



## Request for Material Revision Checklist Requirements

Charter school operators seeking a material revision of a school’s current charter should review and refer to the *LAUSD Policy and Procedures for Charter Schools* (“Policy”). This checklist serves as a supplemental tool to the Policy. **Implementation of a material revision without the prior approval of the LAUSD Board of Education is a material violation of the charter and may constitute grounds for revocation.** Material revisions shall take effect upon approval by the LAUSD Board of Education, unless noted otherwise.

It is important to note that the Charter Schools Division (CSD) expects all proposed material changes to a charter (whether deemed material or non-material for the purposes of processing) to be submitted for consideration prior to implementation and with enough time to allow for the authorizer (LAUSD Board of Education) to consider the requested change. While there is no applicable statutory or regulatory timeline governing when the chartering authority (i.e., LAUSD Board of Education) must consider the request for a material revision, in accordance with the Policy, CSD staff will present its recommendation to the LAUSD Board of Education for consideration within 120 days after processing has commenced. Material revisions must be submitted during a Target Window that corresponds with a Board of Education meeting date in order to meet the 120-day deadline – (see *Target Windows for Material Revision Submission* for the current year available on the CSD website). Once the charter school has submitted a material revision application, CSD staff, in coordination with other appropriate LAUSD divisions, within seven (7) business days, will review the submitted application materials and determine whether such materials contain the information and/or documents necessary to begin processing.

In order to be accepted for review, a request for material revision of a charter requires submission during the Target Windows for Material Revision Submission of the following completed items:

- Letter to the Director of the CSD, on school letterhead, that clearly identifies the requested material revision(s). The letter shall include relevant background information, including the charter school’s reason for seeking the material revision(s).
  
- The school’s analysis and discussion of the educational soundness of each requested revision and the organization’s capacity to successfully implement the proposed change(s), as demonstrated by its record of academic, operational, and organizational management performance.

- ❑ The school’s clear identification and description of each addition, change, and deletion proposed to be made in the school’s current approved charter along with the associated page number(s).
- ❑ Resolution, approved by the school’s Governing Board (with, at minimum, board meeting agenda and draft meeting minutes) and duly signed by its Board Secretary, which:
  - a. Specifically identifies the revision(s) proposed to be made to the charter school’s current approved charter
  - b. Sets forth the rationale for the proposed material revision(s)
  - c. Authorizes the submission of the request for the material revision(s) to LAUSD
  - d. Names the representative authorized to execute (sign) the amendment document and otherwise act on behalf of the charter school with respect to the material revision application process
- ❑ Revised Budget & Cash Flow Projections for the remainder of the current charter term, beginning with the current year, including projected student enrollment by grade level (Grades TK and K should be separated), month-to-month cash flow projections, and budget assumptions (MS Excel format, with formulas, contain no hidden cells/rows/columns, no links to external files, and not be password protected)
- ❑ Supporting documentation necessary to review and assess the request. For example, a request for material revision to add a facility may contain supporting documentation such as a lease agreement and documentation that a proposed new site complies with all applicable building and safety codes, and Certificate of Occupancy (“COO”) or equivalent. Other examples may include, but are not limited to, revised Bylaws and/or Articles of Incorporation, waitlist information, revised admissions forms, supporting documentation relating to grants and/or financing (e.g., signed and executed agreements and/or award letters, including terms and conditions, bank statements, and/or other documents that substantiate the sources of funds), and/or other data to support the proposed change(s).
- ❑ For a proposed change in location/address or expansion to one or more additional sites outside of the community as defined in the Policy, or expansion of grade levels served, a completed Community Impact Assessment must be submitted. Please refer to the Community Impact Assessment guidelines in the “Material Revision” section of the Policy.

The Community Impact Assessment must include the following components, at a minimum, to respond to requirements set forth in the Policy:

- 1) Identification of the Community as defined in the Policy.<sup>1</sup>
- 2) Facilities Plan
- 3) Evidence of Community Engagement with the following stakeholder groups:

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<sup>1</sup> As defined by *LAUSD Policy and Procedures for Charter Schools*, a “community” includes families and individuals who reside, work, and/or are served in the identified geographical area, and all public schools (District and charter), serving similar grade levels as the proposed new charter school. The identified geographical area will be based on LAUSD Community of Schools and neighborhoods within a three-mile radius from the location identified by the petitioners.

- a. Parents in the Community
  - b. Existing Public Schools (confer with the District (Charter Schools Division) regarding a list of schools)
  - c. Neighborhood Councils
  - d. Community-based Organizations
  - e. Elected Representatives
  - f. LAUSD Region and Community of Schools Leadership
  - g. LAUSD Board of Education Members
- 4) Assessment of Duplication of Programs
  - 5) Consideration of Academic Performance

Note: Petitioners shall clearly cite and provide sources for all data and information used to inform assertions in their Community Impact Assessment. The Community Impact Assessment shall include a record of outreach and audiences reached (e.g., multilingual notices, materials, meeting agendas, sign-in sheets, survey results, etc.). The Community Impact Assessment is to be complete at the time of submission. As part of the submitted materials, Petitioners are to include publicly disclosable information/documentation of the stakeholders' responses (to the extent possible) and a summary of the responses received from stakeholders as part of the petitioner's assessment of the impact to the community, which will be shared with the LAUSD Board.

Additional Notes:

- 1) The school should contact the school's CSD assigned administrator prior to preparing the application materials to discuss the extent of the proposed revisions, including but not limited to, if the request will impact multiple charters of the same organization. The CSD administrator will work with the school to determine an appropriate method for submitting the proposed changes.
- 2) The school should contact the school's assigned administrator to make an appointment for one of the Material Revision Target windows identified in *Target Windows for Material Revision Submission* for the current academic year available on the CSD website. The school may submit the required material revision request documentation during the agreed upon Target Window to the CSD assigned administrator. The Charter Schools Division administrator will establish a Dropbox folder for the submission.

For further information, please see the "Material Revisions" section of the Policy, the Target Windows for Material Revision Submission, and the Community Impact Assessment template for Material Revisions (as applicable) available on the CSD website. Additionally, the school's assigned CSD administrator is available to address questions regarding the request for material revision review process.