

Healy School Charter Appeal

On December 22, 2022, the Marin County Board of Education (MCBE) received the Healy School Charter Petition (Healy School/Petitioner/Petition) on appeal from the Novato Unified School District. Previously, in November 2022, the MCBE Charter Ad Hoc Committee (Committee) was formed, in accordance with MCBE Board Policy 8422. The purpose of the Committee is to provide a review and recommendation to the full board of an anticipated charter petition appeal received by the MCBE. The Committee has completed its review of the Healy School Charter Petition and this document provides its recommendation to the full MCBE.

First and foremost, the Committee would like to express thanks to the Marin County Office of Education (MCOE) staff, the Petitioner, and the Novato Unified School District (District). The Committee has met with all parties, and all parties have been forthcoming and responsive with the requested information. All documents and information gathered in the making of the Committee’s decision are provided as attachments to this report.

The Committee recognizes and appreciates the Petitioner’s responsiveness and collaborative approach in working with the Marin County Office of Education staff and Committee.

Committee Recommendation

The Committee recommends denial of the Healy School Charter Petition, on appeal, based on the determination that the Petitioners are demonstrably unlikely to successfully implement the program set forth in the petition; the petition does not contain reasonably comprehensive descriptions of all of the required fifteen (15) elements; and, the charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposing to locate, as supported by the findings described below and in the attached review documents.

The Committee Process

As set forth in Education Code 47605, and MCBE Board Policy 2301, the review process has been guided by the intent of the Legislature that charter schools are and should become an integral part of the California educational system and that the establishment of charter schools should be encouraged.

Upon receiving the petition on appeal from Healy School, the Committee authorized the MCOE staff to conduct a review of the Petition by using the Fiscal Crisis Management and Assistance Team (FCMAT) review matrix (Matrix). The completed Matrix can be found on Appendix A. Upon completion of a preliminary review, a series of clarifying questions were then forwarded to the Petitioner.

Applying the standards of the MCOE’s school district and charter school finance and fiscal oversight experience, staff also produced a series of financial modeling using alternative expenditure and revenue assumptions in order to assess the Petitioner’s ability to successfully operate the charter school. Specifically, Healy School’s budget is built on an expected enrollment of 95 students in the first year. However, MCOE staff’s review confirmed the Petitioners secured 48 meaningful interest forms, representing half of the projected enrollment. Additionally, some parents asked to have their interest forms withdrawn during the MCBE public hearing held on February 14, 2023. Also, notably no parents spoke in

support of Healy School. Consequently, MCOE staff prepared financial models with alternative financial data, including adjusted enrollment counts as well as other financial data called into question for the charter’s first and subsequent years of operation. The additional financial models can be found in Scenario A (Appendix B-A), Scenario B (Appendix B-B), Scenario C (Appendix B-C) and Scenario D (Appendix B-D). Three of the four scenarios show the Healy School to be insolvent.

Marin County Office of Education as a Fiscal Oversight Agency

The Marin County Office of Education (MCOE) has a long history of high standards of fiscal stewardship for its seventeen school districts. Under its AB1200 roles and responsibilities, the MCOE conducts financial reviews of school district budgets four times each year. Moreover, the MCOE staff has extensive years of school district and charter school fiscal oversight and chief business official experience. It is from this experience, and the fiscal oversight standards of the MCOE, that the MCOE staff provided its analysis and financial modeling, as demonstrated through the multiple financial scenarios, to assess the fiscal health of the proposed charter school.

The Committee Meets with Petitioner and District

After reviewing a draft of the completed Matrix, the Committee met with the Petitioner and then separately with the District. During the meeting with the Petitioner, the Petitioner provided responses to written questions forwarded to the Petitioner on February 15 and 16, 2023 (Appendix C). On February 16, 2023, the Petitioner was provided with a Financial Analysis (Appendix B) used by staff to assess the probability of fiscal solvency. Petitioner provided written responses (Appendix D) to the questions on February 22, 2023 and February 26, 2023. On February 27, 2023, the Committee met with District representatives. During the Committee’s meeting with the District, the District shared its process and rationale for their review of the Healy School Charter Petition.

Committee Findings

Review of the Petition resulted in the following findings:

- 1. Education Code Section 47605(c)(2): The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.***

The Petition did not demonstrate sufficient evidence to support the likelihood of financial solvency.

While the Petition was presented with a budget that allowed the accumulation of a reserve in excess of 50% of expenses by year 5, the Review Team analysis indicates the projected budget is at high risk of having overstated revenues and understating expenses. The MCOE staff’s initial budget review identified significant risks to the budget.

As noted above, MCOE staff identified the proposed charter school’s projected enrollment overall as at risk when considering publicly stated opposition from parents who had previously signed some of the 48 meaningful interest forms identified by the Petitioner. The Spanish speaking parents who spoke during the public hearing

shared they did not understand they were signing a petition for a charter school and did not intend to enroll their children at Healy School.

Additionally, after meeting with the Petitioner and gaining greater insight into the possible ways in which the charter could secure a facility and or the funding to pay for such, the Committee identified facility costs as a potential risk to fiscal solvency of Healy School as noted in the Matrix (Matrix: Facilities, 2c). Specifically, the facility rent amounts stated in the Petition are not consistent with market rates for the area proposed for the Healy School. Also, leasehold improvement costs were not identified in the Petition. The Healy School budget relies on facility revenue from California's Charter School Facility Grant Program (SB740). To qualify for this funding, however, a charter school must enroll greater than 55% of students who either qualify for free and reduced price meals or are English Learners, foster youth, or are economically disadvantaged. Alternatively, charter schools may qualify for these funds if they are located in school areas who serve a majority of these same student demographics. If Healy School locates a facility in the target area, SB740 funds seem likely. Nevertheless, the demographics identified in the Petition are inconsistent with the demographics required in SB740, specifically as it relates to English Learners, which appears to indicate Healy School is not prepared to serve the same percentage of English Learners found in the target area. The Committee's review therefore found inconsistencies with the projected demographics of the Petition and the target enrollment area.

The Committee then asked the Petitioner to confirm the demographics they intend to serve and in written response the Petitioner identified southern and central Novato as target demographics, which confirmed communities that have relatively high levels of low income students and relatively high levels of English Learners. However, Healy School's demographics project less than half the percentage of English Learners found in the target enrollment area. The staff budget analysis also revealed the budget does not include an allowance for specialized instruction outside of the general education teacher. The Committee therefore found that Healy School is not prepared to serve the demographic of English Learners known to be prevalent in the target enrollment area. This inconsistency was also found through MCOE staff's review of Healy School's curriculum and instructional elements of their Petition as demonstrated in the Matrix.

MCOE staff then prepared Scenarios A, B, C, and D to model the impact of reduced enrollment as well as scenarios with and without SB740 funding. Each scenario includes a detailed list of assumptions. Additional areas of financial risks were also identified and included in the budget scenarios, including items related to curriculum, materials and supplies and start up costs.

In summary, the Committee's review identified significant fiscal risks to Healy School's ability to successfully implement the program set forth in the Petition.

2. ***Education Code Section 47605(b)(5): The petition does not contain reasonably comprehensive descriptions of all of the 15 elements (A - O),*** as noted below and described in the Matrix (Appendix A).

Element A: EC 47605(c)(5)(A) Description of Vision, Mission and Educational Program

The petition does not contain reasonably comprehensive description of enrollment projections (Matrix p. 3, Element A:2b)¹;

The educational program described in the petition does not contain reasonably comprehensive

¹ To assist the reader, we have added references to where the basis for denial can be found in the Matrix.

goals that are consistent with enabling all pupils to become or remain self-motivated, competent, lifelong learners (Matrix p. 4, Element A:3a);

The education program described in the petition does not contain reasonably comprehensive description of a framework for instructional design that is aligned with the needs of the students that the charter has identified as its target student population, specifically English Learners (Matrix p. 4, Element A:4a);

The petition does not contain a reasonably comprehensive description of how the charter school will identify and meet the needs of students with disabilities, English Learner students, students who are achieving substantially above or below grade level expectations, and other special student populations (EC 52052 (a)(2)); a description demonstrating an understanding of the English Learner population; sound approach to identify and meet the needs of significant subgroup populations for the target area (Matrix p. 5, Element A:4e).

Element B: EC 47605(c)(5)(B) Measurable Student Outcomes

The petition does not contain a reasonably comprehensive description of additional school priorities related to unique aspects of the proposed charter school program, with goals and specific annual actions (Matrix p. 10, Element B:4).

Element D: EC 47605(c)(5)(D) Governance Structure

The petition does not contain specific policies and internal controls that will prevent fraud, embezzlement and conflict of interest, and that ensure the implementation and monitoring of those policies (Matrix p. 15, Element D:5).

Element E: EC 47605(c)(5)(E) Employee Qualifications

The petition does not contain a reasonably comprehensive description of the requirements for appropriately credentialed teachers working with English Learners (Matrix p. 16, Element E:1).

Element F: EC 47605(c)(5)(F) Health and Safety Procedures

The petition does not contain reasonably comprehensive descriptions of the health and safety practices, including natural disasters and emergencies, the monitoring and implementation of requirements such as immunizations, vision, hearing and scoliosis health screenings, and administration of medications, and notification to students, parents and guardians on how to access student mental health services on campus and/or in the community (Matrix p. 19, Element F:5).

Element J: EC 47605(c)(5)(J) Suspension and Expulsion Procedures

The petition does not include reasonably comprehensive descriptions of the process for suspensions of fewer than ten (10) days and the process for suspensions of ten (10) days or more and all other expulsions for disciplinary reasons. (Matrix p. 25, Element J:1c and 2a).

Element N: EC 47605(c)(5)(N) Dispute Resolution Procedures

The petition does not include a reasonably comprehensive description of the process by which the charter will resolve internal complaints and disputes and does not include a Uniform Complaint procedure (Matrix p. 30, Element N:2 and 2a).

Element O: EC 47605(c)(5)(O) Closure Procedures

The petition does not include a reasonably comprehensive description of the procedures to be used if the charter school closes, including disposition of the charter school's assets to a non-profit (Matrix p. 32, Element O:3b and 3c).

3. Education Code Section 47605(b)(7)(A-B): The charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposing to locate.

The Committee has determined that it is reasonable to assume that the charter will substantially undermine existing school district services, academic offerings, or program offerings.

The Petition states Healy School would receive SB740 funds and indicates the location of the charter would be within the Hamilton area of Novato. When fully built out, the Healy School enrollment projections equal half of the current Transitional/Kindergarten through fifth grade (TK-5) enrollment at Hamilton School (a Transitional/Kindergarten through eighth grade (TK-8) elementary school located within the Novato Unified School District (NUSD)). It is therefore reasonable to assume that a TK-5 charter school located within the same area as the current Hamilton School would draw students from that area resulting in a reduction in enrollment of the TK-5 population of the TK-8 school. This would create a substantial impact to the existing school, including services, academic and program offerings.

Further review determined that the resiliency program offered by the Healy School would duplicate existing NUSD programs that have capacity and similar current programming to support the students the Healy School is aiming to serve.

The petition does not contain sufficient detailed information demonstrating how it is not a duplication of NUSD programming. Specifically, the charter emphasizes resilience and the Petition included stated skills students would learn through a resilience-focused framework. However, upon review of the skills (e.g. coping skills, problem solving skills, etc.) students would learn as an outcome of the resilience framework does not differ from existing offerings at the NUSD. A review of the current NUSD Kindergarten report card includes "exhibits self control, demonstrates cooperation, respects others" among other skills. The Committee therefore concluded that the Petition does not distinguish between the Healy School's primary emphasis and existing opportunities with the District, thereby making it a duplicative program within NUSD.

Additional Findings

1. EC 47641(a) and EC 47646 Special Education

The petition indicates the charter intends to operate as an independent LEA within a SELPA. The Petitioner has not provided evidence that the charter notified the SELPA director of its intent to participate before the February 1 of

the preceding school year as required, nor did the Petition include a fiscal allocation plan in alignment with the SELPA the charter plans to join.

2. EC 47605(h) Facilities

The petition does not sufficiently identify the types and the location of the charter school facility or facilities that the petitioner proposes to operate; the current and projected availability of each charter school site, and schedule for securing the facility; nor adequate budget for anticipated costs, including leasehold improvements, renovation, rent, maintenance and utilities.

Committee Recommendation

It is the conclusion of the Committee to recommend denial of the Petition appeal for the Healy School, per the following: *Education Code Section 47605(c)(2): The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition; Education Code Section 47605(b)(5): The petition does not contain reasonably comprehensive descriptions of all of the 15 elements (A - O), specifically elements A, B, D, E, F, J, N, O; and Education Code Section 47605(b)(7)(A-B): The charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposing to locate.*

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Appendix A:
Charter School Petition Review Matrix
and Staff Review Team

Charter School Petition Review Findings

Education Code 47605(c)

In reviewing petitions for the establishment of charter schools pursuant to this section, the chartering authority shall be guided by the intent of the Legislature that charter schools are and should become an integral part of the California educational system and that the establishment of charter schools should be encouraged. The governing board of the school district shall grant a charter for the operation of a school under this part if it is satisfied that granting the charter is consistent with sound educational practice and with the interests of the community in which the school is proposing to locate. The governing board of the school district shall consider the academic needs of the pupils the school proposes to serve. The governing board of the school district shall not deny a petition for the establishment of a charter school unless it makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the following findings:

- (1) The charter school presents an unsound educational program for the pupils to be enrolled in the charter school.
- (2) The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.
- (3) The petition does not contain the number of signatures required by subdivision (a).
- (4) The petition does not contain an affirmation of each of the conditions described in subdivision (e).
- (5) The petition does not contain reasonably comprehensive descriptions of all of the 15 elements (A - O).
- (6) The petition does not contain a declaration of whether or not the charter school shall be deemed the exclusive public employer of the employees of the charter school for purposes of Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code.
- (7) The charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposing to locate. Analysis of this finding shall include consideration of the fiscal impact of the proposed charter school. A written factual finding under this paragraph shall detail specific facts and circumstances that analyze and consider the following factors:
 - (A) The extent to which the proposed charter school would substantially undermine existing services, academic offerings, or programmatic offerings.
 - (B) Whether the proposed charter school would duplicate a program currently offered within the school district and the existing program has sufficient capacity for the pupils proposed to be served within reasonable proximity to where the charter school intends to locate.
- (8) The school district is not positioned to absorb the fiscal impact of the proposed charter school. A school district satisfies this paragraph if it has a qualified interim certification pursuant to Section 1240 and the county superintendent of schools, in consultation with the County Office Fiscal Crisis and Management Assistance Team, certifies that approving the charter school would result in the school district having a negative interim certification pursuant to Section 1240, has a negative interim certification pursuant to Section 1240, or is under state receivership. Charter schools proposed in a school district satisfying one of these conditions shall be subject to a rebuttable presumption of denial required Petition Elements

The 15 Charter Elements

Criteria in **RED** indicate descriptions that are required under law to be included in the charter petition.

Criteria in **BLACK** are descriptions strongly suggested to be included to ensure that the charter petition is reasonably comprehensive.

A. Description of Vision, Mission and Educational Program			
Evaluation Criteria: EC 47605(c)(5)(A)	Evaluation Standard Met		Located on Page(s)
THE PETITION DESCRIBES, AT MINIMUM	YES	NO	
1. Targeted Student Populations and Community Need			
<p>a. Students the charter school will try to educate and a demonstration of the need for proposed educational program.</p> <p>The Petitioner identified in multiple areas a focus on resilience development for all students and aims to target specific student groups.</p>	✓		P. 12, 20
<p>b. Grade levels and number of students the charter school plans to serve.</p> <p>The petition included the plan to include students in grade TK through grade 5.</p> <p>The projected enrollment summary plans to serve 95 students in grades TK though second grade in its opening year.</p>	✓		P.11 P. 199
<p>c. A clear, concise school mission and vision statement that aligns with the target population.</p> <p>The petition includes both a vision and a mission statement.</p>	✓		P. 14 , 20, 22
<p>d. The needs and challenges of the student groups to be served.</p> <p>The petition outlines the needs and challenges to be addressed by Healy School. However, it lacks specific strategies for specific student groups found in the targeted enrollment area.</p>	✓		P. 20-23, 25-26
2. Attendance (5 CCR 11960)			
<p>a. School year/academic calendar, number of school days and instructional minutes (EC 47612.5(a)).</p> <p>Petition does not include an academic calendar but states it will follow the NUSD calendar. 180 days of instruction and TK/K 36,000 minutes and Grade 1-3 50,400 minutes, Grades 4-8 54,000 minutes</p>	✓		P.58-59

<p>Per p. 4 of the response to the district, petitioner noted there would be 10 days of professional development at the start of the year (5 days extra duty + 5 days wrapped into teachers exempt annual salaries.</p> <p><input checked="" type="checkbox"/> Petitioner response to clarifying question: Satisfied; written response dated February 22, 2023</p>			
<p>b. Attendance expectations and requirements, including enrollment projections.</p> <p>Petition identifies an Average Daily Attendance expectation of 95%. Chart on Page 199 of the petition includes enrollment projections. Specifics on attendance expectations and requirements were not found.</p> <p>Petition states the Charter will maintain written contemporaneous records that document all pupil attendance and will make these records available for audit and inspection. Specifics on how this will be maintained were not found.</p> <p>The projected year 1 enrollment is anticipated to be 95 students across grades TK-2 based on the demographics of southern Novato.</p> <p><input checked="" type="checkbox"/> Petitioner response related to attendance expectations and requirements: Satisfied; written response dated February 22, 2023 provides additional information including expectations and requirements for regular attendance, tardies, and independent study and that the Charter will monitor student attendance with AERIES, or a similar student information system, which produces reports and tracking information. However, the description lacks detail to clarify who will monitor attendance and be responsible for the various functions, including what sort of outreach will occur to families. Nevertheless, the Petitioner's response minimally satisfies the requirement.</p> <p><input type="checkbox"/> Petitioner responses related to enrollment projections: Not satisfied; written response dated February 22, 2023 is inconsistent with information provided by the Novato Unified School District as well as parents who signed meaningful enrollment forms for the Charter and who spoke at the Marin County Board of Education public hearing on February 14, 2023. It is therefore reasonable to question the basis of the enrollment projections.</p>		✓	P. 98, 199, 200 p. 9
<p>c. Master/daily schedule and proposed bell schedule.</p> <p>A sample daily bell schedule was included in the Petition.</p>	✓		P. 59- 62
<p>3. What It Means to Be an Educated Person in the 21st Century (5 CCR 11967.5.1 (f)(B))</p>			

<p>a. Goals that are consistent with enabling all pupils to become or remain self-motivated, competent, lifelong learners.</p> <p>The petition includes a list of 18 qualities with 5 connected to program focus with measurable outcomes. The LCAP goals are general in nature and not clear or specific goals that address what it means to be self-motivated, competent, lifelong learners.</p> <p>No other goals are identified in the petition, other than LCAP, that include specific growth targets for pupils.</p> <p><input type="checkbox"/> Petitioner response to clarifying question: Not satisfied; Written response dated February 22, 2023 does not address criteria within the goals that would demonstrate how pupils become or remain self-motivated, competent, lifelong learners are not included. Response lacks important and key information to be reasonably comprehensive.</p>		✓	P. 28-29
<p>b. List of academic skills and qualities important for an educated person.</p> <p>Broad list of 18 qualities include both academic and nonacademic skills. There is no mention of how these skills are measured/graded from grade to grade nor are they representative of academic skills or qualities.</p> <p><input checked="" type="checkbox"/> Petition response to clarifying question: Satisfied; Written response submitted 2/22/23 indicates development of a rubric.</p>	✓		P. 28-29
<p>c. List of general nonacademic skills and qualities important for an educated person.</p> <p>Broad list of 18 qualities include both academic and nonacademic skills.</p>	✓		P.28-29
<p>4. How Learning Best Occurs/Instructional Design, including subgroup program (CCR 11967.5.1. (f)(C))</p>			
<p>a. A framework for instructional design that is aligned with the needs of the students that the charter has identified as its target student population.</p> <p>Petition includes a clear description for the Healthy Brain Framework including curriculum, standards, and research for the science of resilience. Additionally, the petition provides information on the core academic areas and curriculum. There is, however, no indication as to how these skills will be measured or evaluated. While the petitioner provided framework charts on pages 34, 35 and 36, 37, they do not inform the reader how the “skills of resilience” are functioning or practically demonstrated by students across grade levels or what is “mastery” of a skill. For example, “Coping Skills” is listed across 4 grades; the specific skills/competencies of this skill is not detailed.</p>		✓	P. 32-45, P. 54-56

<p>While page 53 provides a brief explanation about the integration of resilience into each subject matter content, there is otherwise no nexus between the core and resilience to support this statement. Additionally, there is no specific grade and age band expectancies.</p> <p><input type="checkbox"/> Petitioner response to clarifying question: Not satisfied; Written response dated February 22, 2023 lacks key information needed to be comprehensive or measurable and that it is specifically aligned for the intended target population.</p>			
<p>b. Description of learning setting (e.g., site-based matriculation, independent study, tech-based).</p> <p>Petition indicates the learning setting is on campus, in person.</p>	✓		P. 27, 44, 46, 51, 57, 58
<p>c. Instructional approaches and strategies school will use that will enable the school's students, including subgroup populations such as English language learners (ELL), to master the content standards for the core curriculum areas adopted by the State Board of Education.</p> <p>Petition states a hybrid instructional approach including teaching centered learning, Project-Based Learning, and experiential learning. Petition notes a variety of instructional strategies including strategies specific for the English Learner (EL) population. Also noted was that EL students will receive EL services during "advisory."</p> <p>Page 96, Action 1 includes notation of a performance-based learning program to demonstrate proficiency on outcomes. This is the first and only time noted for the use of this instructional approach.</p> <p><input checked="" type="checkbox"/> Petitioner response to clarifying question: Satisfied; written response February 22, 2023.</p>	✓		P. 16, 17 P. 52, 54 P. 57, 58
<p>d. Process for developing or adopting curriculum and teaching methods.</p> <p>Healy School plans to select curriculum and evaluate programs based on specific factors included in the petition.</p>	✓		P. 31, 43
<p>e. How the charter school will identify and meet the needs of students with disabilities, ELL students, students who are achieving substantially above or below grade level expectations, and other special student populations (EC 52052 (a)(2)).</p> <p>The description demonstrates understanding of the likely ELL population.</p> <p>Includes sound approach to identify and meet the needs of subgroup populations.</p> <p>Petition includes a description of how they will identify students that require additional supports and interventions, such as students with disabilities, multilingual learners, etc.</p>	✓		P68-71, P. 74-76 P. 200

The petition identifies the means to meet the academic needs of students with disabilities, English Learners (EL), and students who are achieving above or below grade level including the referral process for special education.

Petition includes an approach to identify and meet needs of subgroup populations. However, the description lacks details sufficient to determine the needs of EL students and other numerically significant subgroups would be adequately met.

The petition describes an anticipated EL population of fifteen percent matching the district average, however this is not consistent with the student population for southeast/southwest Novato identified as the target enrollment area in the petition. (See question 1 of Element G). It is therefore reasonable to assume the percentage of English Learners would exceed 15%. The petition does not clearly identify how the students (including those that have been reclassified fluent*) will be monitored beyond an annual formal assessment, the process for determining the amount of EL services both designated and integrated and where in the schedule of the day EL support will be provided, so as not to disrupt other activities and interrupt their access to a broad course of study.

The petition does not include a meaningful path that would outline how it will measure the overall performance of the significant subgroups (defined as 30+ students) For the target area, this would specifically include English Learners, African American, Hispanic, Socioeconomically disadvantaged, students experiencing homelessness, and students with disabilities.

*Reference Question 1 of Element B.

- ☐ Petitioner response: **Not satisfied**; written responses dated February 22, 2023 provides no further clarity regarding the monitoring of English Learners who have been reclassified.

The petition does not adequately demonstrate that there is a clear understanding and process for the education of English Learners. The petition lacks details such as how it will determine time and frequency of needed support, support needed for reclassified English Learners, the amount of support that will be needed to participate in project-based learning, and systems for monitoring beyond the English Language Proficiency Assessments for California (ELPAC).

The Petition states English Learner Development to be provided during advisory. This would mean that EL students do not receive advisory and limit their access to the broad course of study.

The February 22, 2023 clarification also does not include information as to how EL students will access advisory if advisory time is used for additional EL services.

