSD – UTLA CBA must be adhered to, particularly in regard to Local School Leadership Council composition and responsibilities.

### 1. Certificated Personnel

Selection of certificated staff will be aligned with current Education Code, District Policy, and collective bargaining agreements. Schools will have the autonomy to interview and select teachers and school-funded support staff from District approved lists of eligible candidates. Available lists will be determined by Human Resources and may be limited to Priority Placement Lists (displaced teachers) and Rehire Lists depending on the current hiring situation in each subject area. While every effort will be made to avoid assigning any certificated employee to an affiliated charter campus, the District retains the right to make such assignments in cases where no other alternative is available (i.e. Reasonable Accommodation).

### 2. Classified Personnel

Selection of classified staff will be in compliance with the current merit system provisions of the Education Code, the Personnel Commission Rules and applicable collective bargaining agreements. Unless valid reemployment lists exist, affiliated charter schools will have the autonomy, when selecting employees for regular assignment, to select from the top three eligible candidates on current valid eligibility lists promulgated by the Personnel Commission. When valid reemployment lists exist, every effort will be made to avoid assigning classified staff to affiliated charter schools, however, the Personnel Commission retains the right to make such assignments in cases where no alternative is available (e.g. reductions-in-force or reasonable accommodations required in compliance with the Americans with Disabilities Act.)

Unless the District has assigned all employees in a classification to a specific basis, affiliated charter schools will have autonomy in assigning positions to specific working basis.

### F. Professional Development

In addition to any District-mandated professional development, affiliated charter schools shall have full autonomy in the selection of professional development programs for their employees to meet their site-specific needs. Any professional development required by the District for newly-adopted curriculum selected by the affiliated charter schools will, in turn, be funded by the District consistent with its practice for other District schools.



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### G. Educational Program and Schedule

#### 1. Educational Program

Affiliated charter schools shall have full autonomy in their instructional programs and choice of curricular materials, consistent with the requirements of section 60000 of the Education Code, the Williams settlement, and the terms of their respective charter petitions.

#### 2. Schedule

Provided the minimum requirements for instructional minutes, day and calendar year and in accordance with applicable collective bargaining agreements are met, affiliated charter schools shall have flexibility in creating its bell schedule. Any costs associated with changes to instructional and/or work calendars, such as salaries, personnel costs, transportation costs, cafeteria costs, maintenance and operations costs, etc. will be borne by the affiliated charter schools.

#### 3. Special Education

The District shall continue to serve the needs of special education students enrolled in the affiliated charter schools in the same manner as at any other public school of the District, and shall be responsible for meeting all the requirements of the Modified Consent Decree.

#### 4. Periodic Assessments

Affiliated charter schools shall determine their development, implementation or use of periodic assessments according to the needs of its students, within the limits permitted by the Education Code. Affiliated charter schools may choose to use District assessments or design its own and will determine the timing of such assessments and coordinate with the respective Local District.

### H. Integration Program

Affiliated charter schools shall be responsible for following the requirements of the Crawford desegregation court order, and shall take all reasonable steps to attract and maintain a racially integrated student body. Integration Program resources currently provided to certain affiliated charter schools (Magnet, Permits with Transportation, Transportation) are subject to change, in whole or in part, for budgetary and other reasons.

**ASSISTANCE:** For Assistance or further information, please contact the Innovation and Charter Schools Division at 213-241-2487.