The Petition lacks specific information related to supports, goals, and measurable outcomes for numerically significant subgroups the

Charter is likely to serve given the stated targeted area of operation.			
<p>f. Special education plan including, but not limited to, the means by which the charter school will comply with the provisions of EC Section 47641</p> <p>The petition indicates that the Charter hopes to become part of the El Dorado County Charter SELPA and will provide evidence of membership upon acceptance.</p> <p>If the Charter does not gain membership in a SELPA for its first year of operation, the Petition states it shall be categorized as a “school of the district” for special education purposes and will seek membership of a SELPA in year two.</p> <p>The petition notes that special education services will be provided in an inclusion model, however specific information or a description as to how this will be implemented is not included.</p> <p><input checked="" type="checkbox"/> Petitioner responses: Satisfied; written response dated February 22, 2023 provides additional information on inclusion model.</p> <p>Petition does not consistently represent complete and accurate procedures in the descriptions in this area, however does note that the Charter will follow all state and federal laws related to the provision of special education services and all SELPA policies and procedures, including the use of appropriate SELPA forms.</p>	✓		P. 76-89
<p>g. A plan for professional development that aligns with the charter school’s proposed program.</p> <p>School includes a plan for professional development. The petition states, “a specific calendar will be created once board member training and faculty are hired.” For now, the petition includes a list of options.</p>	✓		P. 30-32 P. 87
5. Materials, Including Technology			
<p>a. How staff’s and students’ technology resources are aligned with the instructional program and meet state assessment requirements.</p> <p>All students connected with Chromebook. Tech support for students or staff was not indicated. The majority of core content curriculum has an online component.</p>	✓		P. 30, 96
<p>b. What materials are available to students; student-to-computer ratio appears reasonable.</p> <p>Petition states all students will receive a computer with loaded curriculum. Chromebooks for each student are listed as one to one in their Contingency plan.</p>	✓		P. 30, P. 91, P. 96

<p>c. A description or plan for providing adaptive technology for special education students.</p> <p>Adaptive technology is mentioned in the school goals State priority #2, section Action 3.</p>	✓	P. 96
<p>d. Common Core technology standards, digital assessments, and professional learning.</p> <p>Did not find evidence of Common Core Technology standards, digital assessment, and professional learning.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response February 22, 2023 provides clarification.</p>	✓	P. 102-105 P. 30
6. Annual Goals (EC 52064)		
<p>a. Annual goals for all pupils and for each subgroup of pupils identified pursuant to EC Section 52052 that apply to the grade levels served.</p> <p>LCAP goals for state priorities are listed.</p>	✓	P. 93-101
<p>b. Goals tied to state priorities listed in EC Section 52060(d) and LCAP, as appropriate.</p> <p>Additional priorities related to unique aspects of the proposed charter school program include goals and specific annual actions.</p> <p>LCAP goals, actions and measurable outcomes are listed in the petition. Some of the outcomes are not measurable or compared solely to “at or above district level”. These lack specificity and it is unclear how students will be moved from grade to grade and how they will measure growth. Please see Questions 1 & 2 of Element B.</p> <p>Petition includes goals tied to the 8 state priorities. However, the lack of substantive detail related to goals is addressed in B1 & 2.</p> <p>The petition references the resilience studies courses broadly in Goal aligned with State priority 7 specific to receiving a broad course of study that includes resilience curriculum. As a goal in combination with the associated action (monitoring student programs) was noted as specific and lacking in definition.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response 2/22/23 indicates Resilience Studies rubric will be developed. However, it is unclear how a rubric is a goal and how specific annual actions will be addressed.</p>	✓	P. 93-101
<p>c. Specific annual actions designed to achieve the stated goals.</p> <p>The petition annual actions are a mixture of specific and shorter term annual action with the majority of the actions being more broad in nature and description.</p>	✓	

7. Description Requirements for Charter Schools Serving High School Students (EC 47605(b)(5)(A))			
a. How parents will be informed about the transferability of courses to other public high schools.	NA		
b. How parents will be informed about the eligibility of courses to meet college entrance requirements.	NA		
c. How each student will receive information on how to complete and submit the Free Application for Federal Student Aid (FAFSA) or California Dream Act Application at least once before the student enters grade 12.	NA		
d. How the exit outcomes will align with mission, curriculum and assessments.	NA		
e. Affirmation that all students will have the opportunity to take courses that meet the University of California's A-G requirements.	NA		
Comments by review team:			
B. Measurable Student Outcomes			
Evaluation Criteria: EC 47605(c)(5)(B)	Evaluation Standard Met		Located on Page(s)
THE PETITION DESCRIBES, AT MINIMUM	YES	NO	
<p>1. Measurable pupil outcomes for all groups, i.e., specific assessment methods or tools listed for each exit outcome (EC 47607).</p> <p>Assessments are listed and the analysis of student group data are described in petition with grade level. This includes a timeline or timing of when they occur across the academic year.</p> <p>Charter will serve students TK-2 in the first two years. The petition provides only one assessment measure for the students it will be serving in its first two years with no assessment measure for TK. There are no listed assessments (formal or informal) for Science and History.</p> <p>Assessment tools are included, however, there is no breakdown of the anticipated measurable outcomes (the knowledge and skills that student groups will have obtained or mastered) for all students, including English Learners, Students With Disabilities and Foster/Homeless subgroups are not specifically identified.</p>		✓	94-101; 102-104

<p>Outcomes for each assessment tool are not provided.</p> <p><input type="checkbox"/> Petitioner response: Not satisfied; written response dated February 22, 2023 (below) provides additional information and notes that it will select an appropriate measure to assess outcomes for each student group. The Petition lacks specific information related to measurable outcomes for numerically significant subgroups the Charter is likely to serve given the stated targeted area of operation.</p>			
<p>2. A description of how pupil outcomes align with the state priorities consistent with the Local Control and Accountability Plan (LCAP), as described in EC 52060(d), that apply for the grade levels served or the nature of the program.</p> <p>The Petition uses the 8 priorities of the LCAP as an anchor to align their outcomes. While there are measurable outcomes aligned to each “goal” they do not reflect the charter's mission - they are a direct correlation to the state priority and lack depth and connectivity to the uniqueness to the charter.</p> <p>The academic goals do not appear to focus on the TK-2 grade levels who will be served in year 1.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 states that the Charter will craft their LCAP plan to ensure specific actions, support achievement of goals, and greater understanding of student outcomes.</p>	✓		94-101
<p>3. Specific annual actions designed to achieve the stated goals.</p> <p>Petition provides actions for each LCAP goal that will be reviewed and updated annually. The goals overall are not observed as specific but the actions that are associated with them have some specificity to them in combination with some that are broad and not measurable and lacking growth determinants.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023</p>	✓		95-101
<p>4. Additional school priorities related to unique aspects of the proposed charter school program, with goals and specific annual actions.</p> <p>While a list of priorities has been referenced/listed related to the unique charter program - there is broad mention of resilience in goals 3, 7 and 8 with no specific actions that establish the nexus between the Healy School framework (unique aspects of the charter) and the achievement of the goals. The petitioner has identified the area in which she would like the charter to be of greatest benefit. This area/school has a defined student population and demographic. It is anticipated that the petition would have been able to provide more information as it pertains to the anticipated goals and associated</p>		✓	100, 97

actions of potential students given known information.			
<input type="checkbox"/> Petitioner response: Not Satisfied ; written response dated February 22, 2022 (below) clarifies that exit outcomes are included in the description of the resilience curriculum. However, no clear school priority in the goals with specific actions that establish the nexus between the Healy School framework and the achievement of the goals has been identified.			
<p>5. Description of how pupil outcomes will address state content and performance standards in core academic areas.</p> <p>Page 98 of the Petition includes the measurable outcome for State Priority #4 "65% or more of HS students will meet or exceed the standards in Math and ELA per the CAASPP. This outcome will be applicable in year 2 of charter programming due to the grade level of students.</p> <p>The petition seems to respond most specifically to the state content and performance with very little deviation into their program and its unique aspects. This reviewer is seeing very little measurement or outcome data of the program beyond the required boiler plate language in the LCAP.</p> <p>Report cards are noted, utilizing a 4 point scale. However it is unclear what the 4 point scale is and if it addresses state content and standards.</p>	✓		98 p.104
<p>6. Description of how exit outcomes align with the mission and instructional design of the program.</p> <p>The petition does not reflect measurable factors that indicate a student has mastered/met/achieved The Healthy Brain standards. Outcome measures in general are missing from the petition.</p> <p><input type="checkbox"/> Petitioner responses: Not Satisfied; Written response dated February 22, 2023 (below) indicates development of a rubric. The petitioner has not demonstrated clearly how students will progress through curriculum, beyond a list of assessment tools and the standards for the Healthy Brain.</p>		✓	100 95
<p>7. Description or affirmation that benchmark skills and specific classroom- level skills will be developed.</p> <p>The petition provides a list and description of assessments and a frequency for when students will be assessed based upon the measure. Additionally the petition asserts that regular data analysis will occur throughout the year.</p> <p>There is nothing specific that would reflect benchmark skills and specific classroom level skills will be developed beyond content level skills by grade level and the indication about how students will progress from one grade to the next.</p>	✓		44, 48- 52;104

<input checked="" type="checkbox"/> Petitioner responses: Satisfied ; Written response dated February 22, 2023.			
<p>8. Schoolwide student performance goals students will achieve over a given period of time, including projected attendance levels, dropout percentage, and graduation rate goals.</p> <p>The petition describes broadly how students overall will do on a standardized measure. There is no mention of specific performance data across grades, growth determinants, student groups or assessments.</p> <p>There is a timetable and broad mention of group data analysis only. It is anticipated that to meet this measure there would be a level of specificity by group, assessments, etc.</p> <p>The petition does not include a meaningful path that would outline how it will measure the overall performance of the significant subgroups (30+ students) that on the California School Dashboard are persistently underachieving. For the target enrollment area, this would specifically include English Learners, African American, Hispanic, Socioeconomically disadvantaged and, students experiencing homelessness and students with disabilities.</p> <p><input type="checkbox"/> Petitioner response: Not satisfied; Written response dated February 22, 2023 (below) does not fully address this key information.</p>		✓	97-98
<p>Comments by review team:</p> <p>The petition includes certain data specific to Novato and Novato subgroups. However, evidence that the data is utilized to develop specific goals and outcomes for the Charter is not found. The response to suspension and expulsion points to provision of interventions for the student. However, there are no references made to environmental and staff engagement strategies that lend themselves to significantly influence a student's discipline experience.</p>			
C. Student Progress Measurement			
Evaluation Criteria: EC 47605(c)(5)(C)	Evaluation Standard Met		Located on Page(s)
THE PETITION DESCRIBES, AT MINIMUM	YES	NO	
<p>1. Assessment tools that include all required state and federal assessments (e.g., SBAC, ELPAC) for purposes of accountability.</p> <p>The Petition lists state and federal assessments.</p> <p>*A dropout percentage rate is not listed. This information is not considered substantive in nature in order to meet the evaluation standard.</p>	✓*		102-104

<p>2. At least one assessment method or tool listed for each of the exit assessments.</p> <p>A list of assessments was evident in the petition.</p> <p>*The petition does not include any assessment methods for TK. This should be included however, this information is not considered substantive in nature in order to minimally meet the evaluation standard.</p>	✓*		104
<p>3. A variety of alternative assessment tools, including tools that use objective means of assessment consistent with the measurable pupil outcomes.</p> <p>Petition does include alternative assessment tools, such as Galileo Benchmark Assessment, readiness assessments, etc.</p>	✓		104-105;80-81
<p>4. Chosen assessments are appropriate for standards and skills the charter school seeks to measure.</p> <p>Most of the chosen assessments seem to be appropriate for standards and skills that charter seeks to measure. The list of assessments is not extensive but minimally meets this requirement.</p>	✓		102-104
<p>5. A plan for collecting, analyzing, using and reporting student and school performance to charter school staff and to students' parents and guardians, and for using the data continually to monitor and improve the charter school's educational program.</p> <p>The petition states there will be regular data analysis throughout the year via weekly meetings to analyze programs and monitor student progress. The list of assessments provides timing on when assessment will be conducted including progress reports and report cards. Data will also reportedly be shared with board members and the community. The school provides information about participating in the SARC data and LCAP as a means of accountability.</p> <p>It is noted that the report card will utilize a 4-point rating scale. However, it is unclear what the scale is based upon. The petition also mentions A-G requirements. It is unclear why this is relevant to a K-5 school.</p> <p>☑ Petitioner response: Satisfied; written response dated February 22, 2023 describes the report card in further detail and indicates the A-G requirements are not directly relevant. While unclear as to why they would be included in this petition for a TK-5 school, the evaluation standard for this question is met.</p>	✓		104-105

Comments by review team:

D. Governance Structure

Evaluation Criteria: EC 47605(c)(5)(D)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
1. Evidence of the charter school's incorporation as a nonprofit benefit corporation.	✓		Appendix 7
a. Provides the names and relevant qualifications of all persons whom the petitioner nominates to serve on the governing body of the charter school. (EC 47605(h)).	✓		p. 108
b. Includes a set of bylaws and basic policies.	✓		p. 219
2. Evidence that the organization and design of the governance structure reflect the following: A seriousness of purpose to ensure that the charter will become and remain a viable enterprise. Understanding and assurance of compliance with open meeting requirements (the Brown Act, Political Reform Act, Government Code 1090, and the Corporations Code, including the Nonprofit Integrity Act). While the "appeal letter" represents that the charter school will comply with Government Code section 1090, as applicable to charter schools, that representation is not embedded in either the petition or its appendices. *This could be satisfied through terms of a successfully negotiated MOU.	*		p. 111, 221
3. Key features of governing structure including, but not limited to, the following:	✓		
a. Delineation of roles and responsibilities of the governing board and staff.	✓		
b. A clear description of the flexibility and level of autonomy the charter school has from the charter management organization over budget, expenditures, personnel, and daily operations. As per paragraph 1 & 2 of page 182, Healy School will provide its own administrative services or purchase from an appropriately qualified	✓		

third-party contractor.			
<input checked="" type="checkbox"/> Petitioner response: Satisfied ; written response dated February 22, 2023			
c. Size and composition of board, board committees and/or advisory councils.	✓		p. 107-111, 221-224
d. Method for selecting initial board members and election or appointment of replacement board members.	✓		p. 216-235
4. A process for involvement or input of parents and guardians in the governance of the charter school, including the following:			
a. A clear delineation of roles and responsibilities of parent councils, advisory committee and other supporting groups.	✓		p.110-111
b. A description how it shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance to or continuation at the charter school.	✓		p. 112-113

5. Specific policies and internal controls that will prevent fraud, embezzlement and conflict of interest, and that ensure the implementation and monitoring of those policies. Review found no evidence that this petition addresses internal controls designed to prevent fraud, embezzlement, and conflicts of interest. <input type="checkbox"/> Petitioner response: Not satisfied ; written response dated February 22, 2023 (below) indicates that policies are being developed and adopted, to date, no such draft has been submitted for review.		✓	
6. A description and frequency of board trainings and workshops.	✓		P. 111
7. Other important legal or operational relationships between the charter school and granting agency. *Satisfactory completion of the MOU will be necessary before this element fully meets the evaluation standard.	*		

Comments by review team:

E. Employee Qualifications

Evaluation Criteria: EC 47605(c)(5)(E)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			

<p>1. Core and college preparatory teachers, and affirms all teachers will hold appropriate Commission on Teacher Credentialing certificates (EC 47605.4)</p> <p>Petition states that all teachers will meet the State of California certification requirements for instruction in charter schools.</p> <p>Teacher qualifications notes, "CLAD/BCLAD if ELD teacher" (page 122); however, English Learner students won't be served solely by an ELD teacher. Students would be served by the general education teacher and possibly other teachers, such as a special education teacher. If one or more of the students in the class needs English learner services or requires specially designed academic instruction (SDAIE) in a subject area, the teacher providing the English learner services must hold an appropriate English learner certificate or authorization. Therefore ALL teachers are required to be CLAD/BCLAD certified.</p>		✓	8, 122-125, 201 63: TK teacher
<p>2. Those positions that the charter school regards as key and for which it specifies additional qualifications, responsibilities and accountability.</p> <p>Petition identifies the following key positions: School Director, Principal, Office Manager, Office Assistant, School Finance Manager, Teachers, Special Education Teacher, and School Counselor. The petition includes additional qualifications, responsibilities, and accountability of these positions.</p> <p>School Director is noted in Element 10: Student Suspension and Expulsion to hold responsibilities in this area. No indication of this responsibility is found in the job duties for this position on pages 116-117. Student discipline responsibilities should be included in the job duties.</p> <p>School Counselor requirements include School Counseling Credential, although the specific credential(s) which may be acceptable to meet this requirement are not included. Job duties include providing mental health services (p. 124). Petition does not specify whether this includes provision of Educationally Relevant Mental Health Services (ERMHS) should this service be identified in any student Individual Education Programs (IEPs).</p> <p>Finance manager does not begin until year 3 of the proposed operations. It is unclear who will perform the Finance Manager's role for the first two (2) years.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied*; written response notes that the credentialed school counselor will provide ERMHS, as necessary. *Appropriate credential, consistent with SELPA guidelines, required to conduct ERMHS assessments.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 notes that general education teachers who are serving</p>		✓	p.115-125 p.201

<p>English Learners will hold an appropriate credential.</p> <p><input type="checkbox"/> Petitioner response: Not Satisfied; written response dated February 22, 2023 notes:</p> <p>While we are aware that small charter schools can operate with back-office support through volunteers, the petitioner did not identify any volunteers with the requisite knowledge, skills and experience to serve in this capacity.</p> <p>Overall review indicates petition has minimally met requirements to describe positions that the charter school regards as key and for which it specifies additional qualifications, responsibilities and accountability.</p>			
<p>3. General qualifications for the various categories of employees (e.g., other administrative, instructional support, non instructional support). These qualifications shall be sufficient to ensure the health and safety of the charter school's faculty, staff and students.</p> <p>It is noted that the Office Manager will be familiar with the school meal options and, with the help of the Office Assistant, will manage student records and health. However, as noted in the Health and Safety element review, we are unable to find any indication of staffing to monitor and implement practices consistent with relevant education codes & regulations (nutrition services, immunizations, vision and hearing screening, medication administration, specialized health care plans, etc.) until the third year of proposed operations.</p> <p><input type="checkbox"/> Petitioner response: Not Satisfied; written response dated February 22, 2023. While the Director can fulfill many of the responsibilities related to administering and monitoring the health and safety policies, Directors are typically not qualified to administer vision and hearing. This support is not seen in the budget for year 1, is in other classified in year 2, and contracted services begin in year 3.</p>		✓	p. 198: Appendix 3: Staffing Plan for Years 1-5 P. 114-122
<p>4. A clear plan for recruitment, selection, development and evaluation of staff and charter school leaders.</p> <p>Action steps for recruitment & selection are identified, however, specific details are limited (e.g. "posted" but no indication as to how or where).</p> <p>There is discussion of background clearances via fingerprinting (DOJ), but it does not identify it as part of a contingent employment offer discussed in the hiring process (p. 115). Similarly, there is discussion (p. 115) of having candidates teach a class before employment is offered.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response 2/22/23 notes</p>	✓		p.114-115, P. 126

specific strategies that will be utilized.			
5. Roles and lines of authority for board and management positions. The Duties of the Board of Directors are outlined on page 110.	✓		P. 110, 116
6. Qualifications for non-core, non-college-prep teaching positions staffed by noncertified teachers. No positions for non-core teachers are identified in the petition.	n/a		P. 119-121
7. Proposed teacher-to-student ratio. The Budget Narrative includes a teacher-to-student ratio. Transitional Kindergarten teacher-to-student ratio is identified as 10:1, contingent upon an appropriation of funds for this purpose (p. 63). The teacher to student ratio is stated to be 24:1 in the Budget Narrative (p. 199). <input checked="" type="checkbox"/> Petitioner response: Satisfied ; written response dated February 22, 2023 provided clarification.	✓		p. 63 p 199
Comments by review team:			

F. Health and Safety Procedures

Evaluation Criteria: EC 47605(c)(5)(F)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
1. A comprehensive charter school safety plan, and assurance that all charter school staff will be trained on this plan and that the plan will be updated annually. Petition describes all the required elements to be included in a school safety plan, however, a safety plan itself is not yet provided. Charter Petition describes adoption of comprehensive school safety plan requirements, including annual update and references appropriate Education Code, and coordination.	✓		126-131

<p>2. Assurances that the charter school will require a criminal background clearance report and proof of tuberculosis examination prior to employment.</p> <p>Petitioner documents the necessary assurances for criminal background clearances and proof of tb prior to employment.</p>	✓		126, 127
<p>3. Assurances that the charter school will adopt procedures to prevent acts of bullying and cyberbullying, and make the California Department of Education (CDE) online training module available to all employees who interact with students.</p> <p>Petitioner describes adoption of procedures and online training module and references appropriate Education Code.</p>	✓		129
<p>4. Affirmation that charter schools with grades 7-12 will adopt a suicide prevention policy.</p> <p>Policy must be adopted in conjunction with a variety of stakeholders and must address the needs of specifically high-risk groups.</p> <p>Petitioner defines Healy School as elementary grades only, therefore this criteria is non applicable.</p>	n/a	n/a	Not applicable
<p>5. Health and safety practices for students and staff. Health and safety policies and practices should include, but not be limited to, the following:</p> <p>Mandated child abuse reporting.</p> <p>Natural disasters and emergencies, including seismic safety (structural integrity and earthquake preparedness).</p> <p>Required immunizations, vision, hearing and scoliosis health screenings, and administration of medications to the same extent as would apply if the students attended a noncharter public school.</p> <p>Staff training on emergency and first aid response (e.g., epi pen usage, defibrillator)</p> <p>Notification to students, parents and guardians on how to access student mental health services on campus and/or in the community</p> <p>Assurances that in grades 6-12, if applicable, the charter school identifies the most appropriate method of informing parents and guardians of human trafficking prevention resources.</p> <p>The Petition includes several of the required criteria within this section, but not all and it is not clear as to who will monitor and administer requirements of referenced codes.</p>		<p>p. 128</p> <p>p.129</p> <p>✓ p.127</p>	

<ul style="list-style-type: none"> • Within the natural disasters section the Petition is missing “including seismic safety”. • Notification to students, parents and guardians on how to access student mental health services is not included. Currently, this information is narrowed to students who identify on the LGBTQ+ continuum and/or special education. Petition is missing more information about how the entire student population and parents/guardians will receive notice. AB 2022 and Ed Code 49428 requires that parents/guardians of all students receive notice annually. <p><input type="checkbox"/> Petitioner response to clarifying question: Not Satisfied; response dated February 22, 2023.</p>			
<p>a. references include health- and safety-related policies and procedures or the date by which they will be adopted and submitted to the authorizer.</p> <p>The Petitioner has included references to the health and safety policies and procedures.</p>	✓		126
<p>6. Assurances regarding compliance with the Americans with Disabilities Act (ADA).</p> <p>The Petitioner includes assurances for compliance with ADA.</p>	✓		126

Comments by review team:

G. Racial and Ethnic Balance

Evaluation Criteria: EC 47605(c)(5)(G)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
<p>1. Specific practices and policies the charter school will design and implement to attract a diverse applicant pool and enrollment that reflects the general population, including special populations that reside within the district's territorial jurisdiction.</p> <p>The Petition states that it will strive, through recruitment and admissions practices, to achieve a balance of racial and ethnic students, special education students, and English learner students, including redesignated fluent English proficient students among its students that is reflective of the general population residing within the territorial jurisdiction of the District.</p>	✓		p. 132-234;

<p>Description places heavy emphasis on Spanish language access. Details related to students with disabilities and cultural diverse populations are not represented in the description. Also, staff representation is not addressed/included. No other effort to try to identify other populations is noted.</p> <p>In the admissions policies, staff children are given enrollment preference (1) in a random drawing with no reference in the petition found related to ensuring attracting a diverse applicant pool in recruitment strategies.</p> <p>Incomplete recruitment attraction policy. The practices are specific, but they do not appear to attract the diverse applicant.</p> <p>The Charter enrollment projections indicate the Charter expects to attract 16% EL, 63% low income, for a total unduplicated count of 63%. However the district as a whole serves 17% EL and 35% low income, for a total unduplicated count of 38%. This doesn't appear to be reflective of the district as a whole.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023</p>			
<p>2. Practices and policies appear likely to achieve racial and ethnic balance.</p> <p>The petition notes that the Charter will strive to achieve racial and ethnic balance. However, as noted above, there is a lack of information reflective of culturally and racially diverse balance as well as specific information about diversity, equity, and inclusion practices or policies.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 notes the Charter School has a DEI policy that will communicate with students and families their desire to serve all. The written response includes specific outreach strategies.</p>	✓		p. 132-234;
<p>3. The outreach strategies, which identify specifically who the targeted groups will be and include developed or planned benchmarks for achieving balance.</p> <p>No benchmarks provided. It will be reviewed annually but without any specific means or direction.</p> <p><input type="checkbox"/> Petitioner response: Not Satisfied; written response dated February 22, 2023 notes specific strategies (see response above in G2). However, it does not include developed nor planned benchmarks to evaluate the effectiveness of said strategies.</p>		✓	p. 132-234;

<p>4. Types of supports that will be provided to maintain enrollment balance (e.g., counselors, support staff, medical-related staff).</p> <p>Limited information is found. Support staff noted in the EL section, however, there is no job description included as a key position to review. School Counselor duties do not explicitly address this area. Pg. 29 includes a Diversity, Equity, and Inclusion Policy and notes a commitment to align with NUSD's equity imperative. Additional and specific information about diversity, equity, and inclusion practices or policies that would demonstrate supports for a diverse population and maintain enrollment balance are not found.</p> <p><input type="checkbox"/> Petitioner response: Not Satisfied; written response dated February 22, 2023 notes the Charter School seeks to hire a bilingual counselor and office manager and "... providing immigrant students with buddies who can help them assimilate...". The written response also states there is a continuous improvement value and through soliciting feedback Healy School will make improvements. What is not included is information about racial or ethnic representation nor individuals with disabilities. The written response states a desire to "hire diverse faculty and staff" yet specified this to be a bilingual counselor and office manager only. Additionally, there is nothing about the curriculum representing diversity, family engagement to celebrate/express value of cultural, linguistic, racial, ability diversity.</p>		✓	
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Comments by review team:

H. Admissions Policies and Procedures, If Applicable

Evaluation Criteria: EC 47605(c)(5)(H)	Evaluation Standard Met		Located on Page(s)
THE PETITION DESCRIBES, AT MINIMUM	YES	NO	
<p>1. The following assurances: The charter school shall be nonsectarian in its programs, admission policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate against a pupil on the basis of disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, equal rights, and opportunities in the educational institutions of the state.</p>	✓		135 and page 132 p. 8 Assurances

Petition contains assurances consistent with the above requirements.			
<p>2. A clear description of admission policies that meet the state and federal permissive preferences.</p> <p>Admission policies as stated in the petition are consistent with state and federal permissive preferences.</p>	✓		135
<p>3. A clear description of how students in the community will be informed and given an equal opportunity to attend the charter school. All promotional material must clearly state the charter school will serve ALL students.</p> <p>Not explicitly stated in this element and no materials were included in the charter petition.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 affirms all material on the website, print, online, and in-person communications state that the Charter will be open to all students.</p>	✓		133
<p>4. Proposed admissions and enrollment requirements, process and timeline, which include the following:</p> <p>The proposed admissions and enrollment requirements are noted, as well as a general process. However, there is not an explicit timeline for the lottery. Petition states, “in the spring”.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 notes an anticipated lottery process, if needed, to begin first week of May 2023 for the first year of operation.</p>	✓		136 and 137
<p>a. Information to be collected through the interest form, application form, and/or enrollment form.</p>	✓		136
<p>b. Assurances that enrollment preferences will not require mandatory parent volunteer hours as a criteria for admission.</p> <p>Assurances included.</p>	✓		135
<p>5. Description of the public random drawing processes that comply with state and federal laws.</p> <p>Petition states that the preferences will be consistent with Ed Code and applicable federal law.</p> <p>The petition states that the Charter School will hold a public random drawing (i.e., a lottery) to determine admission for the impacted grade level, with the exception of existing students in good standing, who are guaranteed admission in the following school year. However does not state what it means to be a student “in good standing” (p. 137)</p> <p><input checked="" type="checkbox"/> Petitioner responses: Satisfied; written response dated February 22, 2023 states “in good standing” indicates a student was enrolled in the prior year.</p>	✓		137

<p>6. Assurances that preferences, if given, are not likely to negatively impact the racial, ethnic and unduplicated pupil balance the charter school strives to reflect.</p> <p>This specific assurance is not found, however p. 137 states that the preferences are consistent with Ed Code and applicable federal law.</p> <p>Children of Healy School employees are given enrollment preference (1) in a random drawing with no reference in the petition related to ensuring attracting a diverse applicant pool in recruitment strategies.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 includes Charter's assurance.</p>	✓		
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Comments by review team:

I. Annual Independent Financial Audits

Evaluation Criteria: EC 47605(c)(5)(I)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
1. The manner in which the audit will be conducted.	✓		p 140
2. Procedures to select and retain an independent auditor, including: Qualifications that will be used for the selection of an independent auditor, Assurance that the auditor will have experience in education finance.	✓		p 140
3. Assurance that the annual audit will employ generally accepted accounting principles.	✓		p 140
4. Scope and timing of audit, as well as distribution of completed audit to authorizer, county office, State Controller, California Department of Education, and/or other agencies required by law.	✓		p 140
5. A process and timeline that the charter school will follow to address any audit findings and/or resolve audit exceptions.	✓		p 140

6. Assurance that the charter school will satisfy any audit deficiencies to the satisfaction of the authorizer.	✓		p 140
7. Who is responsible for contracting with and overseeing the independent audit.	✓		p 140

Comments by review team:

The charter fully understands they need to select an auditor. They have met the standard here in this section.

J. Suspension and Expulsion Procedures

Evaluation Criteria: EC 47605(c)(5)(J)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
1. A process for suspensions of fewer than 10 days, including the following:			156-157
a. Oral or written notice of the charges against the pupil.	✓		156-157
b. If the pupil denies the charges, an explanation of the evidence that supports the charges.	✓		156-157
c. How an opportunity will be provided for the pupil to present a rebuttal to the charges. Petition states that "if possible" parents/guardians will be offered a conference prior to the suspension decision and during this "if possible" conference the student would be given the opportunity for rebuttal of the charges. If the conference is in fact not held, because the Petition indicates "if possible," the student thereby does not have an opportunity to rebut the charges. <input type="checkbox"/> Petitioner response: Not satisfied ; written response dated February 22, 2023 notes this is on page 160, however this page describes expulsion proceedings and not the process for suspensions of fewer than 10 days.		✓	156 to top of 157
2. A process for suspensions of 10 days or more and all other expulsions for disciplinary reasons, including the following:			
a. Timely, written notice of the charges against the pupil and an explanation of the pupil's basic rights. Petition notes the "At the time of suspension, School Director... shall make a reasonable effort to contact the parent or guardian by telephone or in person" when there is a suspension. This does not provide information about timely written notice regarding suspension. Specific to expulsions, the Petition states parent or guardian will		✓	

<p>receive notice of expulsion hearing 10 days prior to the hearing date. This does not specify timely notice to the parent or guardian of the discipline enacted prior to the hearing date.</p> <p><input type="checkbox"/> Petitioner response: Not Satisfied; response dated February 22, 2023 notes the petition's inclusion of Governing law on page 142. However the description of the process of how governing law will be applied specific to suspensions of 10 days or more and all other expulsions for disciplinary reasons in the petition does not include timely written notice of charges against the pupil as noted above.</p>			
<p>b. A process of hearing adjudicated by a neutral officer within a reasonable number of days, and to which the pupil has the right to bring legal counsel or an advocate.</p> <p>Did not locate reference to the right to bring legal counsel or advocate other than for witnesses of sexual assault and battery (page 160)</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 provides clarity in identifying this in the petition.</p>	✓		partial page 159, 160
<p>3. A clear statement that no pupil shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the pupil has been provided with written notice, and that ensures the written notice shall be in the native language of the pupil or the pupil's parent or guardian.</p>	✓		144
<p>4. Understanding of relevant laws protecting constitutional rights of students.</p> <p>Petitioner's understanding of relevant laws should indicate that their proposed lists of offenses and procedures provide adequate safety for pupils, staff and visitors to the school, and serve the best interests of the school's pupils and their parents and guardians.</p>	✓		143
<p>a. Provides for due process for all students and demonstrates understanding of the rights of students with disabilities, in regard to suspension, expulsion and involuntary dismissal.</p>	✓		143
<p>b. Explanation of how authorizer may be involved in disciplinary matters.</p> <p>Petition states notification of recommendation of expulsion to the authorizer</p>	✓		163

Comments by review team:

Expulsion procedures include a hearing before an administrative panel consisting of at least three (3) members who are certificated and neither a teacher of the student nor a Board member (p.159). It is unclear how the Charter will adhere to this policy if there are not enough certificated staff to fulfill this procedure.

☒ Petitioner response: **Satisfied**; written response dated February 22, 2023

K. Staff Retirement System

Evaluation Criteria: EC 47605(c)(5)(K)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
1. A statement of what retirement options will be offered to employees Federal Social Security system & 403(b) plan	✓		p 171
a. State Teachers' Retirement System (STRS) (if STRS, then all teachers must participate). N/A - Is not offering at this time	✓		p 171
b. Public Employees' Retirement System (PERS). N/A - Is not offering at this time	✓		p 171
c. Social Security. Offering Social Security & 403(b) only at this time to all employees	✓		p 171
2. Whether retirement will be offered, with language clearly reflecting one of the following choices for each retirement system: Coverage will be offered to eligible employees. The charter school retains the option to elect the coverage at a future date. The charter school will not offer coverage. Offered to All employees. Board of Directors retains option for any others	✓		

3. Who is responsible for ensuring that the appropriate arrangements for coverage have been made.	✓		
The petition identifies the School Director is responsible			

Comments by review team:

L. Public School Attendance Alternatives

Evaluation Criteria: EC 47605(c)(5)(L)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
1. Attendance alternatives for students who reside within the county and choose not to attend the charter school.	✓		p 172

Comments by review team:

M. Post-employment Rights of Employees

Evaluation Criteria: EC 47605(c)(5)(M)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
1. School district employees' return to employment rights, including the following:			P. 173
a. Whether, and how staff may resume employment within the district or authorizer. The petition identifies that the district sets the terms for reemployment, specifically there are no automatic rights of return unless set through agreement with the district.	✓		p. 173
b. The ability to transfer sick and/or vacation leave to and from the charter school and another LEA The petition identifies that sick leave is not eligible to be transferred to	✓		p. 173

<p>the Charter School. The petition does not address what will happen to sick leave “from” (i.e. when an employee leaves) the Charter.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 indicates the Charter will not transfer sick leave when an employee leaves the Charter</p>			
<p>c. Whether staff will continue to earn service credit (tenure) in district while employed at the charter.</p> <p>The petition does not specifically address service credit/ tenure in the district.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023</p>	✓		
<p>2. Whether collective bargaining contracts of the charter authorizer will be controlling documents.</p> <p>The petition does not specifically address whether collective bargaining contracts of the charter authorizer will be controlling documents.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 indicates the collective bargaining contracts of the charter authorizer will not be controlling documents.</p>	✓		

Comments by review team:

N. Dispute Resolution Procedures

Evaluation Criteria: EC 47605(c)(5)(N)	Evaluation Standard Met		Located on Page(s)
	YES	NO	
THE PETITION DESCRIBES, AT MINIMUM			
<p>1. A process for the charter and the authorizer to settle disputes related to the provisions of the charter.</p> <p>The petition outlines the party who claims there is a dispute shall put the issue in writing with specificity and supporting facts and deliver personally or by certified mail. Response to be issued in 20 days, and meeting set within 15 days of written response. Mediation fees are split, costs on either side in resolving the dispute are the responsibility of each respective side.</p>	✓		174-175

<p>2. The process by which the charter will resolve internal complaints and disputes.</p> <p>The petition states that disputes among and between staff, students, parents, volunteers, faculty, and partner organizations will be resolved by the Charter and their policies.</p> <p>No specific process is outlined or sample policies were found in the petition; nor specifics of what these policies may include.</p> <p><input type="checkbox"/> Petition response: Not satisfied; written response dated February 22, 2023 notes a dispute resolution policy is being developed in alignment with other Marin County charter schools. However, no sample policies nor indication of what those policies may cover is included for review.</p>		✓	P. 176
<p>a. Includes Uniform Complaint procedures and a description of how this process is communicated to parents, staff and the community.</p> <p>No local complaint policy that describes the procedures that must be followed to resolve complaints consistent with the California Code of Regulations, Title 5 sections 4600-4694 was found. Nor how the complaint policy would be communicated to parents, staff and the community. Page 130-131 does include a description of the Comprehensive Anti-Discrimination and Harassment Policies and Procedures as well as a description for informing staff and parents. This policy does not cover all aspects of the UCP.</p> <p><input type="checkbox"/> Petition response: Not satisfied; written response dated February 22, 2023 notes a dispute resolution policy is being developed in alignment with other Marin County charter schools. However, no sample policies nor indication of what those policies may cover is included for review.</p>		✓	p. 130-131
<p>3. Acknowledgement that, except for disputes between the chartering authority and the charter school, all disputes involving the charter school shall be resolved by the charter school according to the charter school's own internal policies.</p> <p>The petition states that disputes among and between staff, students, parents, volunteers, faculty, and partner organizations will be resolved by the Charter and their policies.</p>	✓		P. 176
<p>4. Statement that if any such dispute concerns facts or circumstances that may be cause for revocation of the charter, the authorizer shall not be obligated by the terms of the dispute resolution process as a precondition to revocation.</p> <p>The Petition identifies that if the chartering authority believes that the dispute relates to an issue that could lead to revocation of the charter,</p>	✓		P. 176

then both parties will no longer be subject to the dispute process.				
Comments by review team:				
O. Closure Procedures				
Evaluation Criteria: EC 47605(c)(5)(O)		Evaluation Standard Met		Located on Page(s)
THE PETITION DESCRIBES, AT MINIMUM		YES	NO	
1. The procedures to be used if the charter school closes, including the following:				
a. Who is the responsible entity or person that will conduct closure- related activities. Petition states official board action will identify; does not specifically identify the entity or individual responsible for closure activities. <input checked="" type="checkbox"/> Petitioner response: Satisfied ; written response dated February 22, 2023		✓		p 177
b. How the charter will communicate the closure to students, parents and guardians, the authorizing entity, the county office of education, the charter's special education local plan area, the retirement systems in which the school's employees participate, and the California Department of Education. Petition is missing how, only states "promptly". <input checked="" type="checkbox"/> Petitioner response: Satisfied ; written response dated February 22, 2023 minimally meets requirement. However, "how" is not specified in the response.		✓		P. 177
c. Who will conduct the process for the completion and submission of final financial reports, expenditure reports for entitlement grants, and the filing of any required final expenditure and performance reports.		✓		p 178
2. The maintenance plan for pupil records and the manner in which parents and guardians may obtain copies of pupil records if the charter school closes, including how information will be preserved and transferred. Closure notice will include how to request them. Will ask Novato or		✓*		p 177-178

<p>determine an alternative for storage. Does not identify WHO parents will contact other than 'the entity responsible for closure-related activities'</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied*; written response dated February 22, 2023 minimally meets requirements. However, it does not clearly identify the identity responsible for closure identities. *This would need to be further clarified under an MOU.</p>			
<p>3. A process for how the charter will ensure a final audit of the charter school.</p>	✓		p. 178
<p>a. An assurance the audit will be conducted within six months of closure.</p>	✓		p. 178
<p>b. The disposition of the charter school's assets. Petition addresses disposition by referring to the articles of incorporation which merely identify 'a non-profit'</p> <p><input type="checkbox"/> Petitioner response: Not satisfied; written response dated February 22, 2023 does not identify a non-profit organization.</p>		✓	
<p>c. Plans for disposing net assets including at least the following:</p> <p>The disposition of all assets of the charter, including cash and accounts receivable and an inventory of property, equipment and other items of material value.</p> <p>An accounting of all liabilities, including accounts payable and any reduction in apportionments as a result of audit findings or other investigations, loans, and unpaid staff compensation.</p> <p>An assessment of the disposition of any restricted funds received by or due to the charter.</p> <p>Process for the return of any donated materials and property in accordance with any conditions established when the donation of such materials or property was accepted.</p> <p>Petition addresses items listed above however it is a circular reference going back to Articles. Further indicates school could close and non-profit could continue.</p> <p><input type="checkbox"/> Petitioner response: Not satisfied; written response dated February 22, 2023 does not identify a non-profit organization</p>		✓	p. 178-179
<p>4. The transfer and maintenance of personnel records in accordance with applicable law. Unclear who "the entity responsible for closure-related activities in accordance with applicable law"</p>	✓		p. 178

☒ Petitioner response: **Satisfied**; written response dated February 22, 2023

Comments by review team:

Required Supplemental Criteria

Criteria in **RED** indicate descriptions that are required under law to be included in the charter petition.

Criteria in **BLACK** are strongly suggested to be included to ensure that the charter petition is reasonably comprehensive.

Financial and Administrative Plan

Evaluation Criteria: EC.47605(h) For criteria where the evaluation criteria is not met, refer to the Budget Review Workbook and supporting documents ,	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			
1. A first year operational budget:			
a. Annual revenues and expenditures clearly identified by source. 5 year projection provided by contractor ExED (p 180)	✓		p 206-208
b. Revenue assumptions in alignment with applicable state and federal funding formulas. LCFF estimates verified using the projected ADA and unduplicated count provided in the petition. Note assumption includes 63% unduplicated in a district with 37% although we note this is comparable with Southern Novato - however the makeup cited for the charter does not match their demographics for English Learners. See Element 7 for additional questions. If charter enrollment is more representative of the district as a whole, LCFF revenue drops by \$56k Yr 1, \$86k Yr 2, \$118k Yr 3, \$152k Yr 4	✓		p 199-200
c. Expenditure assumptions that reflect the school design plan. Expenditure assumptions are not clearly stated		✓	p 201-205
d. Expenditure assumptions that reflect market costs.		✓	p 199

Assumptions based on local data/rates published by state of California and federal government, however, there are a number of areas in the budget where projected expenses appear understated. See detailed budget review workbook			
<p>e. Revenues from grants or other proposed fundraising that are not essential to fiscal solvency.</p> <p>The proposed budget does not include any grants or fundraising revenues but does indicate the school will be applying for grants</p>	✓		p. 204
<p>f. Minimum reserve level and projected positive ending fund balance (the larger of 3% of expenditures, or \$25,000).</p> <p>Once assessed for risks, it appears the budget will not support a positive ending fund balance</p>	✓		p. 199
<p>g. If expenditures exceed revenues in first year of operation, identifies sources of capital sufficient to cover deficits until the budget is projected to balance.</p> <p>Budget reflects a surplus in all years projected</p>	✓		p 204
<p>h. Expenditures for property and liability insurance that name the district or authorizer as additional insured (and/or a hold harmless agreement).</p> <p>Insurance costs included and appear reasonable</p>	✓		p 181
<p>i. Expenditures for reasonably expected legal services.</p> <p>Paragraph 4 - \$8,000 for 1st year legal in budget</p>	✓		p 204
<p>j. Expenditures for special education excess costs, consistent with current experiences in the school district or county office.</p> <p>The budget appears reasonable for first 2 years however does not appear to fully account for the increase in services likely to occur as the school grows. There is no contingency for any high cost services and the transportation budget appears low.</p>	✓		p 202
<p>k. Expenditures for facilities, or, if specific facilities are not secured, reasonable projected cost.</p> <p>Facility costs appear low for Marin County and 75% of rent expense is offset with projected SB740 revenue. To qualify for this revenue, 55% of the school's population must be identified as low-income which given the</p>		✓	p 203

district's demographics (37% low income) are not guaranteed putting the revenue at risk. Alternatively, the charter can qualify for this revenue stream by locating in an elementary school area with a low-income population equal or greater than 55%. This would confine the charter's location to the Hamilton neighborhood again putting the revenue at risk.			
<p>l. Expenditures for required student meals that meet federal nutritional requirements.</p> <p>Will provide adequate meals that qualify for federal reimbursement. A review of the nutrition budget indicates net cost to the school is likely understated.</p>	✓		p 128
<p>m. The alignment of LCAP expenditures with the charter's budget.</p> <p>The petition does not identify how the LCAP will align with the budget</p>		✓	p.93
2. Financial projections include a clear description of planning assumptions:			
a. Revenues and expenditures in the budget correlate with the number and/or types of students by grade level.	✓		
<p>b. Expenditure assumptions correlate with the number of staff in the budget.</p> <p>Staff salaries are not competitive for this area</p>	✓		
<p>c. Expenditure assumptions correlate with the facility needs in the budget</p> <p>Facility rents appear low compared to market rates. See the supplemental review sheet for facilities and the budget review workbook</p>		✓	
<p>d. Expenditure assumptions in alignment with the overall school design plan.</p> <p>In general the budget aligns with the basic school design, however, assumptions are not clearly stated. Start up costs in general appear understated, curriculum and professional development and computer devices all appear understated and we were unable to find costs associated with providing EL instruction, health and safety in the first two years, or fiscal officer role in the critical first two years of operations, And the budget has no allowance for contingencies.</p>	✓		
e. Revenues based on state and federal funding guidelines	✓		
f. Revenues based on reasonable potential growth in local, state and federal categories.	✓		
<p>g. Revenues based on reasonable student growth projections.</p> <p>Budget reviewed using the student growth projections provided, however, based on the materials provided to support the school's Prop 39 request, the</p>		✓	

enrollment projections appear overstated.			
<p>h. Revenue from sources such as grants, loans, donations and other non-guaranteed funds not necessary for the charter to maintain fiscal solvency.</p> <p>None included outside of SB740</p>	✓		
<p>i. Timeline for any referenced grant applications to be submitted and funded.</p> <p>SB740 eligibility requirements and grant application timeline not identified in the petition</p>		✓	
<p>j. Positive reserves are maintained in all three years.</p> <p>The petition was presented with positive reserves, however, our analysis indicates risks to the budget would likely result in negative reserves</p>		✓	
<p>k. Fund balances are positive, or sources of supplemental working capital are identified.</p> <p>The petition was presented with positive reserves, however, our analysis indicates risks to the budget would likely result in negative reserves</p>		✓	
3. Start-up costs			
<p>a. Reasonable allocation for all major start-up costs, including the following:</p> <p>Staffing</p> <p>Facilities</p> <p>Equipment and supplies</p> <p>Professional services (e.g., food services)</p> <p>Technology materials</p> <p>Assessment systems/materials</p> <p>Legal costs</p> <p>Start up costs do not appear to be addressed fully in the budget and do not appear to include the cost of any staff prior to the start of school. Facility costs and outfitting a facility including leasehold improvements in particular do not appear to be addressed</p>		✓	
<p>b. In alignment with overall school design plan.</p> <p>The petition does not provide sufficient detail about the facility and how the physical space will align with the overall school design plan</p>		✓	
c. Potential funding sources.		✓	

Start up costs not addressed fully. No revenues included for start up.			
d. Timeline that allows for grant applications and fundraising efforts to be completed in time, if included in start-up costs.	✓		
4. Cash flow projections for first three years:			
a. Monthly projection of revenue receipts in line with local, state and federal funding disbursements.	✓		
b. Expenditures are projected by month and correspond with typical or reasonable schedules.	✓		
c. Balance sheet accounts are projected by month.	✓		
d. Show positive cash balance each month and/or identify sources of working capital.	✓		
5. Structure for administrative services and operations			
a. Outline or process for how personnel transactions will be conducted (i.e., hiring, payroll, leaves and retirement). Minimal description of administrative services and operations - Petition states may be performed by school staff or contracted, however budget does not include any contract service costs outside of back office provider		✓	
b. Accounting and payroll processes that reflect an understanding of school business practices and the expertise needed to carry out the required functions. Indicates these functions will be contracted with a third-party however does not provide the process nor timeline to procure such services		✓	
c. Plan and timeline to develop and assemble school business practices and expertise. Does not hire a fiscal officer until year 3 - no indication of who performs role until that time <input checked="" type="checkbox"/> Petitioner responses: Satisfied ; Written response dated February 22, 2023 minimally satisfies requirements.	✓		
d. Explanation of how the school intends to manage risk, including any policies and procedures. Develop P&P in consultation w/insurance carrier/risk mgmt experts. Incorporate into handbooks, review ongoing, train annually.	✓		
e. If operated by a nonprofit organization, an affirmation that it will provide additional 501(c)(3) fiscal reports.	✓		

The petition does not address any additional 501(c)(3) fiscal reports that will be provided.			
<input checked="" type="checkbox"/> Petitioner responses: Satisfied ; Written response dated February 22, 2023			

Back Office Providers

Evaluation Criteria: EC 47605(h)	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			
1. Name of the back office provider and a description of support used by the charter.		✓	
2. Affirmation that the back office provider will provide timely submissions of calendared items by their respective due dates.		✓	
3. Affirmation that the back office provider will provide timely submissions of requests for information.		✓	

Comments by review team:

Healy School will provide its own administration services, page 182. Healy will use a back-office service provider, page 204, but the provider is not named in this section. Page 180, Paragraph 1 mentions use of ExED, who prepared the initial financial information, but page 204 does not list them as the provider nor the information to address #2 & 3 above.

Notes finance director will not be hired until year 3 but does not appear to identify who will perform the higher level functions - strategic planning, risk management, facilities oversight, etc normally performed by a finance manager.

Petition notes Charter will solicit from three known charter back-office providers.

Charter Management Organization (CMO)

(i.e., entities managing charter schools)

Evaluation Criteria: EC 47605(h)	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			
1. Name and relationship of CMO to charter school, including the following: Roles Responsibilities Payment structure Conditions for renewal and termination Investment disclosure	N/A	N/A	
2. CMO's role in the financial management of the charter, and the associated internal controls.			

3. Other schools and/or companies managed by the CMO.			
4. CMO's history, philosophy, and past results operating other schools and/or companies.			
5. CMO's Form 990s for up to prior three years.			
6. Affirmation that the CMO will provide timely submissions of calendared items by their respective due dates.			
7. Affirmation that the CMO will provide timely submissions of request for information items.			

Comments by review team:

Petition does not identify a Charter Management Organization.

Facilities

Evaluation Criteria: EC 47605(h)	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			
1. Location of facility			
<div>a. The types and the location of the charter school facility or facilities that the petitioner proposes to operate, including the following:</div> <div>Size and resources</div> <div>Safety</div> <div>Educational suitability</div> <div>Petition does not list a specific location, nor does petitioner identify size, resources or educational suitability requirements, and describes intent to identify and either purchase or secure a privately owned location in southwest or southeast or Novato. Petitioner does address health and safety plan and disaster preparedness plan to be located on site. Petition states that if unsuccessful in identifying and securing an appropriate space, petitioner states intent to apply to the Novato Unified School District (District) for Prop 39 facilities use by the legal deadline (which is November 1).</div> <div>On November 1, 2022, Petitioner submitted a request to the District to request Proposition 39 Facilities for the 2023-2024 School Year. On December 1, 2022, the District provided objections to the projected Average Daily Attendance (ADA) presented in the Petitioner’s request. Thereafter, on December 31, 2022, Petitioner responded to the District. On February 1, 2023, the District responded to the Charter confirming</div>		✓	pg. 182 - 183.

<p>the rejection to the projected ADA. On February 21, 2023, Petitioner responded to the District with a demand that the District provide a preliminary offer of facilities no later than March 1 2023.</p> <p>Until such time that a facility is identified, the ability to assess appropriateness of the types and the location of the charter school facility or facilities that the petitioner proposes to operate is not possible, including the following: Size and resources, Safety, Educational suitability.</p>			
<p>b. The address of the facility or a schedule for securing the facility, including the person responsible for securing the location.</p> <p>A facility has not been secured, and a schedule for securing the facility is not identified, nor is the person responsible for securing the facility. Petitioner does state that they are actively working with realtors, developers and financiers to identify and secure an appropriate space.</p>		✓	pg. 182
<p>c. Assessment and analysis of anticipated facilities needs and viability of potential sites.</p> <p>As a facility has not been identified and secured, assessment and analysis of anticipated facilities needs are not addressed. Petitioner does state that a health and safety plan and disaster preparedness plan will be created and will follow all requirements once the petition is approved.</p>		✓	pg. 182
2. Current and projected availability			
<p>a. Current and projected availability of each charter school site, and schedule for securing the facility.</p> <p>Petition does not list any locations, however the areas of southeast and southwest Novato are identified as the desired area. There is no schedule listed related to when the facility would be secured.</p>		✓	pg. 182
<p>b. Assurances of legal compliance with all health and safety, ADA, and applicable building codes.</p> <p>The petitioner assures that all health and safety, ADA, and applicable building codes will be enforced.</p>	✓		pg. 126/130
<p>c. Adequate budget for anticipated costs, including renovation, rent, maintenance and utilities.</p> <p>Rent, utilities, 'housekeeping/custodial', and 'vendor repair' are planned for in Year 1, all of which are increased per school year. Estimated costs appear to be low for what would be needed. i.e. housekeeping/custodial is slated for \$16,800 in Y1, however, staffing does not include custodial or maintenance employees creating a very low threshold for cleaning and</p>		✓	pg. 203/208

<p>facilities maintenance.</p> <p>Petition identifies \$132,000 rent per year, which appears to be low. May require up to 7,000 - 8,000 square feet, for classroom, office, staff room, lunch room, etc. at \$24 / sf = approximately \$180,000. Petition identifies AB740 and \$99,000 rent offset.</p> <p>Further review of adequacy of budget for anticipated costs is included in the Financial Analysis section.</p>			
<p>d. Statement of whether a request will be made for use of authorizer-owned facilities.</p> <p>The petition states they will apply for Prop 39 by the deadline (11/1). The petitioner's response to NUSD states that they did apply to NUSD on 11/1. Prop 39 request denied by the district on Feb 1st.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023</p>	✓		pg. 182 response doc pg. 5
<p>e. Lease or occupation agreement for privately obtained facilities, and/or a copy of the lease agreement.</p> <p>Because the petition does not list potential sites, agreements or leases are not included. Petitioner states they are currently working with real estate agents to look for viable sites.</p>		✓	pg. 182

Comments by review team:

Impact Statement

Evaluation Criteria: EC 47605(h)	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			
<p>1. Number of students anticipated to enroll.</p> <p>Starting at 95 & growing to 244 in year 5</p>	✓		p 11, 199-200
<p>2. Whether the charter will request to purchase support services from authorizer.</p> <p>Does not state they will purchase services, only that they may.</p>	✓		p. 182

3. Affirmation there will be a memorandum of understanding between the authorizer and charter school.	✓		p 183-184
Intends to enter an MOU to indemnify the authorizer for the actions of the Charter School.			
4. Processes and policies between the charter and its authorizer, including the following:			
a. Process, activities and associated fees for oversight of the charter. Charter agrees to and submits to visits & inspections / paragraph 1 will pay 1%	✓		p 181 & 204
b. Processes, timelines, and evaluation criteria for annual review and site visits. Charter agrees to and submits to the right of authorizer	✓		p. 181
c. Regular, ongoing fiscal and programmatic performance monitoring and reporting.			p 102-106
d. Process, timelines and evaluation criteria for charter renewal.			
e. Other important legal or operational relationships between authorizer and charter school. Any additional legal or operational relationships between authorizer and charter school to be addressed through a successfully negotiated MOU.	✓		p 87
5. Criteria and procedure for the selection of a contractor, if applicable, including the following			
a. Process for determining necessary expertise.			
b. Selection of the contractor or contractors, if applicable.			
6. Potential civil liability effects, if any, upon the school and the authorizer.	✓		p 183-184
Comments by review team:			

Community Impact			
Evaluation Criteria: EC 47605(c)(7)	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			
1. How the charter school will not substantially undermine existing school district services, academic offerings, or program offerings.		✓	

<p>Full enrollment at year 5 is projected by the petition to be at 244 students in grades TK-5. The desired location of the school is identified as southeast and southwest Novato. Novato Unified School District has identified specific fiscal and staffing impact on the district.</p> <p>If the identified site is in the desired location, there is a potential impact to the district schools in these areas and district overall. One of these sites, Hamilton School, is the only K-8 school in the district.</p> <p>The premise put forth in the petition identifying that the charter would receive SB740 funds indicates that the location of the charter would be located within the Hamilton area. When fully built out, the charter enrollment would equal half the current K-5 enrollment in Hamilton. It is reasonable therefore to assume that a TK-5 charter school located within the same area as the current Hamilton School would draw students from that area and the reduction in enrollment of the K-5 population of the K-8 school would create a substantial impact to the existing school, including services, academic and program offerings.</p> <p>It is therefore reasonable to assume that the charter will substantially impact existing schools, academic offerings, or program offerings.</p>			
<p>2. Whether the charter school petition duplicates a program currently offered by the district, and whether the existing program has sufficient capacity for the pupils proposed to be served within reasonable proximity of where the charter school intends to locate.</p> <p>Petition notes on Page 11 the unique aspect of Healy School is the resilience studies curriculum and on Page 12 that it would offer a comprehensive resilience studies program, specifically focusing on brain science and skill development. Page 32 notes that the resilience studies curriculum is “aimed to foster resilience and self-reliance in elementary school students”. The petition notes this is separate and different from social and emotional learning. On pg. 57-58, the petition notes the following unique aspects of Healy School: resilience studies curriculum, tutoring, visual learning for mathematics, hybrid learning approaches, culture of diversity, advisory, and no-homework policy except for reading nightly. On Page 20, the petition identifies their aim to serve underserved and general populations with a unique program and has identified three main areas of community need that include: resilience, improved student outcomes, and transitional kindergarten.</p> <p>The Novato Unified School District (NUSD) provides social-emotional programming utilizing a variety of SEL curricula, including Kimochis, Second Step, The Tool Box, throughout elementary grade levels. Lessons and materials are aligned to the CASEL standards. The CASEL framework, categorized as Social Emotional Learning, includes competencies that overlap with the “Healthy Brain” framework. The District staff report provides further information and states that the Charter program will duplicate existing District programs that have capacity to support the students the Charter is aiming to serve.</p>		✓	

Based upon review, the petition does not contain sufficient detailed information demonstrating how it is not a duplication of District programming.			
<input type="checkbox"/> Petitioner response to clarifying question: Not Satisfied ; Written response dated February 22, 2023 stated one example of this conclusion <i>“For example, we may have a teacher ask a student: Why are you feeling this way? (if they notice an emotional moment) and then ask: What will make you feel successful again?”</i> The inquiries put forward to the student align with social emotional learning, which is not distinct from NUSD strategies.			

Comments by review team:

Special Education

Evaluation Criteria: EC 47641(a) and EC 47646	Evaluation Standard Met		Located on Page(s)
THE PETITION DESCRIBES, AT MINIMUM	Yes	No	
<p>1. The school's special education structure (3 options):</p> <ul style="list-style-type: none"> a. Charter school will be an independent LEA for special education purposes. b. Charter school will be a school within the district. c. The charter school will be a SELPA. <p>Note: If the charter elects “b”, a school within the district, district staff will be responsible to serve students, the district will collect special education funding, and the charter may pay a share of district's overall costs.</p> <p>The petition indicated on p. 76 & 77 that the charter intends to operate as an independent LEA and is considering membership with El Dorado SELPA or “perhaps others.”</p> <p>The petition noted on p.7 that the petitioner attended El Dorado Charter SELPA's virtual “New Potential Partner” meeting on 10/14/22 and is “engaging with El Dorado SELPA.”</p> <p>The petition also indicated that if not accepted by the noted SELPA for first year of operation, it would be a “school within the district.”</p> <p>Conversation with petitioner dated January 20, 2023: The Marin County SELPA Director spoke with the petitioner regarding the intended structure of special education programs at the charter school. The petitioner shared that the charter is currently in the application process with the El Dorado Charter SELPA and intends to operate as an</p>	✓		p. 76, 77

independent local educational agency (LEA) for special education purposes.			
<p>2. How special education services will be provided consistent with the SELPA plan and/or policies and procedures.</p> <p>The petition indicated on p.77 that the charter intends to comply with all state and federal laws related to the provision of special education instruction and related services and all SELPA policies and procedures, including the use of appropriate SELPA forms.</p> <p>The petitioner does not provide specific details regarding the application of services, other than the Charter intends to provide an “inclusion model” (p.96). (See Element A question 4f.)</p> <p>Conversation with petitioner dated January 20, 2023: The Marin County SELPA Director spoke with the petitioner regarding how special education services will be provided to students with IEPs. The petitioner shared that the charter can provide assurances that special education programs will be provided consistent with the El Dorado Charter SELPA.</p> <p>Meets minimum requirements with regard to how special education services will be provided.</p> <p>a. Includes a fiscal allocation plan in alignment with the SELPA the charter plans to join.</p> <p>No specific fiscal allocation plan is provided. The charter intends to join the El Dorado Charter SELPA.</p> <p>On p. 77 the petition indicates that the charter school will receive state and federal dollars in accordance with the SELPA's allocation plan. It further noted that if membership is not gained within a SELPA the first year, the charter will enter an MOU with the COE and COE will forward all state and federal special education revenues generated by Charter enrollment.</p> <p>The petition does not include reference to the Marin County SELPA fiscal allocation plan it will be working under if a member, because the charter intends to be accepted by El Dorado SELPA.</p> <p><input type="checkbox"/> Petitioner response with regard to inclusion of a fiscal allocation plan in alignment with the SELPA that charter plans to join: Not satisfied; written response indicates application to El Dorado SELPA to be submitted February 24, 2023 with acceptance in May. Fiscal allocation plan in alignment with El Dorado SELPA is not included in response.</p>		✓	p. 77 p. 85 p. 96
<p>3. Affirmation that the charter school will assume full responsibility for appropriate accommodations to address the needs of any student.</p> <p>The petition affirms on p.81 that the charter school will be responsible for ensuring all aspects of the IEP “and school site implementation” are maintained. Modifications and accommodations outlined in each</p>	✓		p. 81

student's IEP will be provided by the charter school.			
<p>4. Acknowledgment that the charter is responsible for providing special education, instruction and related services to the students enrolled in the school, regardless of any student's district of residence.</p> <p>The petition indicates on p.77 that the charter school acknowledges that it shall "provide all necessary special education instruction and related services in the same manner as special education services are provided in any other school in the COE, and the Charter School shall maintain liability for the services it provides."</p> <p>The petition indicates on p.76 that the charter school is responsible for supporting all students with disabilities who are enrolled in the school, and pledges to work in cooperation with the COE where applicable to ensure that there is a free and appropriate public education provided to all students.</p> <p>The petition indicates its staffing pattern on p.198 and does not include a special education teacher for Year 1 yet notes that 12-15% of expected students enrolled will be eligible for special education services. The petition later notes that it will contract for a special education teacher and service providers (p.202); however, anticipated FTE for noted special education providers is not delineated. The budget does include itemized contracted services costs for the delivery of special education services.</p> <p>The petition indicates that the Charter will not be responsible for transportation "except required by law" and does not include anticipated transportation costs for students with IEPs where requirement for transportation services may exist.</p> <p>The petition minimally meets the requirements.</p>	✓		
<p>5. The process for notifying a student's district of residence and authorizing LEA when a special education student enrolls, becomes eligible or ineligible, and/or leaves the charter.</p> <p>Reference to notifying a student's district of residence when a student leaves is made note of in the School Closure section of the petition (Page 177).</p> <p>The petitioner references on Page 136 Ed Code Section 47605(e)(4)(B) related to the request of a pupil's records upon enrollment; however, no indication of the process for notifying a student's district of residence and authorizing LEA when a special education student enrolls, becomes eligible or ineligible, and/or leaves the charter.</p> <p>Petition notes that the Charter will follow all state and federal laws related to the provision of special education services and all SELPA policies and procedures, including the use of appropriate SELPA forms.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied*; written response dated February 22, 2023 notes they will follow all applicable laws. *Upon submission and</p>	✓*		p. 177 p. 136

acceptance to a SELPA, this would be considered satisfied.			
<p>6. The transition to or from a district when a student with an individualized education program (IEP) enrolls in or transfers out of the charter.</p> <p>The petition indicates on p.78 that the Charter will assure that a student with an IEP upon transfer from another school either in or out of the SELPA, as well as from out of state, will have an IEP upon enrollment.</p> <p>The petition does not reference the transition when a student transfers out of the charter, other than as noted in School Closure.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023.</p>	✓		p. 78
7. Evidence that the school has consulted with a SELPA, such as a letter from SELPA confirming receipt of application. The evidence should demonstrate the following:			
<p>a. An understanding of the charter's special education responsibilities.</p> <p>Petitioner indicated they will join a SELPA, will follow SELPA procedures and will comply with all provisions of IDEA.</p>	✓		
<p>b. A draft application of SELPA policies, or assurance that such policies will be created.</p> <p>Petitioner has not provided a copy of the El Dorado Charter SELPA policies. As noted earlier, acceptance to the El Dorado Charter SELPA or if not accepted by the noted SELPA for first year of operation, it would be a "school within the district."</p> <p><input type="checkbox"/> Petitioner response: Not satisfied; written response dated February 22, 2023 indicates submission to El Dorado SELPA to be submitted February 24, 2023 with acceptance in May. To date, evidence of submission has not been provided. Affirmation/confirmation of acceptance and compliance with the El Dorado SELPA to be included with an MOU.</p>		✓	
8. Includes the following assurances:			
<p>a. The charter will comply with all provisions of IDEA.</p> <p>The petition provides assurance on p.8 that the Charter will comply with all provisions of IDEA.</p>	✓		p. 8
<p>b. No student will be denied admission based on disability or lack of available services.</p> <p>The petition indicates on p. 135 that no student shall be discouraged from applying based on disability, and on p.136 indicates that all students in the state of California and meet the age eligibility</p>	✓		p. 135

<p>requirements may apply to the charter school. Enrollment/Admission is done through a lottery system.</p> <p>The petition also indicates on p.135 that the charter shall admit all students who wish to attend the Charter and the school will comply with all laws.</p>			
<p>c. A student study team process will be implemented.</p> <p>The petition provides assurances on pg. 68 that a student study team will be in place to support MTSS model. The SST team will consist of teachers and specialists whose aim is to “increase student achievement and close any existing learning gaps.”</p>	✓		p. 168
<p>d. Any student in need of Section 504 services will receive such services.</p> <p>The petition provides assurances on p.8 that the Charter will adhere to all provisions of Section 504 of the Rehabilitation Act. Additionally, the petition provides information regarding the provision of Tier 3 support to students with a 504 Plan on pg. 70, as well as testing accommodations as noted on p.73. Further, the petition indicates on p.78 that a referral for services through the provision of a 504 Plan would be made under the MTSS model.</p>	✓		p. 8 p. 70 p. 78
If the charter will not be an independent LEA			
<p>1. Clarifies in the charter petition or in a memorandum of understanding the responsibilities of each party for service delivery, including referral, assessment, instruction, due process, and agreements describing allocation of actual excess costs.</p> <p>The petition provided clarification that an MOU will be established in first year of operation if it does not gain membership with noted SELPA as the Charter will operate as a “school within the district.”</p> <p>*The specifics/determination of the responsibilities of each party would need to be agreed upon and memorialized in the MOU with the COE.</p> <p>The petition indicated that the Charter will take full responsibility to satisfy state and federal Child Find requirements, conduct assessments in accordance with IDEA (p.78-80).</p> <p>The petitioner indicated that the Charter will fulfill its responsibilities to provide special education instruction and “pledges to work in cooperation with COE where applicable to ensure that a free and appropriate education is provided to all students with exceptional needs.” On p.84, the petition indicated that the Charter will be responsible for hiring, training, and/or contracting with necessary staff for the provision of special education services to students and anticipates contracting for the special education teacher position as well as any related service providers (p.85).</p> <p>The petition indicated that if a parent/guardian files for due process or requests mediation, the Charter shall represent itself (p.86) to “defend the case.” The petition indicates that it has the right to make “alternative</p>	✓*		

<p>arrangements” for legal representation to resolve disputes.</p> <p>The petition also indicated that if a complaint is filed against the Charter, it will have appropriate policies and procedures in place to respond accordingly, and will respond and address the complaint.</p> <p>The petition indicates that it is not responsible for any encroachment on general funds related to the placement of students with IEPs in non-public schools (p. 87).</p> <p>The petition indicates that the Charter will not be responsible for transportation “except required by law” and does not include anticipated transportation costs for students with IEPs.</p> <p>The petition does not include a drafted agreement of actual allocation of excess costs as the Charter anticipates being an independent LEA with the El Dorado Charter SELPA.</p> <p>The petition indicates its staffing pattern on p.198 and does not include a special education teacher for Year 1 yet notes that it is 12-15% of expected students enrolled will be eligible for special education services. The petition later notes that it will contract for a special education teacher and service providers (p.202).</p>			
<p>2. An assertion that the charter will be fiscally responsible for its fair share of any contributions from general funds.</p> <p>The petition demonstrates an understanding that the charter school is fiscally responsible for its fair share of contributions from general funds.</p> <p>*The specifics/determination of the fair share contribution would need to be agreed upon and memorialized in the MOU with the COE.</p>	✓*		
If the charter school is an independent LEA within a SELPA			
<p>1. Notifies the SELPA director of its intent to participate before February 1 of the preceding school year.</p> <p>The petition does not include evidence that the Charter has notified the SELPA Director of its intent to participate. The petition indicates that the Charter petitioner has participated in El Dorado SELPA’s virtual “New Potential Partner” meeting on 10/14/22 and has been “engaging” with El Dorado SELPA. The petitioner also indicated that if not accepted by the noted SELPA for first year of operation, it would be a “school within the district.”</p> <p>Conversation with petitioner dated January 20, 2023: The Marin County SELPA Director spoke with the petitioner regarding the intended structure of special education programs at the charter school. The petitioner shared that the charter is currently in the application process with El Dorado Charter SELPA and intends to operate as an independent local educational agency (LEA) for special education purposes.</p> <p><input type="checkbox"/> Petitioner response: Not Satisfied; written response dated February</p>		✓	

<p>22, 2023 indicates submission to El Dorado SELPA to be submitted February 24, 2023 with acceptance in May. Communication attached in written response includes email correspondence from El Dorado SELPA on February 10, 2023 notifying of the application window opening. This communication does not satisfy requirements.. Evidence that the petitioner notified the SELPA director of intent to participate by February 1 is not included. Additional response on February 26, 2022 does not demonstrate evidence of submission by February 1</p>			
<p>2. Includes its current operating budget in accordance with EC 42130 and EC 42131</p> <p>The petition includes an operating budget.</p> <p>The petition indicates on p.88 that it understands that it is subject to the allocation plan of the SELPA that it intends to be a member of as a Charter school.</p> <p>Please see the Financial and Administrative Plan section of this report for an analysis of the operating budget related to the provision of special education services.</p>	✓		
<p>3. Understands that the charter school is fiscally responsible for its fair share of any contributions from general funds.</p> <p>The petition states that it is not responsible for any encroachment on the general funds related to the placement of students with IEPs in non-public schools (p. 87). *This would need to be aligned with the policies of SELPA in which the charter is a member.</p>	✓*		
<p>4. Asserts responsibility for any legal fees related to the application and assurances process.</p> <p>The petition indicates on p.86 that in an event that a family files for due process or files a complaint, the charter shall defend the case and make legal arrangements. The petition does not include reference to any legal fees related to these matters; however, has legal fees included in the proposed budget.</p>	✓		
<p>5. Demonstrates it is located within SELPA's geographical boundaries.</p> <p>The petitioner has indicated that it intends to identify a location with the Southwest or Southeast area of Novato, and if a location is not identified independently it will apply to NUSD for Prop 39 facilities by legal deadline to ensure the District allocated space is available if a private facility cannot be located and secured.</p>	✓		
<p>6. Asserts all instruction will be in a safe environment.</p> <p>The petition indicates on p. 182 that the charter is seeking feasible (space, safety, transportation, cost) private facilities. The petition indicates on -.183 that the school will meet state and local building</p>	✓		

codes, federal ADA access requirements, fire and safety regulations, and all other requirements of a similar organization serving public school students in CA. Further, a safety plan will be developed and maintained on the charter campus.			
<p>7. Affirms the terms of the agreement will be met regarding the organization, implementation, administration and operation of the SELPA.</p> <p>In review of the petition, it appears the understanding of the organization, implementation, administration, and operation of the SELPA is vague.</p> <p><input checked="" type="checkbox"/> Petitioner response: Satisfied; written response dated February 22, 2023 affirms the Charter will follow all education law, SELPA policies and procedures. Minimally satisfies requirements.</p>	✓		
<p>Comments by review team:</p> <p>The petition indicates that the Charter intends to operate as an independent LEA. However, if not accepted by the noted SELPA for first year of operation, the charter would operate as a “school within the district. The review of this section includes both special education structures since this has yet to be determined.</p>			

Required Declaration

Evaluation Criteria: EC 47605(c)(6)	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			
<p>1. Declaration of whether or not the charter school shall be deemed the exclusive public employer of the employees of the charter school for purposes of Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code.</p> <p>Petition states that it shall be deemed the exclusive employer of the employees of the Charter School for purposes of the Educational Employment Relations Act</p>	✓		Page 7

Required Affirmations

Evaluation Criteria: EC 47605(e)	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			

<p>1. Affirmation that the school will be nonsectarian in its:</p> <p>Programs</p> <p>Admission policies</p> <p>Employment practices</p> <p>All other operations</p> <p>Petition states on page 7 that the Charter School shall be nonsectarian in its programs, admissions, policies, and all other operations.</p> <p>Petition states on page 114 that the Charter School shall be nonsectarian in its employment practices.</p>	✓	Page 7 Page 114
<p>2. Affirmation that the school shall not charge tuition.</p> <p>Petition states that the Charter School shall not chart tuition.</p>	✓	Page 7
<p>3. Affirmation that the school shall not discriminate against any pupil on the basis of disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the California Penal Code.</p> <p>Petition states that the Charter School shall not discriminate on the basis of the characteristics listed in Section 220 (actual or perceived disability, gender, gender identify, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code.</p>	✓	Page 8
<p>4. Affirmation that admission to a charter school shall not be determined according to the place of residence of the pupil, or of the pupil's parent or legal guardian, within this state, except that an existing public school converting partially or entirely to a charter school under this part shall adopt and maintain a policy giving admission preference to pupils who reside within the former attendance area of that public school.</p> <p>Petition states that except as required by Education Code Section 5706(e)(2) admission to the Charter School shall not be determined according to the place of residence of the student or of that student's parent or legal guardian within the State and that preference in the public random drawing, should the Charter School receive a greater number of applications than there are spaces for students, shall be given as required by Education Code Section 5706(e)(2)(B)(i)-(iv).</p>	✓	Page 7
<p>5. Affirmation that the charter school shall admit all pupils who wish to attend the charter school.</p>	✓	Page 7

Petition states the Charter School shall admit all students who wish to attend, unless the Charter School receives a greater number of applications than there are spaces for students, in which case it will hold a public random drawing to determine admission.			
<p>6. Affirmation that the school will comply with federal, state and local laws as required for charter schools.</p> <p>Petition states that if awarded the Charter, the Charter School will follow and continue to comply with any and all federal, state and local laws and regulations that apply to the Charter School.</p>	✓		Page 7
Comments by review team:			

Alternative Education Criteria

Criteria For Alternative Education Charter Schools, If Applicable			
Evaluation Criteria: EC 58500 - 58512	Evaluation Standard Met		Located on Page(s)
<i>THE PETITION DESCRIBES, AT MINIMUM</i>	Yes	No	
1. Acknowledgement that the charter school will maintain an unduplicated pupil count of at least 70% of the school's total enrollment, composed of the following required high-risk student groups:	<input type="radio"/>	<input type="radio"/>	
a. Expelled (EC 48925(b)) including situations in which enforcement of the expulsion order was suspended (EC 48917).	<input type="radio"/>	<input type="radio"/>	
b. Suspended (EC 48925(d)) more than 10 days in a school year.	<input type="radio"/>	<input type="radio"/>	
c. Wards of the court (Welfare and Institution Code (WIC) Section 601 or 602) or dependents of the court (WIC Section 300 or 654).	<input type="radio"/>	<input type="radio"/>	
d. Pregnant and/or parenting.	<input type="radio"/>	<input type="radio"/>	
e. Recovered dropouts – State Board of Education (SBE) defines recovered dropouts based on EC 52052.3(b) as students who: (1) are designated as dropouts pursuant to the exit and withdraw codes in the California Longitudinal Pupil Achievement Data System (CALPADS), or (2) left school and were not enrolled in a school for a period of 180 days.	<input type="radio"/>	<input type="radio"/>	
f. Habitually truant (EC 48262) or habitually insubordinate and disorderly whose attendance at the school is directed by a school attendance review board or probation officer (EC 48263).	<input type="radio"/>	<input type="radio"/>	

g. Retained more than once in kindergarten through grade eight.	<input type="radio"/>	<input type="radio"/>	
h. Students who are credit deficient (i.e., students who are one semester or more behind in the credits required to graduate on time, per grade level, from the enrolling school's credit requirements).	<input type="radio"/>	<input type="radio"/>	
i. Students with a gap in enrollment (i.e., students who have not been in any school during the 45 days prior to enrollment in the current school, when the 45 days does not include noninstructional days such as summer break, holiday break, off-track, and other days when a school is closed).	<input type="radio"/>	<input type="radio"/>	
j. Students with a high level of transiency (i.e., students who have been enrolled in more than two schools during the past academic year or who have changed secondary schools more than two times since entering high school).	<input type="radio"/>	<input type="radio"/>	
k. Foster youth (EC 42238.01[b]).	<input type="radio"/>	<input type="radio"/>	
l. Homeless youth.	<input type="radio"/>	<input type="radio"/>	
2. Clearly articulated mission and purpose to recruit and educate high-risk students.	<input type="radio"/>	<input type="radio"/>	
3. Performance plan that include specific measures and goals for success, including one or two attainable norm references and/or verifiable alternative measures that support the school's mission and vision.	<input type="radio"/>	<input type="radio"/>	
4. Required assurances:	<input type="radio"/>	<input type="radio"/>	
a. The school will maintain documentation that 70% of students will be reflected on Part 1 of their Dashboard Alternative School Status (DASS) participation form, as defined in item 1 above.	<input type="radio"/>	<input type="radio"/>	
b. When applying for other alternative school status, ONLY the school's current enrollment will be used (in accordance with the DASS eligibility criteria and examples) to determine a school's percentage of high-risk student for DASS eligibility. A student is considered high-risk if they meet one of the high-risk criteria approved by the SBE upon first enrollment at the school. If their high-risk status starts after first entry to the school, they cannot be counted as high-risk in this calculation.	<input type="radio"/>	<input type="radio"/>	
Comments by review team:			

Independent Study Supplemental Criteria

Independent Study/Non-Classroom-based Instruction — For Renewals Only
 (There is a 5-year moratorium on the approval of new petitions effective January 1, 2020 to January 1, 2025)

Evaluation Criteria: EC 51745	Evaluation Standard Met		Located on Page(s)
	Yes	No	
THE PETITION DESCRIBES, AT MINIMUM			
1. An assurance that the K-12 public school guidelines for independent study will be evident in the annual audit per EC 47612.5(b).	<input type="radio"/>	<input type="radio"/>	
2. An assurance that the charter will meet the requirement related to the ratio of average daily attendance (ADA) to full-time equivalent (FTE) certificated employees as prescribed under EC 51745.6(a).	<input type="radio"/>	<input type="radio"/>	
3. An acknowledgement that independent study will be supervised by an appropriately credentialed teacher per EC 51747.5(a).	<input type="radio"/>	<input type="radio"/>	
4. An acknowledgement that the charter may claim apportionment credit for independent study only to the extent of the time value of pupil or student work products, as personally judged in each instance by a certified teacher, per EC 51747.5(b).	<input type="radio"/>	<input type="radio"/>	
5. The maximum length of time, by grade level and type of program, that may elapse between the time an independent study assignment is made and the date by which the pupil must complete the assigned work (EC 51747(a)).	<input type="radio"/>	<input type="radio"/>	
6. The number of missed assignments that will be allowed before an evaluation is conducted to determine whether it is in the best interest of the pupil to remain in independent study or whether the pupil should return to a regular school program (EC 51747(b)).	<input type="radio"/>	<input type="radio"/>	
7. An assurance that each written agreement shall be signed, prior to the commencement of independent study, by the pupil, the pupil's parent, legal guardian or caregiver if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil (EC 51747(g) (9)(A)).	<input type="radio"/>	<input type="radio"/>	
8. A description of how the required written agreement for each pupil will be processed and maintained, including at a minimum the following (EC 51747(g)):	<input type="radio"/>	<input type="radio"/>	
a. The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding the pupil's academic progress.	<input type="radio"/>	<input type="radio"/>	
b. The objectives and methods of study for the pupil's work, and the methods used to evaluate that work.	<input type="radio"/>	<input type="radio"/>	
c. The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access for all pupils to the connectivity and devices needed to participate in the educational program and complete assigned work.	<input type="radio"/>	<input type="radio"/>	

d. A statement of the policies adopted pursuant to subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, and the number of missed assignments allowed prior to an evaluation of whether or not the pupil should be allowed to continue in independent study.	<input type="radio"/>	<input type="radio"/>	
e. The duration of the independent study agreement, including the beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year.	<input type="radio"/>	<input type="radio"/>	
f. A statement of the number of course credits, or, for elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.	<input type="radio"/>	<input type="radio"/>	
g. A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or who need support in other areas, such as English learners or individuals with exceptional needs, to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 USC Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.	<input type="radio"/>	<input type="radio"/>	
h. The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate.	<input type="radio"/>	<input type="radio"/>	
Comments by review team:			

The Petition Review Team

Identify your team and which members will be responsible for reviewing which sections of the charter school petition.

Area of Review (EC 47605(c))	Department Responsible	Name of Reviewer(s)
A. Education Program	Education Services	Laura Trahan Beth Kradepohl Melissa Guerrero
B. Measurable Student Outcomes	Education Services	Laura Trahan Beth Kradepohl Melissa Guerrero
C. Student Progress Measurement	Education Services	Laura Trahan Beth Kradepohl Melissa Guerrero
D. Governance Structure		Bob Henry Janelle Campbell
E. Employee Qualifications	Personnel	Janelle Campbell Tracee Edmunds Beth Kradepohl
F. Health and Safety	Health, Safety, and Support	Mike Grant Melina Boyd Lisa Miller
G. Racial, Ethnic, Special Education and English Language Learner Balance	Education Services	Laura Trahan Lisa Miller
H. Admissions Policies and Procedures	Education Services	Laura Trahan Katy Foster Lisa Miller
I. Annual Financial Audits	Business Services	Kate Lane Randy Jones
J. Suspension and Expulsion	Education Services	Laura Trahan Katy Foster Lisa Miller
K. Staff Retirement System	Business Services/Personnel	Kate Lane Tracee Edmunds
L. Attendance Alternatives	Education Services/Business	Laura Trahan Randy Jones
M. Post-Employment Rights of Employees	Personnel	Janelle Campbell Tracee Edmunds
N. Dispute Resolution Process	Personnel	Janelle Campbell Tracee Edmunds
O. Closure Procedures	Business Services	Kate Lane

		Randy Jones
Supplemental Criteria		
Areas of Review EC 47605(h), 47641(a), 47646	Department Responsible	Name of Reviewer
Financial/Administrative Plan	Business Services	Kate Lane Randy Jones
Charter Management Organization (i.e., entities managing charter schools)	Business Services	Kate Lane Randy Jones
Facilities	Maintenance and Operations	Mike Grant Melina Boyd Lisa Miller
Impact Statement	Business Services	Kate Lane Randy Jones
Community Impact	Various	Janelle Campbell Kate Lane
Special Education	Special Education	Rebecca Minnich Lisa Miller
Required Declarations and Affirmations	Various	Janelle Cambell Laura Trahan
Independent Study, if applicable		
Alternative Charter Schools, if applicable		
Consultant		Terena Mares

Appendix B:

Financial Analysis Provided to Petitioner

Healy School Charter Petition Appeal Review
Budget Analysis
2023-24 through 2027-28
Updated February 15, 2023

STRUCTURAL BUDGET: Solvent Insolvent

Budget and multi-year as presented

The budget and multi-year projection presented with the petition reflected a budget surplus in all years such that ending balance reserves are projected to be almost 54% by the end of the fifth year of operations.

The budget was based on 95 students growing to 244 students by year 5 generating average daily attendance (ADA) at a rate of 95% for 90 ADA in year one. Budgeted revenues were based on a projected student demographic of 63% low income, 16% English Learner for an unduplicated count of 63%.

The instructional staffing pattern provides one teacher for each class of 20-26 students with a paraprofessional assigned to all TK and K classrooms. Instructional staff are increased appropriately with projected student enrollment.

Books, supplies, and materials are increased with projected student enrollment and incorporate the start up budget for computer devices and fixtures, furnitures and equipment. The services and other operating expenses budget is likewise increased in step with projected enrollment increases.

Budget Risks to Revenues

- If LCFF revenue is calculated using the Novato Unified School District's unduplicated pupil percentage (37%), LCFF revenues are reduced by approximately 5% or \$56,051 in year one
- If the student population is less than 55%, the school will not be eligible for SB740 charter facility grant revenue which would reduce revenues by \$99,000 in the first year.
- The rate used for Expanded Learning Opportunities Program revenue beginning in year 2 of the budget projections is estimated at approximately twice the current rate. We therefore assume \$35,000 of the projected ELOP revenue in year 2 to be at risk.
- The enrollment projections do not appear to be supported by meaningful interest from the community. The LCFF revenues included in the budget projection would be reduced by approximately \$12,000 per ADA should actual enrollment fall short.

CONCLUSION: Budget Risks to revenues total \$155,051 in year one, more than surpassing the projected budget surplus of \$100,094. This does not take into account any loss of revenue associated with a lower student enrollment than projected.

Budget Risks to Expenses

- Start up costs for curriculum, computer devices, furniture and equipment appear understated in both the first year budget as well as the multi-year projection (the school proposes a continuous increase in both the number of classes as well as the grades served). In total we estimate these expenses are understated by almost \$70,000 in the first year.
- Professional development costs appear understated by almost \$22,000.
- Program costs to provide nutrition services as required under Universal Meals, before and after school services to implement the Expanded Learning Opportunity Program and costs associated with special education services in total appear understated by almost \$55,000 in the first year budget.
- Facility costs appear understated by approximately \$52,000 in the first year budget based on current rates and minimum facility requirements.
- The line item for other supplies appears to have been omitted from total budgeted expenses thereby understating the budget by almost \$12,000 in the first year

CONCLUSION: Budget Risks to expenses total \$210,174 in year one, more than double the projected budget surplus of \$100,094.

OVERALL CONCLUSION: If all risks quantified above are realized, the first year budget would reflect \$265,000 more in expenses than revenue and all years projected would likewise reflect expenses in excess of available revenues.

Any reduction in revenues resulting from lower enrollment than projected will further increase the projected deficit and risk of insolvency.

The budget is at high risk of being structurally insolvent for all years presented.

Healy Charter School - Petition Appeal

Budget Analysis

SUMMARY

	2023-24	2024-25	2025-26	2026-27	2027-28
Income	1,418,196	2,202,991	2,947,796	3,693,960	4,107,550
Expense	1,318,102	1,799,410	2,625,528	3,194,619	3,533,923
Net Income	100,094	403,581	322,268	499,341	573,627
Beginning Net Assets	-	100,094	503,675	825,943	1,325,284
Ending Net Assets	100,094	503,675	825,943	1,325,284	1,898,911
As % of expense	7.6%	28.0%	31.5%	41.5%	53.7%

Budget Risks to income

1 LCFF	(56,051)	(86,728)	(118,221)	(152,426)	(205,378)
3a ELOP		(35,264)	(55,070)	(76,607)	(104,281)
3b SB740	(99,000)	(123,750)	(169,682)	(219,415)	(248,914)
Total income risks	(155,051)	(245,742)	(342,973)	(448,448)	(558,572)

Budget risks to expenses

6a Other supplies	11,925	20,973	27,246	33,519	36,271
6b Curriculum	28,163	14,125	2,302	5,487	(14,704)
6c Furniture and Equipment	8,200	4,100	4,100	2,050	2,050
6d Computers	33,206	3,650	(12,169)	28,768	2,488
6e Nutrition program	16,117	21,119	52,097	79,175	102,353
tab ELOP program costs	59,292	83,916	108,391	89,614	86,392
tab Special Education	(20,748)	9,645	39,891	38,490	21,024
tab Professional Development	21,700	21,700	21,700	21,700	21,700
Facility lease	52,320	72,312	67,075	59,917	83,023
Total expense risks	210,174	251,539	310,633	358,719	340,596
Change to net income	(365,225)	(497,281)	(653,606)	(807,167)	(899,168)
Adjusted Net Income	(265,131)	(93,700)	(331,338)	(307,826)	(325,541)
Beginning Net Assets	-	(265,131)	(358,832)	(690,170)	(997,995)
Adjusted Ending Net Assets	(265,131)	(358,832)	(690,170)	(997,995)	(1,323,537)
As % of expense	-17%	-17%	-24%	-28%	-34%

PROJECTED REVENUE

1 LCFF

We recalculated the LCFF using the assumptions provided and confirmed the estimates. However, the Charter's proposed budget assumes a 63% unduplicated percentage. If the Charter's student population more closely reflects the district as a whole, LCFF revenue would be reduced. See review of enrollment and demographic assumptions.

2 Federal Revenue

	2023-24	2024-25	2025-26	2026-27	2027-28
Budget	86,928	137,234	182,745	231,793	263,781
annual budget growth		58%	33%	27%	14%
annual student growth		44%	32%	24%	8%

The charter's federal budget will be dependent on student demographics and is primarily Child Nutrition. See analysis of Nutrition budget below.

Growth in Y2 (58% increase in revenue for a 44% increase in students) due to receipt of IDEA funds beginning Y2.

3 Other State Revenue

	2023-24	2024-25	2025-26	2026-27	2027-28
Budget	133,813	246,694	340,909	440,699	510,760
annual budget growth		84%	38%	29%	16%
annual student growth		44%	32%	24%	8%

Growth in 2024-25 is due to adding budget for ELOP (70,925).

Budget is made up of:

Child Nutrition	13,424	19,359	25,577	31,794	34,479
Lottery	21,389	30,846	40,752	50,659	54,937
Mandate block grant		1,814	2,714	3,657	4,637
ELOP		70,925	102,184	135,174	167,794
SB740 Charter Facility Grant Program	99,000	123,750	169,682	219,415	248,914
	133,813	246,694	340,909	440,699	510,761

Child Nutrition

see analysis of Child Nutrition budget below

Lottery	237	237	237	237	237	per ADA
Mandate block grant		14	16	17	20	per ADA
ELOP		545	594	632	724	per ADA
Novato's ELOP 21-22 rate		274	274	274	274	per ADA

3a Overstated ELOP Revenue (35,264) (55,070) (76,607) (104,281)

The estimates above appear reasonable based on projected ADA except for the ELOP funds.

3b SB740 Charter Facility Grant Program

Eligibility for this revenue stream is based on a minimum of 55% of the student population qualifying for free or reduced price meals and provides 75% of the cost of rent/lease up to a cap per ADA. Cap of funding per ADA of \$ 1,117. 2018-19 rate - is indexed for COLA.

<https://www.cde.ca.gov/re/pr/csfgp.asp>

California School Finance Authority

no longer administered by CDE

<https://www.treasurer.ca.gov/csfa/csfgp/index.asp>

We recalculated the estimated revenues and agree with the results based on the assumptions provided, however, the charter would have to draw almost entirely from Hamilton to achieve the % FRPM which would represent approximately 80% of the elementary grades which seems highly unlikely.

See review of enrollment and demographic assumptions.

For this reason, we consider the entire revenue estimate to be questionable.

	2023-24	2024-25	2025-26	2026-27	2027-28
SB740 revenue	99,000	123,750	169,682	219,415	248,914
Rents/Lease expense	132,000	165,000	226,243	292,553	331,885
	75%	75%	75%	75%	75%
Amount per ADA	1,096.95	950.83	986.81	1,026.50	1,073.83

We also note the rents/leases program is oversubscribed and per the 2020-21 Annual Report, awards were pro-rated at 92.64%, thus, should the charter qualify for the program, the minimum at risk is as follows

Pro-rated at 92.64%	91,714	114,642	157,193	203,266	230,594
revenue loss	\$ 7,286	\$ 9,108	\$ 12,489	\$ 16,149	\$ 18,320

4 Other Local Revenue	2023-24	2024-25	2025-26	2026-27	2027-28
Budget	64,529	93,057	122,944	152,831	165,737
annual budget growth		44%	32%	24%	8%
annual student growth		44%	32%	24%	8%
Amount per ADA	715	715	715	715	715

This budget represents the transfer of Special Education Apportionment the Charter anticipates receiving from the Charter SELPA and appears reasonable given current rates per ADA for AB602

PROJECTED EXPENSES

5 Salaries and benefits	2023-24	2024-25	2025-26	2026-27	2027-28
Certificated	271,000	453,220	775,845	943,691	1,050,901
Classified	281,600	371,140	528,600	591,369	643,174
Benefits	120,667	183,943	292,870	342,209	376,564
Total	673,267	1,008,303	1,597,315	1,877,269	2,070,639
Benefits as % of salaries	22%	22%	22%	22%	22%

Substitute Teachers

The budget for substitute teachers is included in contracted services

Substitute teachers should be reflected in salaries as you cannot contract for this service

Assume 5% absence rate cost at \$125/day plus benefits at 10%

\$ 4,900	\$ 8,085	\$ 11,025	\$ 13,475	\$ 14,700
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Cost in budget (4,860) in year 1 appears reasonable

6 Books and Supplies	2023-24	2024-25	2025-26	2026-27	2027-28
	181,326	211,097	284,731	351,392	361,017
Core curricular materials	9,713	12,629	15,320	20,545	22,872
Books and ref materials	4,750	6,850	9,050	11,250	12,200
Student materials	12,697	18,310	24,191	30,071	32,611
Office Supplies	4,750	6,850	9,050	11,250	12,200
Custodial supplies	3,325	4,795	6,335	7,875	8,540
Food (non nutrition program)	450	743	968	1,193	1,305
PE & Sports Equipment	3,325	4,795	6,335	7,875	8,540
Before and After School Supplies	2,375	7,725	10,206	12,687	13,758
All other supplies	5,775	7,710	9,736	11,764	12,668
Other supplies	11,925	20,973	27,245	33,519	36,272
Non-capitalized equipment	56,900	28,150	43,369	48,338	29,812
Nutrition program	77,266	112,540	150,172	188,544	206,510
	193,251	232,070	311,977	384,911	397,288
6a formula error understating budget	11,925	20,973	27,246	33,519	36,271

Where are initial start up costs to stock the school with books and materials?

6b Core Curricular Materials

The budget appears extremely low for the curriculum being proposed

Budget	\$	9,713	\$	12,629	\$	15,320	\$	20,545	\$	22,872
Enrollment		95		137		181		225		244
Per pupil	\$	102.24	\$	92.18	\$	84.64	\$	91.31	\$	93.74

Analysis of first year budget

	Core subject area	Curriculum	Price per Unit	Pupils
1	ELA	Ca Wonders	274.76	26
2-5	ELA	Ca Wonders	141.56	51
K-5	Math	K-5 enVision	150	26
gr 3,4,5	History/Social Studies	NG Ladders	192.88	0
	History/Social Studies	NG Teachers	1097	
TK-5	Science	enVision Inter	100	95
TK-K		Tools of the Mind		
	ELD		73.33	15.2

Analysis of first year budget Estimated Cost

Core subject area	2023-24	2024-25	2025-26	2026-27	2027-28
ELA	7,143.76	-	-	6,044.72	-
ELA	7,219.56	7,143.76	6,594.24	6,044.72	6,044.72
Math	3,900.00	-	-	3,300.00	-
History/Social Studies	-	4,822.00	5,014.88	4,629.12	-
History/Social Studies		1,097.00	1,097.00	1,097.00	
Science	9,500.00	4,200.00	4,400.00	4,400.00	1,900.00
	8,998.00	8,998.00			
ELD	1,114.62	492.78	516.24	516.24	222.92
	37,875.94	26,753.54	17,622.36	26,031.80	8,167.64
initial budget	\$ 9,713	\$ 12,629	\$ 15,320	\$ 20,545	\$ 22,872
	budget understated \$ 28,163	\$ 14,125	\$ 2,302	\$ 5,487	\$ (14,704)

These estimates do not include any allowance for Resilience curricular materials

	Core subject area	Curriculum	Pupil growth			
			Y2	Y3	Y4	Y5
1	ELA	Ca Wonders	0	0	22	0
2-5	ELA	Ca Wonders	26	24	22	22
	Math	K-5 enVision	0	0	22	0
	History/Social Studies	NG Ladders	25	26	24	0
	Science	enVision Inter	42	44	44	19

6c Furniture and Equipment

Classroom Furniture and Equip	\$25,000	\$ 12,000	\$ 12,000	\$ 6,000	\$ 6,000
Other furniture and equipment	31,900	16,150	31,369	42,338	23,812
	56,900	28,150	43,369	48,338	29,812

Per classroom

Cost	
24 student desks and chairs	6000
teacher desk, chair	1800
whiteboard	500
8300 x 4 classes	33200
-2050 per class short	

Budget understated

\$8,200

	2023-24	2024-25	2025-26	2026-27	2027-28
new classes	\$8,200	4100	4100	2050	2050
budget shortfall per year	8200	4100	4100	2050	2050

6d Computers (included in non-capitalized equipment)

Budget (other furniture & Equi	31,900	16,150	31,369	42,338	23,812
The charter will need I-Pads for the younger students (T-K and K) which are more costly than chromebooks					
\$600 per I-PAD	26,400	10,800	13,200	-	- price confirmed with CD\
chromebooks @250/ea	23,706	6,000		4,500	5,000 price confirmed with CD\
replacements				50,106	16,800
teacher computers @ \$1,500	6,000	3,000	3,000	1,500	1,500
replacements				6,000	3,000
Admin & Office staff	4,500		3,000	4,500	
Counselor, SpEd, After School	4,500			4,500	
Total estimated cost for compu	65,106	19,800	19,200	71,106	26,300
Budget shortfall	33,206	3,650	(12,169)	28,768	2,488

The budget also doesn't appear to include costs to equip the school office, the director's office, or other ancillary staff

6e Nutrition Program Food and Supplies

	2023-24	2024-25	2025-26	2026-27	2027-28
Budget	77,266	112,540	150,172	188,544	206,510
divided by 175	441.52	643.09	858.13	1,077.39	1,180.06
enrollment	95	137	181	225	244
cost per student	4.65	4.69	4.74	4.79	4.84
Estimated Cost					
Breakfast per unit	2.50	2.63	2.76	2.89	3.04
Lunch per unit	5.00	5.25	5.51	5.79	6.08
Total cost	124,688	188,803	261,913	341,861	389,266
Expense understated	47,422	76,263	111,741	153,317	182,756

however, it appears the revenue budget is also understated:

Federal budget	64,830	83,492	123,518	153,545	166,511
State budget	13,424	19,359	25,577	31,794	34,479
	78,254	102,851	149,095	185,339	200,990
Daily rate per pupil	4.71	4.29	4.71	4.71	4.71

Under Universal Meals, LEAs are essentially reimbursed the federal rates for all students

Breakfast rate	2.26	2.26	2.26	2.26	2.26
Lunch rate	4.33	4.33	4.33	4.33	4.33
Total daily rate	6.59	6.59	6.59	6.59	6.59
Understated revenue	31,305	55,144	59,643	74,142	80,403

Net budget understated costs **16,117** **21,119** **52,097** **79,175** **102,353**

7 Services & Other Expenses	2023-24	2024-25	2025-26	2026-27	2027-28
	436,010	561,032	743,483	965,959	1,102,267

p 203-204 budget narrative

General Liability Insurance is projected at \$150 per student in FY 24 based on current rates, increasing annually with student growth
Healy School will pay 1% of LCFF revenues for oversight to its authorizing district, Novato Unified School District.

Healy School will utilize a back-office service provider to support financial and operational needs of the school. Services include accounts payable, accounting, budgeting and finance, and payroll.
The cost for these services is \$40,000 in the first year of operations.

Other significant expenses include Equipment Leases (\$5,400), Office Furniture (\$5,000), Field Trips (\$3,825), Legal Fees (\$8,000), Audit (\$4,500), Professional Development (\$7,500), Technology Consultants (\$7,500), School Information System & non-instructional Software (\$12,875), Advertising & Outreach (\$8,000), [Substitute Teachers \(\\$4,860\)](#), Communications including internet & website (\$17,080) in year one.

7 Services & Other Expenses	2023-24	2024-25	2025-26	2026-27	2027-28	
travel and conference	2,000	3,300	8,600	10,600	11,600	
dues and memberships	900	1,269	1,675	2,105	2,337	
general insurance	14,250	21,167	28,803	36,880	41,194	See Insurance below
utilities	22,440	33,332	45,358	58,076	64,869	See Utilities below
housekeeping services	16,800	24,954	33,958	43,479	48,565	See housekeeping below
Rent	132,000	165,000	226,243	292,553	331,885	See rent below
equipment lease	5,400	6,818	8,350	10,691	11,942	
vendor repairs	4,200	6,239	8,489	10,870	12,141	
field trips and pupil transportat	3,825	5,625	14,550	18,630	20,809	including Sp Ed HTST?
legal	8,000	11,883	16,170	20,704	23,126	
audit	4,500	9,270	9,548	9,835	10,130	appears reasonable
advertisement and recruitment	8,000	8,240	8,487	8,742	9,004	appears reasonable
substitute teachers	4,860	7,219	9,823	12,578	14,049	see note s/b salaries
special education services	103,750	109,450	107,380	159,463	203,242	see Special Education tak
after school services		5,000	10,000	12,804	14,302	see ELOP tab
other student instructional services		5,000	6,804	8,712	9,731	
PD Consultants and Tuition	7,500	11,140	15,160	19,410	21,681	See Prof Development ta
Nursing and Medical (non IEP)			20,000	25,000	25,000	How covered in Y1 and Y
All other consultants and servic	47,500	66,470	90,453	115,815	129,362	BackOffice \$40k; \$7.5k te
non instructional software	12,875	13,028	14,586	16,225	17,247	Student Information Syst
oversight fees	11,329	17,260	23,012	28,686	31,673	see review below
SELPA fees	3,549	4,722	4,902	6,141	6,785	
all other expenses	5,252	7,502	9,992	12,605	13,884	
office phone	1,200	1,236	1,273	1,311	1,351	appears reasonable per f
mobile phone	1,800	1,854	1,910	1,967	2,026	appears reasonable per f
internet	6,000	8,912	12,128	15,528	17,345	appears reasonable per f
website hosting	7,000	3,539	3,646	3,755	3,868	appears reasonable per f
postage and shipping	1,080	1,604	2,183	2,795	3,122	
Total operating services	436,010	561,033	743,483	965,960	1,102,270	

check oversight fees as 1% of LCFF

LCFF Revenue	1,132,926	1,726,006	2,301,198	2,868,637	3,167,272
1%	11,329	17,260	23,012	28,686	31,673
Agrees to petition budget	TRUE	TRUE	TRUE	TRUE	TRUE

All other consultants and servi	47,500	66,470	90,453	115,815	129,362
annual growth		40%	36%	28%	12%

enrollment	95	137	181	225	244
annual growth		44%	32%	24%	8%

backoffice	40,000	55,975	76,171	97,528	108,936
technology	7,500	10,495	14,282	18,287	20,426
	47,500	66,470	90,453	115,815	129,362

BackOffice provider \$40,000; \$7,500 for technology consultant per narrative p203-204

Communications

Requested review of communications costs and technology consultant from our IT Director:

That all seems reasonable with the assumption that the internet/phones are small office/home office type setup, meaning Comcast Business internet (with phone), something like that. Tech support would be minimal so that cost looks accurate.

Field Trips and Pupil Transportation

Budget	3,825	5,625	14,550	18,630	20,809
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Does this budget include special education home to school transportation? While it is difficult to estimate such costs, it would appear this estimate is insufficient - the amount budgeted is likely sufficient for field trips but not for both functions

General Insurance

We compared the rates above with the rates for the liability program operated by MSIA for all districts in Marin County for 2022-23. Our rates are kept low by retaining the first \$25k of loss. We further note the 2022-23 rates did NOT include a sizeable increase in the cost of cybersecurity

We fully anticipate cybersecurity and Child Sexual Abuse and Molestation coverage will continue to increase at a higher rate than seen in the past

Our 22-23 rates (without the cyber increase) were 11% above the prior year

Budget	14,250	21,167	28,803	36,880	41,194
ADA	90.25	130.15	171.95	213.75	231.8
cost per ADA	157.89	162.64	167.51	172.54	177.71
		3%	3%	3%	3%

MSIA liability rates for 2022-23	70.55	77.61	85.37	93.91	103.30
		10%	10%	10%	10%
Excess Cyber flat	10,336	11,369.60	12,506.56	13,757.22	15,132.94

Using an inflation factor of 10% and both a per ADA amount plus flat excess cyber policy:

Estimated budget	16,703	21,470	27,186	33,830	39,077
Difference to petition	2,453	303	(1,617)	(3,050)	(2,117)

CONCLUDE petition budget for insurance appears reasonable

Utilities

Budget	22,440	33,332	45,358	58,076	64,869
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We reviewed the 22-23 budget against Bolinas-Stinson school district (approx 90 ADA)

	Bolinas	Est Healy	
Fire and Burglar Alarms	6,300	2,500	district has 2 sites
Gas	2,500	-	assume all electric
Electricity	18,500	9,250	lower to single site
Water	6,000	6,000	
Garbage disposal	7,250	7,250	
	40,550	25,000	
Petition budget estimate		22,440	
difference		2,560	

CONCLUDE petition budget for utilities appears reasonable

Facilities

Rent budget	132,000	165,000	226,243	292,553	331,885
# rooms needed	8	10	12	14	16
square foot at 960/each	7,680	9,600	11,520	13,440	15,360
Rate per square foot	24	25	25	26	27
Estimated cost	184,320	237,312	293,318	352,470	414,908
Difference to budget	52,320	72,312	67,075	59,917	83,023

CONCLUDE petition budget for rent appears understated

Housekeeping services	16,800	24,954	33,958	43,479	48,565
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Hourly rate including benefits	24.4	25	26	27	27
hours available	688.52	992.92	1,311.83	1,630.71	1,768.42
per day (190 days)	3.62	5.23	6.90	8.58	9.31
per room	0.45	0.52	0.58	0.61	0.58

CONCLUDE petition budget for housekeeping services appears reasonable

Student Enrollment

	2023-24	2024-25	2025-26	2026-27	2027-28			
TK	20	40	40	40	40	40	40	40
K	24	22	44	44	44	44	44	44
1	26	24	22	44	44	44	44	44
2	25	26	24	22	44	44	44	44
3	0	25	26	24	22	44	44	44
4	0	0	25	26	24	22	44	44
5	0	0	0	25	26	24	22	44
	95	137	181	225	244	262	282	304
annual growth		42	44	44	19	18	20	22
Estimated ADA	90.25	130.15	171.95	213.75	231.8	248.9	267.9	288.8

The requirement to maintain no more than 24:1 in K-3 does not apply to Charter Schools
The new TK adult to student ratios do apply

	Y1	Y2	Y3	Y4	Y5
District est TK ADA	165.12	165.12	165.12	165.12	165.12
Healy est TK ADA	19.00	38.00	38.00	38.00	38.00
Healy projection as %	12%	23%	23%	23%	23%
District est TK-3 ADA	2,059.79	2,070.05	2,070.05	2,070.05	
Healy est TK-3 ADA	90.25	130.15	148.20	165.30	
Healy projection as %	4%	6%	7%	8%	

	Healy Full enroll	Hamilton	Loma Verde	Total Schools in Souther	Healy proposal as %	as % of Hamilton
TK/K	84	68	70	138	61%	124%
1	44	53	65	118	37%	83%
2	44	58	65	123	36%	76%
3	44	52	62	114	39%	85%

The transitional kindergarten estimates used in the petition do not seem to acknowledge that TK is being phased in over a four year period and Charter would begin in year 3 of phase in
While LEAs may enroll age-ineligible students, they may not claim ADA for them

The charter indicates it will draw from Southern Novato schools. The charter would have a fairly significant impact on Hamilton in particular, as it would reduce the elementary age population while middle school would potentially remain unchanged

Unduplicated Percentage

	Healy	District	Hamilton	Loma Verde	Novato Charter
% Free & Reduced	63%	35%	65%	41%	15%
% English Learners	16%	17%	43%	33%	4%
% Unduplicated	63%	38%	70%	48%	15%

Higher unduplicated percentages in Marin County are highly correlated with % FRPM and higher % FRPM is highly correlated with higher %EL. The assumptions used for the budget do not appear to correlate with Novato demographics

Element 7: Student Population Balance

Page 132 of the petition
Efforts for a Racial and Ethnic, English Learner, and Special Education Student Balance
Healy School will strive, through recruitment and admissions practices, to achieve a balance of racial and ethnic students, special education students, and English learner students, including redesignated fluent English proficient students among its students that is reflective of the general population residing within the territorial jurisdiction of the District. Students shall be considered for admission without regard to the characteristics listed in Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, or association with an individual who has any of the aforementioned characteristics).

All Sites - preliminary draft 2021/22 data

	Hamilton Meadow Park	Loma Verde Elementary	Lu Sutton Elementary	Lynwood Elementary	Marin Oaks High	Nova Education Center	Novato High	NPS School Group	Olive Elementary	Pleasant Valley Elementary	Rancho Elementary	San Jose Intermediate	San Marin High	San Ramon Elementary	Sinaloa Middle	TOTAL
Free & Reduced Total	313	155	183	115	30	60	478	8	112	38	108	223	256	72	192	2343
% Free & Reduced	60%	39%	55%	45%	55%	35%	33%	21%	34%	10%	31%	40%	23%	17%	25%	33%
English Learners Total	222	130	145	120	8	18	183	6	68	15	69	89	63	53	61	1250
% English Learners	43%	33%	44%	47%	15%	11%	13%	15%	21%	4%	20%	16%	6%	13%	8%	17%
Enrollment	518	394	332	257	55	170	1448	39	326	387	352	555	1132	412	775	7152

All Sites - 2020/21 data

	Hamilton Meadow Park	Loma Verde Elementary	Lu Sutton Elementary	Lynwood Elementary	Marin Oaks High	Nova Education Center	Novato High	NPS School Group for Novato Unified	Olive Elementary	Pleasant Valley Elementary	Rancho Elementary	San Jose Intermediate	San Marin High	San Ramon Elementary	Sinaloa Middle
Free & Reduced Total	373	175	181	170	44	21	485	3	130	40	109	280	268	84	218
% Free & Reduced	67%	43%	54%	62%	61%	38%	34%	9%	38%	11%	32%	46%	24%	18%	27%
English Learners Total	223	128	138	132	7	0	149	5	77	12	63	116	65	64	87
% English Learners	40%	32%	41%	48%	10%	0%	10%	15%	23%	3%	18%	19%	6%	14%	11%
Enrollment	554	403	333	276	72	56	1433	34	340	366	344	606	1132	456	801

Staffing

	2023-24	2024-25	2025-26	2026-27	2027-28
School Director	1	1	1	1	1
Principal			1	1	1
Office Manager	1	1	1	1	1
Office Assistant	0.5	1	1	1	1
Finance Manager			1	1	1
School Counselor	0.4	0.4	1	1	1
Special Education Teacher		0.6	1	1	1
GE Teachers	4	6	8	10	11
Paraeducators	2	3	4	4	4 TK/K

Questions:

- 1 Who fulfills finance manager role in first 2 years? - see job description below
- 2 Who fulfills special education teacher's role in first year? Contracted services - see Special Education tab
- 3 Who provides English Learner Instruction?
- 5 Nursing and Medical (non IEP) - costs are budgeted beginning Y3 (contracted services). Who performs these functions in Y1 and Y2?

p. 123 Special Education Teacher
Special education teachers work with students with IEP's and help them progress on specific goals from their IEP. **The Special Education Teacher duties may be contracted to an individual or third-party services provider**, in which case the duties would be delivered by a non-employee, particularly during the first year of operation.

Total budgeted for special education (contracted) services \$103,750 in Y1

Analysis of Salary budget

	2023-24	2024-25	2025-26	2026-27	2027-28	
Teachers	236,000	413,440	583,098	740,422	838,038	
Stipend/Extra Duty	5,000	8,580	11,627	14,904	16,963	PD days
Counselor	30,000	31,200	81,120	84,365	87,739	
Principal			100,000	104,000	108,160	
Total certificated	271,000	453,220	775,845	943,691	1,050,900	
Instructional Aides	60,800	93,632	130,817	136,050	141,492	TK/K
After School Salaries	32,400	44,616	73,155	104,746	123,587	
Classified Administrators	120,000	124,800	199,792	207,784	216,095	
Office assistant	68,400	90,272	93,883	97,638	101,544	
Other classified	-	17,820	30,953	45,151	60,457	What is this?
Total classified	281,600	371,140	528,600	591,369	643,175	
Total salaries	552,600	824,360	1,304,445	1,535,060	1,694,075	
Benefits	120,667	183,943	292,870	342,209	376,564	
as % of salaries	22%	22%	22%	22%	22%	

Classified Administrators this line appears to represent the Director and the Fiscal Director beginning in Y3

Analysis of budget for teacher salaries

	2023-24	2024-25	2025-26	2026-27	2027-28
Teachers	236,000	413,440	583,098	740,422	838,038
FTE	4	6.6	9	11	12
Salary	\$ 59,000	\$ 62,642	\$ 64,789	\$ 67,311	\$ 69,837
		6%	3%	4%	4%

for comparison purposes, the lowest average teacher salary reported through the J-90 for 2020-21 was \$74,268 and the average county wide for elementary schools was \$83,804 Neither of the Charter Schools (Novato or Ross Valley Charter) submitted data In general all salaries appear low for the Marin school environment

Director	120,000	124,800	129,792	134,984	140,383
Fiscal Director			70,000	72,800	75,712

The budget for substitute teachers is included in contracted services at \$4,860 in Y1.

If assume 5% absence rate cost at \$125/day plus benefits at 10%

Estimated Cost	4,900	8,085	11,025	13,475	14,700
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Review assumptions for Extra Hire/Stipends

We understand instructional year will be 180 days and that the teachers contract includes 5 of the PD days (per Healy response to NUSD)

We understand the Stipend/Extra Duty line is for the additional PD

Petition page 30 indicates 15 days total PD

10 days 2023-24

Plus 3 days for all GE Teachers

Plus 2 days 1st year and for all new teachers thereafter)

Budget	\$ 5,000	\$ 8,580	\$ 11,627	\$ 14,904	\$ 16,963
FTE Gen Ed	4	6	8	10	11
FTE Sp Ed	0	0.6	1	1	1
10 Days all	40	66	90	110	120
less 5 days in contract	-20	-33	-45	-55	-60
3 days GE Teachers	12	18	24	30	33
2 days 1st yr & new	8	6	5	4	2
total extra days	40	57	74	89	95
Daily rate in budget	\$ 125	\$ 151	\$ 157	\$ 167	\$ 179

Conclude budget for PD time appears reasonable

School Finance Manager

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The School Finance Manager reports to the School Director. This position is responsible for financial operations, compliance, and school operations.

Requirements:

- Bachelor's degree required, and MA in Accounting or MBA preferred
- 6+ years of experience in financial operations, and a school environment preferable
- Ability to work independently as well as in a team
- Knowledge of Ed Code preferable (or willingness to learn)
- Strong communication and analytical skills
- Expertise with financial software packages and accounting

Finance Manager will:

- Work collaboratively with school leadership to make strategic business decisions
- Possess knowledge of (or willingness to learn) charter school finance
- Oversee planning, organization, and management of financial operations including school accounting and regulatory reporting and compliance, debt and revenue planning, budgeting, bank reconciliation, cash management, purchasing and investing, contracting, payroll and other business administration activities
- Develop multi-year budgets, and regular reporting
- Prepare monthly financial statements and analyses to use at school board meetings
- On a monthly basis present key issues in financial statements, and offer recommendations for changes to school operations
- Build relationships in the charter school and educational world (District, County, State)
- Work on special projects, as appropriate, such as facilities planning, and grant writing
- Interact with vendors related to financial management, and school operations
- Manage the budget and tracking for entire school

Maintain current knowledge of relevant financial management procedures, and practices

Curriculum

Grade	Name	Cost/student	
TK	Preschool Learning Foundations (this is a collection of knowledge and skills by age band)	No cost, but there is no curriculum here – these are skills and developmental milestones	
	Tools of the Mind (language, social emotional ELD, and Math) Cost: \$3750/classroom - access to eTools for 1 year \$749/classroom (unclear if this is annual access)	Tools of the Mind: \$3750/classroom - Core Year 1 and Assistance for PreK (am assuming they would use this for the TK) Full curriculum and tool 30 hours of PD School-year long subscription to eTools (portal) Technical Assistance sessions Curriculum/materials - need to purchase a 1-time Tools of the Mind Kit @ \$749.00/classroom. ? - is the 30 hours factored into the PD plan? ? - are the cost of iPads factored into budget ? - cost of wifi and maintenance for devices	
K	Tools of the Mind Cost: \$3750/classroom - access to eTools for 1 year One Time purchase: \$599/classroom/kit/subject - Literacy and Math available (so \$1,100 if purchasing 1 set each of literacy and math) California Wonders - Grade K	Tools of the Mind: \$3750/classroom - Core Year 1 and Assistance for PreK (am assuming they would use this for the TK) Full curriculum and tool 30 hours of PD School-year long subscription to eTools (portal) Technical Assistance sessions Curriculum/materials - need to purchase a 1-time Tools of the Mind Kit @ \$749.00/classroom. \$153.40/student	
Elementary	California Wonders - ELA - Gr 1 and 2-5 with 7 year subscription (unable to find a per/year price) Envision Math National Geographic Ladders program	\$274.76/student - Grade 1 \$141.56/student - Grade 2 - 5 \$667.50 /teachers guide - will need for each grade purchased \$138.00/student all grades (6 year license - digital and print) \$19.88/book/student - Amazon cost for book only. Unable to get quote for the cost that would include a digital subscription/license for online features. \$429.50 - Teachers edition per grade \$35/year/student - all grades Please note - these costs are the base level material and do not include ANY supplementary at all.	
ELD	California Wonders ELD Curriculum 6 year bundle per student	K - \$63.24 1- \$63.64 2 - \$93.12 3 - \$81.76 4 - \$79.12 5 - \$75.16	63.24 63.64 93.12 81.76 79.12 75.16
	Resilience Curriculum	What will be used? What cost?	

Professional Development

Identified area of need:	Estimated day(s)/ time	Detail	Cost - Estimate	El Dorado County SELPA
Tech Training	2	Aeries trainer assume all staff estimated by grade (nmitchell)		A wide range of training options across the bay area and state as well as zoom options - too many to ballpark
		Won't they also need SEIS training?	\$6,000.00	
		Certified Chromebook trainer	No cost - free resource	
Health and Safety	1	Assume District or MCOE? All staff	staff cost/time	
Special Education	1	Credentialed Expert/hourly rate Assume educators and admin Assume El Dorado County SELPA - *all training seems to require some level of travel - which will be necessary if the online modules do not cover all needed areas. Online learning as well	staff cost/time*	
		SELPA assume educators and admin	staff cost/time	
Mandate Reporting	0.5	Free state training all staff	staff cost/time	
ELD	2	Professional Expert assume admin, educators and paras + admin	\$5,000	
Culture/DEI	2	Professional Expert Dora Dome @ \$7000 Lori Watson @ \$7000 Zaretta Hammond @ \$7000	\$7,000	
Conflict Resolution	1	Online course Advancement Courses - PBIS @ \$450/ per person	\$450	
Healy Learning	1	Staff	staff cost/time	CPI - CSU East Bay, 1000 Broadway, Oakland
Project Based Learning	3	PBL @ \$700/person (year 1 4 educators + 2 paras)	\$4,200.00	
McKinney Vento	0.5	MCOE staff	staff cost/time	
LGBTQ+	0.5	Spahr center	\$1,350.00	
Social Emotional	0.5	Assume Healy Charter	staff cost/time	
Childhood Resilience	1.5	Experts from UCSF, Stanford, Harvard assumed cost/organization @ \$5000/expert/contract	\$10,000.00	
Suicide Awareness Training	0.6	MCOE staff	staff cost/time	
Human Resources compliance	1	ACSA or other resource assume admin, office manager, office assistant @ \$400/erson	\$1,200.00	
MCOE policies	0.3	Immigration?	No cost - free resource	
			\$29,200	

Anticipated Professional Development /time/days	Budget	\$	7,500
Paras 16.6	Budget understatement	\$	21,700
Educators (assumes counselor) 16.6			
Admin 17.5			
Office Staff 7.4			

Special Education

		2023-24	2024-25	2025-26	2026-27	2027-28
	special education teacher fte	0	0.6	1	1	1
	teacher salary		37,585	64,789	67,311	69,837
	counselor (assume 25% devoted to S	7,500	7,800	20,280	21,091	21,935
	benefits	1,650	9,985	18,715	19,449	20,190
	special education services	103,750	109,450	107,380	159,463	203,242
	total budgeted expense	112,900	127,235	146,375	200,003	245,366
p84	total student enrollment	95	137	181	225	244
	Special Education incidence 12%	11	16	22	27	29
	15%	14	21	27	34	37
FTE needed at 15% incidence						
	RSP Teacher 1:28	0.51	0.73	0.97	1.21	1.31
	Speech & Language 1:55 for 50%	0.13	0.19	0.25	0.31	0.33
	Occupational Therapy 1:55 for 50%	0.13	0.19	0.25	0.31	0.33
	Counseling 1:50 for 25%	0.07	0.10	0.14	0.17	0.18
		0.84	1.21	1.60	1.99	2.16
Contracted services salary & benefits per FTE		122,000	125,660	129,430	133,313	137,312
Estimated costs of service		102,391	152,088	206,962	264,991	295,990
Estimated unbudgeted costs		(10,509)	24,853	60,587	64,989	50,623
FTE needed at 12% incidence						
	RSP Teacher 1:28	0.41	0.59	0.78	0.96	1.05
	Speech & Language 1:55 for 50%	0.10	0.15	0.20	0.25	0.27
	Occupational Therapy 1:55 for 50%	0.10	0.15	0.20	0.25	0.27
	Counseling 1:50 for 25%	0.06	0.08	0.11	0.14	0.15
		0.67	0.97	1.28	1.59	1.72
Contracted services minimum \$100k/yr salary						
Estimated costs of service		81,913	121,671	165,570	211,993	236,792
Estimated unbudgeted costs		(30,987)	(5,564)	19,195	11,990	(8,575)
Average unbudgeted costs		(20,748)	9,645	39,891	38,490	21,024

The Charter School shall be solely responsible for selecting, contracting with, and overseeing all non-public schools and non-public agencies used to serve special education students.

In some circumstances, the Parties acknowledge that the District may be required to pay for or provide Healy School students with placements at locations other than at the Charter School's school site in order to provide them with a free appropriate public education. Such placements could include, without limitation, programs or services in other District schools, in other public districts within the SELPA, in a County Office of Education program, in a non-public school, at home, at a hospital, or in a residential program. When such programs or services are provided at District expense, the District shall be entitled to receive from the Charter School the pro rata share of all funding received for such student, including, without limitation, all ADA funds, based on the number of instructional days or minutes per day that the student is not at the Healy School site.

The Healy School will be responsible for all costs associated with educating students enrolled at the Healy School - regardless of final placement. The school will also retain the ADA and any associated ADA driven funding.

The District would not be responsible for placing students in specialized programs nor the cost associated with such placements

Expanded Learning Opportunity Program

p62 Healy School will offer an After School Education and Safety Program ("ASES") on campus with after-school tutoring, and partner with a local organization such as Marin YMCA in San Rafael to offer after-school education that meets students' needs, while simultaneously fulfilling these requirements. ASES is open to all students from TK-5, which are interested in the extended learning program.

p63 Intersession programming (Summer Break) will provide an array of options, but may include subjects such as: English Language Development, Maker's Camp, Theatre / Acting, and Creative Arts. Healy School can provide the District and/or County with a full schedule upon request. Our aim is to expand learning opportunities for all students at Healy School, and be a welcoming place for them to flourish.

	2023-24	2024-25	2025-26	2026-27	2027-28
state revenue		70,925	102,184	135,174	167,794
Expenses					
After School Salaries	32,400	44,616	73,155	104,746	123,587
benefits @ 22%	7,128	9,816	16,094	23,044	27,189
Before and After School Supplies	2,375	7,725	10,206	12,687	13,758
after school services		5,000	10,000	12,804	14,302
Total expenses	41,903	67,157	109,455	153,281	178,836
Excess of revenue over expenses	(41,903)	3,768	(7,271)	(18,107)	(11,042)
ELOP revenue		70,925	102,184	135,174	167,794
ELOP per ADA		545	594	632	724 per ADA
Novato's ELOP 21-22 rate		274	274	274	274 per ADA
3a Overstated ELOP Revenue		(35,264)	(55,070)	(76,607)	(104,281)

It would appear the budget is overstated for revenue when reviewing actual funding rates for 2022-23. The Governor's budget proposal does not propose any increase in the funding rates

TK/K enrolled	44	62	84	84	84
TK/K unduplicated	28	40	53	53	53
Student enrollment gr 1-5	51	75	97	141	160
Number unduplicated gr 1-5	33	48	62	89	101
Staff needed at 1:10 TK/K	3	4	6	6	6
staff needed at 1:20 1-5	2	3	4	5	6
total staff needed	5	7	10	11	12
180 days after school 3 hours	54,000	75,600	108,000	118,800	129,600
30 days summer 9 hours	27,000	37,800	54,000	59,400	64,800
benefits	17,820	24,948	35,640	39,204	42,768
total estimated salary costs	98,820	138,348	197,640	217,404	237,168
estimated salary budget understat	59,292	83,916	108,391	89,614	86,392

Expanded Learning Opportunities Program Plan Guide Transitional Kindergarten and Kindergarten Programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil[1]to-staff member ratio of no more than 10 to 1. (EC Section 46120[b][2][D]).

Appendix B-1:
Final Financial Analysis Updated
with Petitioner Responses

SUMMARY (Scenario A)

Healy School Budget Included with Petition	2023-24	2024-25	2025-26	2026-27	2027-28
Income	1,418,196	2,202,991	2,947,796	3,693,960	4,107,550
Expense	1,318,102	1,799,410	2,625,528	3,194,619	3,533,923
Net Income	100,094	403,581	322,268	499,341	573,627
Beginning Net Assets	-	100,094	503,675	825,943	1,325,284
Ending Net Assets	100,094	503,675	825,943	1,325,284	1,898,911
As % of expense	7.6%	28.0%	31.5%	41.5%	53.7%

MCOE Financial Analysis

Budget Risks to income

1 LCFF	(8,617)	(13,903)	(28,086)	(2,788)	28,066
3b SB740	(99,000)	(123,750)	(169,682)	(219,415)	(248,914)
Total income risks	(107,617)	(137,653)	(197,768)	(222,203)	(220,848)

Budget risks to expenses

6b Curriculum	28,163	14,125	2,302	5,487	(14,704)
6c Furniture and Equipment	8,200	4,100	4,100	2,050	2,050
6d Computers	33,206	3,650	(12,169)	28,768	2,488
6e Nutrition program	16,117	21,119	52,097	79,175	102,353
tab ELOP program costs	59,292	74,440	91,149	62,273	46,104
tab Special Education	1,691	37,419	73,530	78,320	64,354
tab Professional Development	21,700	21,700	21,700	21,700	21,700
Facility lease	80,736	108,898	140,506	143,314	176,917

Unbudgeted items identified from petitioner's oral and written responses to MCOE questions:

Marketing						oral responses
Translation						oral responses
Educational Consultants						written response B7
Finance manager			classified salary	classified salary	classified salary	written response E2
English learner instruction						written response E2
Health screenings		other classified	consultant	consultant	consultant	written response E3
Staff mentoring						written response E4
Non-core teaching positions	fundraising	fundraising	fundraising	fundraising	fundraising	written response E6
Other start up costs						written response Finance 3a
Leasehold improvements		n/a	n/a	n/a	n/a	written responses Facilities
Administrative services part time		other classified	other classified	other classified	other classified	written response Finance 5a
Total expense risks	249,105	285,450	373,216	421,087	401,262	
Change to net income	(356,722)	(423,103)	(570,984)	(643,290)	(622,110)	
Adjusted Net Income	(256,628)	(19,522)	(248,716)	(143,949)	(48,483)	
Beginning Net Assets	-	(256,628)	(276,150)	(524,866)	(668,815)	
Adjusted Ending Net Assets	(256,628)	(276,150)	(524,866)	(668,815)	(717,298)	
As % of expense	-16%	-13%	-18%	-18%	-18%	

PROJECTED REVENUE

1 LCFF

Entitlement	2023-24	2024-25	2025-26	2026-27	2027-28
Petition budget using 1st Interim COLA projections	1,132,926	1,726,006	2,301,199	2,868,636	3,167,272
Recalculate using Charter assumptions	1,140,014	1,742,694	2,324,291	2,938,515	3,241,317
Petition budget over/(understated)	(7,088)	(16,688)	(23,092)	(69,879)	(74,045)
Recalculate using Gov budget COLA projections	1,169,735	1,779,928	2,364,664	2,982,475	3,285,220
Petition budget over/(understated)	(36,809)	(53,922)	(63,465)	(113,839)	(117,948)
Recalculate using Gov budget COLA projections & 40% UPP	1,124,309	1,712,103	2,273,113	2,865,848	3,195,338
Petition budget over/(underst	8,617	13,903	28,086	2,788	(28,066)

COLA at first interim	5.38%	4.02%	3.72%	3.47%
COLA with Governor's budget	8.13%	3.54%	3.31%	3.23%

We recalculated the LCFF presented in the petition budget using the enrollment, attendance yield, and unduplicated pupil percentage provided by the Charter and using the published estimates for COLA that were available at first interim and found the petition budget appeared materially accurate for years 1-4 and materially understated in years 4 & 5

We then recalculated the LCFF using the estimated COLA factors included in the Governor's 2023-24 budget proposal. By this measure, LCFF would increase over the amount presented in the petition budget

The Charter's proposed budget assumes a 63% unduplicated percentage (UPP).

See review of enrollment and demographic assumptions

The UPP is unreasonably high for the identified target population and we therefore recalculated the LCFF using the estimated COLA factors included in the Governor's 2023-24 budget proposal but reduced the Charter's estimated unduplicated pupil count to 40% (Elementary school average for the district is 36% in 2022-23 per the CalPADS Fall 1 Certification). By this measure, LCFF revenue is overstated in all years presented except Y5.

2 Federal Revenue

	2023-24	2024-25	2025-26	2026-27	2027-28
Budget	86,928	137,234	182,745	231,793	263,781
annual budget growth		58%	33%	27%	14%
annual student growth		44%	32%	24%	8%

The charter's federal budget will be dependent on student demographics & is primarily Child Nutrition
See analysis of Nutrition budget below

Growth in Y2 (58% increase in revenue for a 44% increase in students) due to receipt of IDEA funds beginning Y2

3 Other State Revenue

	2023-24	2024-25	2025-26	2026-27	2027-28
Budget	133,813	246,694	340,909	440,699	510,760
annual budget growth		84%	38%	29%	16%
annual student growth		44%	32%	24%	8%

Growth in 2024-25 is due to adding budget for ELOP (70,925)

Budget is made up of

Child Nutrition	13,424	19,359	25,577	31,794	34,479
Lottery	21,389	30,846	40,752	50,659	54,937
Mandate block grant		1,814	2,714	3,657	4,637
ELOP		70,925	102,184	135,174	167,794
SB740 Charter Facility Grant Program	99,000	123,750	169,682	219,415	248,914
	133,813	246,694	340,909	440,699	510,761

Child Nutrition see analysis of Child Nutrition budget below

ELOP see ELOP tab for detailed analysis

Calculate per ADA rates for the following:

Lottery	237	237	237	237	237
Mandate block grant		14	16	17	20

State revenue estimates appear reasonable based on projected ADA and UPP.

3b SB740 Charter Facility Grant Program

Eligibility for this revenue stream is based on a minimum of 55% of the student population qualifying for free or reduced price meals OR being located in an elementary school area serving 55% or more low-income students. The grant program provides 75% of the cost of rent/lease up to a cap per ADA

Cap of funding per ADA of \$ 1,117 2018-19 rate - is indexed for COLA
<https://www.cde.ca.gov/re/pr/csfgp.asp> no longer administered by CDE
 California School Finance Authority <https://www.treasurer.ca.gov/csfa/csfgp/index.asp>

We recalculated the estimated revenues and agree with the results based on the assumptions provided, however, the charter would have to draw almost entirely from Hamilton to achieve the % FRPM which seems unlikely. Alternately the charter could locate in the Hamilton neighborhood to qualify, however no such facilities were presented by the petitioner

See review of enrollment and demographic assumptions

For this reason, we consider the entire revenue estimate to be questionable

	2023-24	2024-25	2025-26	2026-27	2027-28
SB740 revenue	99,000	123,750	169,682	219,415	248,914
Rents/Lease expense	132,000	165,000	226,243	292,553	331,885
	75%	75%	75%	75%	75%
Amount per ADA	1,096.95	950.83	986.81	1,026.50	1,073.83

We also note the rents/leases program is oversubscribed and per the 2020-21 Annual Report, awards were pro-rated at 92.64%, thus, should the charter qualify for the program, the minimum at risk is as follows

Pro-rated at 92.64%	91,714	114,642	157,193	203,266	230,594
revenue loss	\$ 7,286	\$ 9,108	\$ 12,489	\$ 16,149	\$ 18,320

See Facilities tab for detailed review

4 Other Local Revenue	2023-24	2024-25	2025-26	2026-27	2027-28
Budget	64,529	93,057	122,944	152,831	165,737
annual budget growth		44%	32%	24%	8%
annual student growth		44%	32%	24%	8%
Amount per ADA	715	715	715	715	715

This budget represents the transfer of Special Education Apportionment the Charter anticipates receiving from the Charter SELPA and appears reasonable given current rates per ADA for AB602

PROJECTED EXPENSES

5 Salaries and benefits	2023-24	2024-25	2025-26	2026-27	2027-28
Certificated	271,000	453,220	775,845	943,691	1,050,901
Classified	281,600	371,140	528,600	591,369	643,174
Benefits	120,667	183,943	292,870	342,209	376,564
Total	673,267	1,008,303	1,597,315	1,877,269	2,070,639
Benefits as % of salaries	22%	22%	22%	22%	22%

Substitute Teachers

The budget for substitute teachers is included in contracted services

Substitute teachers should be reflected in salaries as you cannot contract for this service RESOLVED

Petitioner clarified for us that charter schools may contract for substitutes.

Assume 5% absence rate cost at \$125/day plus benefits at 10%

\$	4,900	\$	8,085	\$	11,025	\$	13,475	\$	14,700
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Cost in budget (4,860) in year 1 appears reasonable

6 Books and Supplies	2023-24	2024-25	2025-26	2026-27	2027-28
	181,326	211,097	284,731	351,392	361,017
Core curricular materials	9,713	12,629	15,320	20,545	22,872
Books and ref materials	4,750	6,850	9,050	11,250	12,200
Student materials	12,697	18,310	24,191	30,071	32,611
Office Supplies	4,750	6,850	9,050	11,250	12,200
Custodial supplies	3,325	4,795	6,335	7,875	8,540
Food (non nutrition program)	450	743	968	1,193	1,305
PE & Sports Equipment	3,325	4,795	6,335	7,875	8,540
Before and After School Supplie	2,375	7,725	10,206	12,687	13,758
All other supplies	5,775	7,710	9,736	11,764	12,668
Non-capitalized equipment	56,900	28,150	43,369	48,338	29,812
Nutrition program	77,266	112,540	150,172	188,544	206,510
	181,326	211,097	284,732	351,392	361,016

Where are initial start up costs to stock the school with books and materials?

Per petitioner response included in Books, Supplies, & Materials

6b Core Curricular Materials

The budget appears extremely low for the curriculum being proposed

Budget	\$	9,713	\$	12,629	\$	15,320	\$	20,545	\$	22,872
Enrollment		95		137		181		225		244
Per pupil	\$	102.24	\$	92.18	\$	84.64	\$	91.31	\$	93.74

Analysis of first year budget

See curriculum tab for detailed analysis of curriculum cited in the petition

all prices confirmed by

L Trahan, except as noted

Core subject area	Curriculum	Price per Unit	Pupils	
1 ELA	Ca Wonders	274.76	26	
2-5 ELA	Ca Wonders	141.56	51	
K-5 Math	K-5 enVision	150	26	estimated cost
gr 3,4,5 History/Social Studies	NG Ladders	192.88	0	
History/Social Studies	NG Teachers	1097		
TK-5 Science	enVision Interact	100	95	estimated cost
TK-K	Tools of the Mind			
ELD		73.33	15.2	

Analysis of first year budget

Estimated Cost

Core subject area	2023-24	2024-25	2025-26	2026-27	2027-28
ELA	7,143.76	-	-	6,044.72	-
ELA	7,219.56	7,143.76	6,594.24	6,044.72	6,044.72
Math	3,900.00	-	-	3,300.00	-
History/Social Studies	-	4,822.00	5,014.88	4,629.12	-
History/Social Studies		1,097.00	1,097.00	1,097.00	
Science	9,500.00	4,200.00	4,400.00	4,400.00	1,900.00
	8,998.00	8,998.00			
ELD	1,114.62	492.78	516.24	516.24	222.92
	37,875.94	26,753.54	17,622.36	26,031.80	8,167.64

initial budget	\$	9,713	\$	12,629	\$	15,320	\$	20,545	\$	22,872
	budget understated	\$ 28,163	\$ 14,125	\$ 2,302	\$ 5,487	\$ (14,704)				

These estimates do not include any allowance for Resilience curricular materials

Pupil growth

Core subject area	Curriculum	Y2	Y3	Y4	Y5
1 ELA	Ca Wonders	0	0	22	0
2-5 ELA	Ca Wonders	26	24	22	22
Math	K-5 enVision	0	0	22	0
History/Social Studies	NG Ladders	25	26	24	0
Science	enVision Interact	42	44	44	19

6c Furniture and Equipment

Classroom Furniture and Equipment	\$25,000	\$ 12,000	\$ 12,000	\$ 6,000	\$ 6,000
Other furniture and equipment	31,900	16,150	31,369	42,338	23,812
	56,900	28,150	43,369	48,338	29,812

Per classroom	Cost	
24 student desks and chairs	6000	
teacher desk, chair	1800	
whiteboard	500	
	8300	x 4 classes
		33200
	-2050	per class short
Budget understated	\$8,200	

	2023-24	2024-25	2025-26	2026-27	2027-28
new classes	\$8,200	4100	4100	2050	2050
budget shortfall per year	8200	4100	4100	2050	2050

6d Computers (included in non-capitalized equipment)

Budget (other furniture & Equipment)	31,900	16,150	31,369	42,338	23,812
The charter will need I-Pads for T-K and K which are more costly than chromebooks					
\$600 per I-PAD	26,400	10,800	13,200	-	-
chromebooks @250/ea	23,706	6,000		4,500	5,000
replacements				50,106	16,800
teacher computers @ \$1,500	6,000	3,000	3,000	1,500	1,500
replacements				6,000	3,000
Admin & Office staff	4,500		3,000	4,500	
Counselor, SpEd, After School	4,500			4,500	
Total estimated cost for computers	65,106	19,800	19,200	71,106	26,300
Budget shortfall	33,206	3,650	(12,169)	28,768	2,488

Cost estimates confirmed by N Mitchell, Sr Director Information Technology

The budget also doesn't appear to include costs to equip the school office, the director's office, or other ancillary staff

6e Nutrition Program Food and Supplies

	2023-24	2024-25	2025-26	2026-27	2027-28
Budget	77,266	112,540	150,172	188,544	206,510
divided by 180 days	429.26	625.22	834.29	1,047.47	1,147.28
enrollment	95	137	181	225	244
cost per student	4.52	4.56	4.61	4.66	4.70
Estimated Cost					
Breakfast per unit	2.50	2.63	2.76	2.89	3.04
Lunch per unit	5.00	5.25	5.51	5.79	6.08
Total cost	124,688	188,803	261,913	341,861	389,266
Expense understated	47,422	76,263	111,741	153,317	182,756

however, it appears the revenue budget is also understated:

Federal budget	64,830	83,492	123,518	153,545	166,511
State budget	13,424	19,359	25,577	31,794	34,479
	78,254	102,851	149,095	185,339	200,990
Daily rate per pupil	4.71	4.29	4.71	4.71	4.71

Under Universal Meals, LEAs are essentially reimbursed the federal rates for all students

Breakfast rate	2.26	2.26	2.26	2.26	2.26
Lunch rate	4.33	4.33	4.33	4.33	4.33
Total daily rate	6.59	6.59	6.59	6.59	6.59
Understated revenue	31,305	55,144	59,643	74,142	80,403

Net budget understated costs	16,117	21,119	52,097	79,175	102,353
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7

	2023-24	2024-25	2025-26	2026-27	2027-28
Services & Other Expenses	436,010	561,032	743,483	965,959	1,102,267

p 203-204 budget narrative

General Liability Insurance is projected at \$150 per student in FY 24 based on current rates, increasing annually with student growth.

Healy School will pay 1% of LCFF revenues for oversight to its authorizing district, Novato Unified School District.

Healy School will utilize a back-office service provider to support financial and operational needs of the school. Services include accounts payable, accounting, budgeting and finance, and payroll. The cost for these services is \$40,000 in the first year of operations.

Other significant expenses include Equipment Leases (\$5,400), Office Furniture (\$5,000), Field Trips (\$3,825), Legal Fees (\$8,000), Audit (\$4,500), Professional Development (\$7,500), Technology Consultants (\$7,500), School Information System & non-instructional Software (\$12,875), Advertising & Outreach (\$8,000), [Substitute Teachers \(\\$4,860\)](#), Communications including internet & website (\$17,080) in year one.

7 Services & Other Expenses	2023-24	2024-25	2025-26	2026-27	2027-28
travel and conference	2,000	3,300	8,600	10,600	11,600
dues and memberships	900	1,269	1,675	2,105	2,337
general insurance	14,250	21,167	28,803	36,880	41,194
utilities	22,440	33,332	45,358	58,076	64,869
housekeeping services	16,800	24,954	33,958	43,479	48,565
Rent	132,000	165,000	226,243	292,553	331,885
equipment lease	5,400	6,818	8,350	10,691	11,942
vendor repairs	4,200	6,239	8,489	10,870	12,141
field trips and pupil transportat	3,825	5,625	14,550	18,630	20,809
legal	8,000	11,883	16,170	20,704	23,126
audit	4,500	9,270	9,548	9,835	10,130
advertisement and recruitment	8,000	8,240	8,487	8,742	9,004
substitute teachers	4,860	7,219	9,823	12,578	14,049
special education services	103,750	109,450	107,380	159,463	203,242
after school services		5,000	10,000	12,804	14,302
other student instructional services		5,000	6,804	8,712	9,731
PD Consultants and Tuition	7,500	11,140	15,160	19,410	21,681
Nursing and Medical (non IEP)			20,000	25,000	25,000
All other consultants and servic	47,500	66,470	90,453	115,815	129,362
non instructional software	12,875	13,028	14,586	16,225	17,247
oversight fees	11,329	17,260	23,012	28,686	31,673
SELPA fees	3,549	4,722	4,902	6,141	6,785
all other expenses	5,252	7,502	9,992	12,605	13,884
office phone	1,200	1,236	1,273	1,311	1,351
mobile phone	1,800	1,854	1,910	1,967	2,026
internet	6,000	8,912	12,128	15,528	17,345
website hosting	7,000	3,539	3,646	3,755	3,868
postage and shipping	1,080	1,604	2,183	2,795	3,122
Total operating services	436,010	561,033	743,483	965,960	1,102,270

check oversight fees as 1% of LCFF

LCFF Revenue	1,132,926	1,726,006	2,301,198	2,868,637	3,167,272
1%	11,329	17,260	23,012	28,686	31,673
Agrees to petition budget	TRUE	TRUE	TRUE	TRUE	TRUE

All other consultants and servi	47,500	66,470	90,453	115,815	129,362
annual growth		40%	36%	28%	12%
enrollment	95	137	181	225	244
annual growth		44%	32%	24%	8%
backoffice	40,000	55,975	76,171	97,528	108,936
technology	7,500	10,495	14,282	18,287	20,426
	47,500	66,470	90,453	115,815	129,362

BackOffice provider \$40,000; \$7,500 for technology consultant per narrative p203-204

Communications

Requested review of communications costs and technology consultant from our IT Director:

That all seems reasonable with the assumption that the internet/phones are small office/home office type setup, meaning Comcast Business internet (with phone), something like that. Tech support would be minimal so that cost looks accurate.

Field Trips and Pupil Transportation

Budget	3,825	5,625	14,550	18,630	20,809
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Does this budget include special education home to school transportation? While it is difficult to estimate such costs, it would appear this estimate is insufficient - the amount budgeted is likely sufficient for field trips but not for both functions.

Petitioner responded that yes, all IEP required transportation would be provided and was included in the budget. Our analysis stands that the allowance is likely low

General Insurance

We compared the rates above with the rates for the liability program operated by MSIA for all districts in Marin County for 2022-23. Our rates are kept low by retaining the first \$25k of loss. We further note the 2022-23 rates did NOT include a sizeable increase in the cost of cybersecurity

We fully anticipate cybersecurity and Child Sexual Abuse and Molestation coverage will continue to increase at a higher rate than seen in the past

Our 22-23 rates (without the cyber increase) were 11% above the prior year

Budget	14,250	21,167	28,803	36,880	41,194
ADA	90.25	130.15	171.95	213.75	231.8
cost per ADA	157.89	162.64	167.51	172.54	177.71
		3%	3%	3%	3%
MSIA liability rates for 2022-23	70.55	77.61	85.37	93.91	103.30
		10%	10%	10%	10%
Excess Cyber flat	10,336	11,369.60	12,506.56	13,757.22	15,132.94

Using an inflation factor of 10% and both a per ADA amount plus flat excess cyber policy:

Estimated budget	16,703	21,470	27,186	33,830	39,077
Difference to petition	2,453	303	(1,617)	(3,050)	(2,117)

CONCLUDE petition budget for insurance appears reasonable

Utilities

Budget	22,440	33,332	45,358	58,076	64,869
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We reviewed the 22-23 budget against Bolinas-Stinson school district (approx 90 ADA)

	Bolinas	Est Healy	
Fire and Burglar Alarms	6,300	2,500	district has 2 sites
Gas	2,500	-	assume all electric
Electricity	18,500	9,250	lower to single site
Water	6,000	6,000	
Garbage disposal	7,250	7,250	
	<u>40,550</u>	<u>25,000</u>	
Petititon budget estimate		<u>22,440</u>	
difference		<u>2,560</u>	

CONCLUDE petition budget for utilities appears reasonable

Facilities

Rent budget	132,000	165,000	226,243	292,553	331,885
# rooms needed	8	10	13	15	17
square foot at 960/each	7,680	9,600	12,480	14,400	16,320
Rate per square foot	28	29	29	30	31
Estimated cost	<u>212,736</u>	<u>273,898</u>	<u>366,749</u>	<u>435,867</u>	<u>508,802</u>
Difference to budget	80,736	108,898	140,506	143,314	176,917

CONCLUDE petition budget for rent appears understated

See facilities tab for detailed review

Housekeeping services	16,800	24,954	33,958	43,479	48,565
Hourly rate including benefits	24.4	25	26	27	27
hours available	688.52	992.92	1,311.83	1,630.71	1,768.42
per day (190 days)	3.62	5.23	6.90	8.58	9.31
per room	0.45	0.52	0.53	0.57	0.55

CONCLUDE petition budget for housekeeping services appears reasonable

FINAL Budget Analysis

SCENARIO B - QUALIFIES FOR SB740 CSFGP, using lowest cost for facility

	2023-24	2024-25	2025-26	2026-27	2027-28
Income	1,418,196	2,202,991	2,947,796	3,693,960	4,107,550
Expense	1,318,102	1,799,410	2,625,528	3,194,619	3,533,923
Net Income	100,094	403,581	322,268	499,341	573,627
Beginning Net Assets	-	100,094	503,675	825,943	1,325,284
Ending Net Assets	100,094	503,675	825,943	1,325,284	1,898,911
As % of expense	7.6%	28.0%	31.5%	41.5%	53.7%

Budget Risks to income

1 LCFF	(8,617)	(13,903)	(28,086)	(2,788)	28,066
3b SB740					
Total income risks	(8,617)	(13,903)	(28,086)	(2,788)	28,066

Budget risks to expenses

6a Other supplies					
6b Curriculum	28,163	14,125	2,302	5,487	(14,704)
6c Furniture and Equipment	8,200	4,100	4,100	2,050	2,050
6d Computers	33,206	3,650	(12,169)	28,768	2,488
6e Nutrition program	16,117	21,119	52,097	79,175	102,353
tab ELOP program costs	59,292	74,440	91,149	62,273	46,104
tab Special Education	1,691	37,419	73,530	78,320	64,354
tab Professional Development	21,700	21,700	21,700	21,700	21,700

Facility lease						oral responses
Marketing						oral responses
Translation						written response B7
Educational Consultants						written response E2
Finance manager			classified salary	classified salary	classified salary	written response E2
English learner instruction						written response E2
Health screenings		other classified	consultant	consultant	consultant	written response E3
Staff mentoring						written response E4
Non-core teaching positions	fundraising	fundraising	fundraising	fundraising	fundraising	written response E6
Other start up costs						written response Finance 3a
leasehold improvements		n/a	n/a	n/a	n/a	written response Facilities
Administrative services part time		other classified	other classified	other classified	other classified	written response Finance 5a
Total expense risks	168,369	176,553	232,710	277,773	224,345	
Change to net income	(176,986)	(190,456)	(260,796)	(280,561)	(196,279)	
Adjusted Net Income	(76,892)	213,125	61,472	218,780	377,348	
Beginning Net Assets	-	(76,892)	136,234	197,706	416,485	
Adjusted Ending Net Assets	(76,892)	136,234	197,706	416,485	793,834	
As % of expense	-5%	7%	7%	12%	21%	

In an attempt to isolate the various risks the proposed charter faces we prepared this hypothetical scenario assuming the Charter qualifies for Charter Facilities Grant Program revenues by locating in the Hamilton area. This scenario therefore assumes the petition budget line items for rent and SB740 revenue are reasonable.

This analysis makes clear that obtaining certainty about facilities is critical to the charter's establishment. If enrollment holds as projected and facilities do not draw down on the budget, the proposed charter could be viable beginning in year 2. However, as noted elsewhere, this analysis contemplates the reasonability of the items included in the budget but does NOT include an analysis of the cost of missing budget lines - for example, the leasehold improvements that would need to be made to a commercial building to make it fit for purpose, English learner instruction, arts and music program, health screening, physical education specialists, translation services, education consultants, administrative training, and marketing.

The omissions from the budget are more troubling in light of the lack of a finance manager in the first two years of operation. Managing a budget with this little room for error requires precision, and significant risk management. We are also concerned that the salary of \$70,000 included for a finance manager in year 3 is significantly below market rates and will therefore prove difficult to fill appropriately.

Student Enrollment

	2023-24	2024-25	2025-26	2026-27	2027-28			
TK	20	40	40	40	40	40	40	40
K	24	22	44	44	44	44	44	44
1	26	24	22	44	44	44	44	44
2	25	26	24	22	44	44	44	44
3	0	25	26	24	22	44	44	44
4	0	0	25	26	24	22	44	44
5	0	0	0	25	26	24	22	44
	95	137	181	225	244	262	282	304
annual growth		42	44	44	19	18	20	22
Estimated ADA	90.25	130.15	171.95	213.75	231.8	248.9	267.9	288.8

The requirement to maintain no more than 24:1 in K-3 does not apply to Charter School:

The new TK adult to student ratios do apply

	Y1	Y2	Y3	Y4	Y5	
District est TK ADA	165.12	165.12	165.12	165.12	165.12	District LCFF estimate for 1st Interim 2022-23
Healy est TK ADA	19.00	38.00	38.00	38.00	38.00	
Healy projection as %	12%	23%	23%	23%	23%	

District est TK-3 ADA	2,059.79	2,070.05	2,070.05	2,070.05
Healy est TK-3 ADA	90.25	130.15	148.20	165.30
Healy projection as %	4%	6%	7%	8%

	Healy Full enroll	Hamilton	Loma Verde	Total Schools in So Novato	Healy proposal as %	as % of Hamilton
TK/K	84	68	70	138	61%	124%
1	44	53	65	118	37%	83%
2	44	58	65	123	36%	76%
3	44	52	62	114	39%	85%

The transitional kindergarten estimates used in the petition do not seem to acknowledge that

TK is being phased in over a four year period and Charter would begin in year 3 of phase ir

While LEAs may enroll age-ineligible students, they may not claim ADA for them

The petition assumptions also do not seem to acknowledge that Kindergarten classes are rarely the same size as the 1st grade. The assumption that the school could grow by 40 incoming TK students annually is therefore at risk

The charter indicates it will draw from Southern Novato schools. The charter would have a fairly significant impact on Hamilton in particular, as it would reduce the elementary age population while middle school would potentially remain unchanged

Unduplicated Percentage

From DataQuest (www.cde.ca.gov) 2021-22 Enrollment Data by school and subgroup

	Novato				
	Healy	District	Hamilton	Loma Verde	Charter
% Free & Reduced	63%	35%	65%	41%	15%
% English Learners	16%	17%	43%	33%	4%
% Unduplicated	63%	38%	70%	48%	15%

Higher unduplicated percentages in Marin County are highly correlated with % FRPM and higher % FRPM is highly correlated with higher %EL. The assumptions used for the budget do not appear to correlate with Novato demographics

All Sites Fall 1 Certification 2022/23

	Hamilton Meadow Park	Loma Verde Elementary	Lu Sutton Elementary	Lynwood Elementary	Marin Oaks High	Nova Education Center	Novato High	NPS School Group	Olive Elementary	Pleasant Valley Elementary	Rancho Elementary	San Jose Intermediate	San Marin High	San Ramon Elementary	Sinaloa Middle	TOTAL
Free & Reduced Total	307	181	186	116	52	32	494	16	125	36	112	216	231	71	177	2352
% Free & Reduced	58%	42%	54%	42%	61%	39%	34%	31%	36%	8%	33%	43%	20%	17%	24%	33%
English Learners Total	227	133	131	111	27	3	180	7	76	16	83	89	77	46	55	1261
% English Learners	43%	31%	38%	40%	32%	4%	12%	14%	22%	4%	24%	18%	7%	11%	7%	18%
Enrollment	531	427	347	276	85	82	1458	51	352	433	344	500	1144	427	745	7202

All Sites - Fall 1 Certification 2021/22

	Hamilton Meadow Park	Loma Verde Elementary	Lu Sutton Elementary	Lynwood Elementary	Marin Oaks High	Nova Education Center	Novato High	NPS School Group for Novato Unified	Olive Elementary	Pleasant Valley Elementary	Rancho Elementary	San Jose Intermediate	San Marin High	San Ramon Elementary	Sinaloa Middle	TOTAL
Free & Reduced Total	313	155	183	115	30	60	478	8	112	38	108	223	256	72	192	2343
% Free & Reduced	60%	39%	55%	45%	55%	35%	33%	21%	34%	10%	31%	40%	23%	17%	25%	33%
English Learners Total	222	130	145	120	8	18	183	6	68	15	69	89	63	53	61	1250
% English Learners	43%	33%	44%	47%	15%	11%	13%	15%	21%	4%	20%	16%	6%	13%	8%	17%
Enrollment	518	394	332	257	55	170	1448	39	326	387	352	555	1132	412	775	7152

Element 7: Student Population Balance

Page 132 of the petition

Efforts for a Racial and Ethnic, English Learner, and Special Education Student Balance

Healy School will strive, through recruitment and admissions practices, to achieve a balance of racial and ethnic students, special education students, and English learner students, including redesignated fluent English proficient students among its students that is reflective of the general population residing within the territorial jurisdiction of the District. Students shall be considered for admission without regard to the characteristics listed in Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, or association with an individual who has any of the aforementioned characteristics).

Staffing

	2023-24	2024-25	2025-26	2026-27	2027-28
School Director	1	1	1	1	1
Principal			1	1	1
Office Manager	1	1	1	1	1
Office Assistant	0.5	1	1	1	1
Finance Manager			1	1	1
School Counselor	0.4	0.4	1	1	1
Special Education Teacher		0.6	1	1	1
GE Teachers	4	6	8	10	11
Paraeducators	2	3	4	4	4 TK/K

Questions:

1

Who fulfills finance manager role in first 2 years? - see job description below

Petitioner responded: "School Director will take responsibility for the higher level financial management such as risk management, financial planning and strategy, and facilities oversight during the first two years in coordination with the back-office provider. School director will be in a mentorship program with other charter school leaders who have successfully created sustainable and prosperous new schools, so they are working with support of a larger network of school leaders."

From the response, it would appear the question is RESOLVED, however, it also leads to the conclusion also that the Director has been selected, but has not been named in the petition. We further note the School Director will also act as the Principal in the first two years of operation.

2

Who fulfills special education teacher's role in first year? Contracted services - see Special Education tab. RESOLVED

3

Who provides English Learner Instruction? General Education teachers

Given the target population described in the petition (Southern Novato) we remain concerned that insufficient staff have been budgeted for EL services.

5

Nursing and Medical (non IEP) - costs are budgeted beginning Y3 (contracted services).

Who performs these functions in Y1 and Y2? Petitioner responded will hire - but there is no budget for other classified salaries in Y1 and no allowance in contracted services. Conclude this cost is not in budget.

p. 123 Special Education Teacher

Special education teachers work with students with IEP's and help them progress on specific goals from their IEP. The Special Education Teacher duties may be contracted to an individual or third-party services provider, in which case the duties would be delivered by a non-employee, particularly during the first year of operation.

Total budgeted for special education (contracted) services \$103,750 in Y1

Analysis of Salary budget

	2023-24	2024-25	2025-26	2026-27	2027-28	
Teachers	236,000	413,440	583,098	740,422	838,038	
Stipend/Extra Duty	5,000	8,580	11,627	14,904	16,963	PD days
Counselor	30,000	31,200	81,120	84,365	87,739	
Principal			100,000	104,000	108,160	
Total certificated	271,000	453,220	775,845	943,691	1,050,900	
Instructional Aides	60,800	93,632	130,817	136,050	141,492	TK/K
After School Salaries	32,400	44,616	73,155	104,746	123,587	
Classified Administrators	120,000	124,800	199,792	207,784	216,095	
Office assistant	68,400	90,272	93,883	97,638	101,544	
Other classified	-	17,820	30,953	45,151	60,457	
Total classified	281,600	371,140	528,600	591,369	643,175	
Total salaries	552,600	824,360	1,304,445	1,535,060	1,694,075	
Benefits	120,667	183,943	292,870	342,209	376,564	
as % of salaries	22%	22%	22%	22%	22%	

Classified Administrators this line appears to represent the Director and the Fiscal Director beginning in Y3

Other classified salaries Appears to be for administrative salaries from petitioner written response

Analysis of budget for teacher salaries

	2023-24	2024-25	2025-26	2026-27	2027-28
Teachers	236,000	413,440	583,098	740,422	838,038
FTE	4	6.6	9	11	12
Salary	\$ 59,000	\$ 62,642	\$ 64,789	\$ 67,311	\$ 69,837
		6%	3%	4%	4%

for comparison purposes, the lowest average teacher salary reported through the J-90 for 2020-21 was \$74,268 and the average county wide for elementary schools was \$83,804

Neither of the Charter Schools (Novato or Ross Valley Charter) submitted data

In general all salaries appear low for the Marin school environment

Director	120,000	124,800	129,792	134,984	140,383
Fiscal Director			70,000	72,800	75,712

The salary for fiscal director is extremely low for Marin

The budget for substitute teachers is included in contracted services at \$4,860 in Y1.

If assume 5% absence rate cost at \$125/day plus benefits at 10%

Estimated Cost	4,900	8,085	11,025	13,475	14,700
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Review assumptions for Extra Hire/Stipends

We understand instructional year will be 180 days and that the teachers contract includes 5 of the PD days (per Healy response to NUSD)

We understand the Stipend/Extra Duty line is for the additional PD

Petition page 30 indicates 15 days total PD

10 days 2023-24

Plus 3 days for all GE Teachers

Plus 2 days 1st year and for all new teachers thereafter)

Budget	\$	5,000	\$	8,580	\$	11,627	\$	14,904	\$	16,963
FTE Gen Ed		4		6		8		10		11
FTE Sp Ed		0		0.6		1		1		1
10 Days all		40		66		90		110		120
less 5 days in contract		-20		-33		-45		-55		-60
3 days GE Teachers		12		18		24		30		33
2 days 1st yr & new		8		6		5		4		2
total extra days		40		57		74		89		95
Daily rate in budget	\$	125	\$	151	\$	157	\$	167	\$	179

Conclude budget for PD time appears reasonable

School Finance Manager

p121

The School Finance Manager reports to the School Director. This position is responsible for financial operations, compliance, and school operations.

Requirements:

- Bachelor's degree required, and MA in Accounting or MBA preferred
- 6+ years of experience in financial operations, and a school environment preferable
- Ability to work independently as well as in a team
- Knowledge of Ed Code preferable (or willingness to learn)
- Strong communication and analytical skills
- Expertise with financial software packages and accounting

Finance Manager will:

- Work collaboratively with school leadership to make strategic business decisions
- Possess knowledge of (or willingness to learn) charter school finance
- Oversee planning, organization, and management of financial operations including school accounting and regulatory reporting and compliance, debt and revenue planning, budgeting, bank reconciliation, cash management, purchasing and investing, contracting, payroll and other business administration activities
- Develop multi-year budgets, and regular reporting
- Prepare monthly financial statements and analyses to use at school board meetings
- On a monthly basis present key issues in financial statements, and offer recommendations for changes to school operations
- Build relationships in the charter school and educational world (District, County, State)
- Work on special projects, as appropriate, such as facilities planning, and grant writing
- Interact with vendors related to financial management, and school operations
- Manage the budget and tracking for entire school

Maintain current knowledge of relevant financial management procedures, and practices

Facilities Plan

p 182 Governing Law: “The facilities to be used by the charter school. The description of the facilities to be used by the charter school shall specify where the charter school intends to locate” Education Code Section 47605(g)

Healy School will be located within the geographic boundaries of Novato Unified School District. Specifically, we are aiming to locate in the Southwest or Southeast section of Novato, California; however, we haven’t confirmed a precise location yet.

The exact address is still to be determined. If we are unable to obtain ideal space in a privately owned facility or one is not available or not feasible due to cost or location constraints, HS will apply to NUSD for Prop 39 facilities by the legal deadline, to ensure that District allocated space is available if a suitable private facility cannot be located and secured.

We have budgeted for a privately leased space and included the costs for renting the space in the detailed budget, as well as vendor repairs (See Appendix 4).

We are actively searching for feasible (space, safety, transportation, cost) private facilities options in the area. We are working with experienced realtors, developers, and financiers to identify and secure an appropriate space. Ultimately, we hope to purchase or secure a long-term lease for a permanent facility.

HS will work with private donors and lenders, and pursue appropriate facility financing options, including financing and reimbursement programs offered by the state and local governments.

We intend to apply for the Charter School Facilities Grant Program funding.

HS will meet state and local building codes, federal ADA access requirements, fire and safety regulations, and all other requirements of a similar organization serving public school students in the State of California. A health and safety plan, and disaster preparedness plan will be located on-site, and Healy School will receive all necessary and proper inspections, certificates, and permits prior to school opening.

FINAL REVIEW

The petition assumes 75% of lease costs will be reimbursed through the Charter Facility Grant Program Eligibility for the program is based on at least 55% of the student population being low income OR the Charter is located in an elementary school area of at least 55% low income and the charter gives preference in enrollment to students in that elementary school area

Based on Fall 1 Certification for 2022-23, the only elementary school in Novato Unified School District with a low income student percentage of at least 55% is Hamilton Elementary School

At the public hearing we heard from Hamilton School parents that they categorically do NOT want a charter school in their neighbourhood and are uninterested in sending their students to the proposed charter school.

Based on the Charter's lack of popularity in the Hamilton area, the school is unlikely to draw a population that meets the eligibility requirements for the CSGP program

Although we were able to find commercial real estate for lease in the Hamilton area, The assumption the charter school will be eligible for CSGP funding is at risk

When we asked the petitioner about the proposed facility, they responded that their realtor had identified lots of properties just none in Novato that meet their needs without significant work and that they had not given up on their Prop 39 request and would like to locate at Nova Education Center

In our initial review we assumed the charter school would operate with the minimum required space - or the equivalent of 8 classrooms at 960 square feet as no details were provided with the petition budget narrative. When asked during our meeting with the petitioner what size facility the charter is looking for they responded 12,760 square feet. The petitioner subsequently responded to the question of facility size in writing as being 8,500 to 10,000 ft².

The only specific facilities the charter identified (in written response) appear to be facilities that have been ruled out and both of which were significantly less square feet. The lack of congruence in the petitioners responses reduces confidence that the charter has a clear idea of what their facility needs are. We further note that any commercial property will require leasehold improvements to ready the property to serve as an elementary school and the budget has no allowance for such. The petitioner acknowledged that at least one of the properties they described as being within their budget for rent would need significant repairs.

Facilities	2023-24	2024-25	2025-26	2026-27	2027-28
Rent budget	132,000	165,000	226,243	292,553	331,885
# rooms needed	8	10	13	15	17
square foot at 960/ea	7,680	9,600	12,480	14,400	16,320
Rate per square foot	17	18	18	19	20
Estimated cost	133,632	172,051	230,377	273,794	319,608
low est Difference to budget	1,632	7,051	4,134	(18,759)	(12,277)
Avg rate sq/ft	28	29	29	30	31
Estimated cost	212,736	273,898	366,749	435,867	508,802
avg est Difference to budget	80,736	108,898	140,506	143,314	176,917
rate sq/ft in petition	17.19	17.19	18.13	20.32	20.34
		-	0.05	0.12	0.00

review of rates on propertyshark.com 2/18/2023

	Annual sq ft rate
1510-1516 Grant Avenue, 19 spaces total 14,316 sq feet at 2.50/mo sq ft	30
Woodside Office Center, 7250 Redwood Blvd 2.25/mo sq ft	27
Rowland Plaza 2.85-3.10/sf/mo	34.2
Pell Plaza, 504 Redwood Blvd, Ignacio	30.6
Digital Plaza, 16 Digital Drive, Hamilton (16,804 sq ft available)	17.4
384 Bel Marin Keys Blvd, Hamilton	27
Average	27.7

Petitioner identified possible facilities in their response to our questions:

1787 grant avenue acknowledged repairs necessary	24
3833 Redwood Highway, Building One - no indication of building conditio	14.4

Based on the petitioner's response, our analysis stands as lower rent facilities require repairs

Charter Facility Grant Program

	2023-24	2024-25	2025-26	2026-27	2027-28
SB740 revenue	99,000	123,750	169,682	219,415	248,914
Rents/Lease expense	132,000	165,000	226,243	292,553	331,885
	75%	75%	75%	75%	75%
Amount per ADA	1,298.00	1,336.94	1,377.05	1,418.36	1,460.91
ADA	90.25	130.15	171.95	213.75	231.8
Total based on ADA	117,145	174,003	236,783	303,174	338,639
Lesser of 75% or ADA	99,000	123,750	169,682	219,415	248,914
Net cost to budget	33,000	41,250	56,561	73,138	82,971
Recalculate 75% with our estimate of cost					
Cost	133,632	172,051	230,377	273,794	319,608
Max reimburse 75%	100,224	129,038	172,782	205,345	239,706
Lesser of 75% or ADA	100,224	129,038	172,782	205,345	239,706
Adjusted net cost	33,408	43,013	57,594	68,448	79,902
Impact to budget	408	1,763	1,033	(4,690)	(3,069)

CONCLUDE petition budget for rent is only reasonable at the least expensive facilities found - which likely come with the need for repairs - which are not included in the budget. If we take average private rent rates, facility costs are understated

Special Education

		2023-24	2024-25	2025-26	2026-27	2027-28
	special education teacher fte	0	0.6	1	1	1
	teacher salary		37,585	64,789	67,311	69,837
	counselor (assume 25% devoted to S)	7,500	7,800	20,280	21,091	21,935
	benefits	1,650	9,985	18,715	19,449	20,190
	special education services	103,750	109,450	107,380	159,463	203,242
	total budgeted expense	112,900	127,235	146,375	200,003	245,366
p84	total student enrollment	95	137	181	225	244
	Special Education incidence 12%	11	16	22	27	29
	15%	14	21	27	34	37
FTE needed at 15% incidence						
RSP Teacher	1:28	0.51	0.73	0.97	1.21	1.31
Speech & Language	1:55 for 50%	0.13	0.19	0.25	0.31	0.33
Occupational Therapy	1:55 for 50%	0.13	0.19	0.25	0.31	0.33
Counseling	1:50 for 25%	0.07	0.10	0.14	0.17	0.18
Other services		0.10	0.10	0.10	0.10	0.10
		0.94	1.31	1.70	2.09	2.26
Contracted services salary & benefits per FTE		122,000	125,660	129,430	133,313	137,312
Estimated costs of service		114,591	164,654	219,905	278,323	309,721
Est unbudgeted costs		1,691	37,419	73,530	78,320	64,354
FTE needed at 12% incidence						
RSP Teacher	1:28	0.41	0.59	0.78	0.96	1.05
Speech & Language	1:55 for 50%	0.10	0.15	0.20	0.25	0.27
Occupational Therapy	1:55 for 50%	0.10	0.15	0.20	0.25	0.27
Counseling	1:50 for 25%	0.06	0.08	0.11	0.14	0.15
Other services		0.10	0.10	0.10	0.10	0.10
		0.77	1.07	1.38	1.69	1.82
Contracted services minimum \$100k/yr salary						
Estimated costs of service		94,113	134,237	178,513	225,324	250,523
Estimated unbudgeted costs		(18,787)	7,002	32,137	25,322	5,156

The Charter School shall be solely responsible for selecting, contracting with, and overseeing all non-public schools and non-public agencies used to serve special education students. In some circumstances, the Parties acknowledge that the District may be required to pay for or provide Healy School students with placements at locations other than at the Charter School's school site in order to provide them with a free appropriate public education. Such placements could include, without limitation, programs or services in other District schools, in other public districts within the SELPA, in a County Office of Education program, in a non-public school, at home, at a hospital, or in a residential program. When such programs or services are provided at District expense, the District shall be entitled to receive from the Charter School the pro rata share of all funding received for such student, including, without limitation, all ADA funds, based on the number of instructional days or minutes per day that the student is not at the Healy School site.

The Healy School will be responsible for all costs associated with educating students enrolled at the Healy School - regardless of final placement. The school will also retain the ADA and any associated ADA driven funding.

The District would not be responsible for placing students in specialized programs nor the cost associated with such placements

Expanded Learning Opportunity Program

p62 Healy School will offer an After School Education and Safety Program ("ASES") on campus with after-school tutoring, and partner with a local organization such as Marin YMCA in San Rafael to offer after-school education that meets students' needs, while simultaneously fulfilling these requirements. ASES is open to all students from TK-5, which are interested in the extended learning program.

p63 Intersession programming (Summer Break) will provide an array of options, but may include subjects such as: English Language Development, Maker's Camp, Theatre / Acting, and Creative Arts. Healy School can provide the District and/or County with a full schedule upon request. Our aim is to expand learning opportunities for all students at Healy School, and be a welcoming place for them to flourish.

	2023-24	2024-25	2025-26	2026-27	2027-28
state revenue		70,925	102,184	135,174	167,794
Expenses					
After School Salaries	32,400	44,616	73,155	104,746	123,587
benefits @ 22%	7,128	9,816	16,094	23,044	27,189
Before and After School Supplies	2,375	7,725	10,206	12,687	13,758
after school services		5,000	10,000	12,804	14,302
Total expenses	41,903	67,157	109,455	153,281	178,836
Excess of revenue over expenses	(41,903)	3,768	(7,271)	(18,107)	(11,042)
ELOP revenue		70,925	102,184	135,174	167,794
ELOP per ADA		-	-	-	-
ADA	95	137	181	225	244
UPP at 40%	38	55	72	90	98
P1 2022-23 exhibit per UPP ADA	2,054.20	2,115.83	2,179.30	2,244.68	2,312.02
Estimated revenue		80,401	119,426	162,515	208,082
Difference to petition	-	9,476	17,242	27,341	40,288

We recalculated ELOP revenue using 40% UPP instead of 63% as presented in the petition, but using currently certified rates from P1 22-23 and assuming an annual COLA of 3%
We concur ELOP revenue as stated is reasonable based on projected ADA

TK/K enrolled	44	62	84	84	84
TK/K unduplicated	28	40	53	53	53
Student enrollment gr 1-5	51	75	97	141	160
Number unduplicated gr 1-5	33	48	62	89	101
Staff needed at 1:10 TK/K	3	4	6	6	6
staff needed at 1:20 1-5	2	3	4	5	6
total staff needed	5	7	10	11	12
180 days after school 3 hours	54,000	75,600	108,000	118,800	129,600
30 days summer 9 hours	27,000	37,800	54,000	59,400	64,800
benefits	17,820	24,948	35,640	39,204	42,768
total estimated salary costs	98,820	138,348	197,640	217,404	237,168
salary budget likely understated	59,292	83,916	108,391	89,614	86,392

Expanded Learning Opportunities Program Plan Guide Transitional Kindergarten and Kindergarten
Programs serving transitional kindergarten or kindergarten pupils shall maintain a pupil[1]to-staff member ratio of no more than 10 to 1. (EC Section 46120[b][2][D]).

Estimated staff hours	4050	5670	8100	8910	9720
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SUMMARY

revenue likely understated	-	9,476	17,242	27,341	40,288
salary budget likely understated	59,292	83,916	108,391	89,614	86,392
net understatement of cost	59,292	74,440	91,149	62,273	46,104

In our initial analysis we identified ELOP revenue as likely being overstated. The petitioner's reminded us there is a minimum grant amount for this program. We re-analyzed the revenue using data from the recently certified P1 certification for current funding rates, and concur the Charter's estimate of revenue is conservative given the estimated ADA and Unduplicated Pupil Count

Curriculum

Grade	Name	Cost/student	
TK	Preschool Learning Foundations (this is a collection of knowledge and skills by age band)	No cost, but there is no curriculum here – these are skills and developmental milestones	
	Tools of the Mind (language, social emotional ELD, and Math) Cost: \$3750/classroom - access to eTools for 1 year \$749/classroom (unclear if this is annual access)	Tools of the Mind: \$3750/classroom - Core Year 1 and Assistance for PreK (am assuming they would use this for the TK) Full curriculum and tool 30 hours of PD School-year long subscription to eTools (portal) Technical Assistance sessions Curriculum/materials - need to purchase a 1-time Tools of the Mind Kit @ \$749.00/classroom. ? - is the 30 hours factored into the PD plan? ? - are the cost of iPads factored into budget ? - cost of wifi and maintenance for devices	
K	Tools of the Mind Cost: \$3750/classroom - access to eTools for 1 year One Time purchase: \$599/classroom/kit/subject - Literacy and Math available (so \$1,100 if purchasing 1 set each of literacy and math) California Wonders - Grade K	Tools of the Mind: \$3750/classroom - Core Year 1 and Assistance for PreK (am assuming they would use this for the TK) Full curriculum and tool 30 hours of PD School-year long subscription to eTools (portal) Technical Assistance sessions Curriculum/materials - need to purchase a 1-time Tools of the Mind Kit @ \$749.00/classroom. \$153.40/student	
Elementary	California Wonders - ELA - Gr 1 and 2-5 with 7 year subscription (unable to find a per/year price) Envision Math National Geographic Ladders program	\$274.76/student - Grade 1 \$141.56/student - Grade 2 - 5 \$667.50 /teachers guide - will need for each grade purchased \$138.00/student all grades (6 year license - digital and print) \$19.88/book/student - Amazon cost for book only. Unable to get quote for the cost that would include a digital subscription/license for online features. \$429.50 - Teachers edition per grade \$35/year/student - all grades Please note - these costs are the base level material and do not include ANY supplementary at all.	
ELD	California Wonders ELD Curriculum 6 year bundle per student	K - \$63.24 1- \$63.64 2 - \$93.12 3 - \$81.76 4 - \$79.12 5 - \$75.16	63.24 63.64 93.12 81.76 79.12 75.16
	Resilience Curriculum	What will be used? What cost?	

Professional Development

Identified area of need:	Estimated day(s)/ time	Detail	Cost - Estimate	El Dorado County SELPA
Tech Training	2	Aeries trainer assume all staff estimated by grade (nmitchell)		A wide range of training options across the bay area and state as well as zoom options - too many to ballpark
		Won't they also need SEIS training?	\$6,000.00	
		Certified Chromebook trainer	No cost - free resource	
Health and Safety	1	Assume District or MCOE? All staff	staff cost/time	
Special Education	1	Credentialed Expert/hourly rate Assume educators and admin Assume El Dorado County SELPA - *all training seems to require some level of travel - which will be necessary if the online modules do not cover all needed areas. Online learning as well	staff cost/time*	
		SELPA assume educators and admin	staff cost/time	
Mandate Reporting	0.5	Free state training all staff	staff cost/time	
ELD	2	Professional Expert assume admin, educators and paras + admin	\$5,000	
Culture/DEI	2	Professional Expert Dora Dome @ \$7000 Lori Watson @ \$7000 Zaretta Hammond @ \$7000	\$7,000	
Conflict Resolution	1	Online course Advancement Courses - PBIS @ \$450/ per person	\$450	
Healy Learning	1	Staff	staff cost/time	CPI - CSU East Bay, 1000 Broadway, Oakland
Project Based Learning	3	PBL @ \$700/person (year 1 4 educators + 2 paras)	\$4,200.00	
McKinney Vento	0.5	MCOE staff	staff cost/time	
LGBTQ+	0.5	Spahr center	\$1,350.00	
Social Emotional	0.5	Assume Healy Charter	staff cost/time	
Childhood Resilience	1.5	Experts from UCSF, Stanford, Harvard assumed cost/organization @ \$5000/expert/contract	\$10,000.00	
Suicide Awareness Training	0.6	MCOE staff	staff cost/time	
Human Resources compliance	1	ACSA or other resource assume admin, office manager, office assistant @ \$400/erson	\$1,200.00	
MCOE policies	0.3	Immigration?	No cost - free resource	
			\$29,200	

Anticipated Professional Development /time/days	Budget	\$	7,500
Paras 16.6	Budget understatement	\$	21,700
Educators (assumes counselor) 16.6			
Admin 17.5			
Office Staff 7.4			

Appendix B-A:

Scenario A

STRUCTURAL BUDGET: Solvent Insolvent

Petition budget and multi-year assessed for risks

The budget and multi-year projection presented with the petition reflected a budget surplus in all years such that ending balance reserves are projected to be almost 54% by the end of the fifth year of operations.

The budget was based on 95 students growing to 244 students by year 5 generating average daily attendance (ADA) at a rate of 95% for 90 ADA in year one. Budgeted revenues were based on a projected student demographic of 63% low income, 16% English Learner for an unduplicated count of 63%.

The instructional staffing pattern provides one teacher for each class of 20-26 students with a paraprofessional assigned to all TK and K classrooms. Instructional staff are increased appropriately with projected student enrollment.

Books, supplies, and materials are increased with projected student enrollment and incorporate the start up budget for computer devices and fixtures, furnitures and equipment. The services and other operating expenses budget is likewise increased in step with projected enrollment increases.

Budget Risks to Revenues

- We recalculated LCFF revenue using an unduplicated pupil percentage of 40%; no school in Novato holds as high an unduplicated % as 63%; while NUSD district-wide rate is 36% for elementary schools in 2022-23 and the target area school (Hamilton) is 58%, Healy proposes a lower EL% of 16% when compared to Hamilton's 43% EL demographic.
- Updated COLA to the Governor's budget proposal estimates for 2023-24 and beyond. We conclude that with no changes to projected enrollment and ADA, LCFF revenue could be reduced between 1% and 2% in each year projected.
- The enrollment projections do not appear to be supported by meaningful interest from the community. The LCFF revenues included in the budget projection would be reduced by approximately \$12,000 per ADA should actual enrollment fall short.
- If the student population is less than 55% low-income and or the school is unable to locate in the Hamilton neighborhood (the only NUSD elementary school with low-income population of 55% or higher), the school will not be eligible for SB740 charter facility grant revenue which would reduce revenues by \$99,000 in the first year.
- In our analysis of the nutrition program we determined both revenue and expenses had been understated with a resulting net increase to costs of approximately \$16,000 in the first year.

CONCLUSION: Budget Risks to revenues total \$76,312 in year one, which would almost fully consume the projected budget surplus of \$100,094. This does not take into account any loss of revenue associated with a lower student enrollment than projected.

Budget Risks to Expenses

- Start up costs for curriculum, computer devices, furniture and equipment appear understated in both the first year budget as well as the multi-year projection (the school proposes a continuous increase in both the number of classes as well as the grades served). In total we estimate these expenses are understated by almost \$70,000 in the first year.
- Professional development costs appear understated by almost \$22,000.
- Program costs to provide nutrition services as required under Universal Meals appear understated – however we also noted an understatement of projected revenues. We estimate net increase in costs of approximately \$16,000 in year one.
- Before and after school services to implement the Expanded Learning Opportunity Program appear understated by almost \$60,000 in the first year budget assuming all unduplicated pupils participate. While revenue also appears understated in the multi-year projection there remains an estimated net increase in costs in all years.
- The costs of providing special education services appears reasonable in the first year however does not appear to accommodate the growth in services that would be needed with the projected growth in population in the multi-year projection.
- Facility costs appear understated by approximately \$80,000 in the first year budget based on current rates and minimum facility requirements.
- We were unable to quantify the cost of the items omitted from the budget such as leasehold improvements, finance and administrative consultants, minimum required nursing services, provision for English learner instruction, mentors to support the teaching staff, educational consultants to help develop the rubrics to measure efficacy of the curriculum, marketing of the program, or translation services.

Other than the items noted, Scenario A stays consistent with the Healy School charter petition assumptions.

CONCLUSION: Quantified budget risks to expenses total \$280,409 in year one, more than double the projected budget surplus of \$100,094. In addition, the petition budget omits the costs for an array of functions and services that will be necessary to implement the program as presented in the petition.

OVERALL CONCLUSION: This scenario isolates all other risks from the risks to a lower enrollment than projected. If the risks quantified above are realized, the first year budget would reflect \$267,000 more in expenses than revenue and all years projected would likewise reflect expenses in excess of available revenues. Any loss of enrollment will likely exacerbate this imbalance.

The petitioner responded to our question regarding what allowance they have made for contingencies that expenses will be reduced to accommodate any loss of projected revenue and that the projected surplus is more than adequate to protect against unanticipated changes. As noted above, without considering the risk of lower enrollment, the petition budget is at risk of being structurally insolvent for all years presented.

Healy Charter School - Petition Appeal
Budget Analysis - SCENARIO A

SCENARIO A - ADA as presented, UPP 40%, assume does NOT qualify for Charter Schools Facility Grant Program, other risks identified

Line	2023-24			2024-25			2025-26			2026-27			2027-28		
	HS Estimate	Scenario A	Difference	HS Estimate	Scenario A	Difference	HS Estimate	Scenario A	Difference	HS Estimate	Scenario A	Difference	HS Estimate	Scenario A	Difference
Line INCOME															
1 LCFF	1,132,926	1,124,309	(8,617)	1,726,006	1,712,103	(13,903)	2,301,199	2,273,113	(28,086)	2,868,636	2,865,848	(2,788)	3,167,272	3,195,338	28,066
2 Federal	86,928	86,928	-	137,234	137,234	-	182,745	182,745	-	231,793	231,793	-	263,781	263,781	-
3 State	133,813	34,813	(99,000)	246,694	122,944	(123,750)	340,909	171,227	(169,682)	440,699	221,284	(219,415)	510,760	261,846	(248,914)
3a Nutrition program		31,305	31,305		55,144	55,144		59,643	59,643		74,142	74,142		80,403	80,403
4 Local	64,529	64,529	-	93,057	93,057	-	122,944	122,944	-	152,831	152,831	-	165,737	165,737	-
Total income	1,418,196	1,341,884	(76,312)	2,202,991	2,120,482	(82,509)	2,947,797	2,809,672	(138,125)	3,693,959	3,545,898	(148,061)	4,107,550	3,967,105	(140,445)
EXPENSES															
5 Certificated salaries	271,000	271,000	-	453,220	453,220	-	775,845	775,845	-	943,691	943,691	-	1,050,900	1,050,900	-
6 Classified salaries	281,600	281,600	-	371,140	371,140	-	528,600	528,600	-	591,369	591,369	-	643,175	643,175	-
7 Benefits	120,667	120,667	-	183,943	183,943	-	292,870	292,870	-	342,209	342,209	-	376,564	376,564	-
8 Books Materials & Supplies	181,326	181,326	-	211,097	211,097	-	284,732	284,732	-	351,392	351,392	-	361,016	361,016	-
8a Curriculum		28,163	28,163		14,125	14,125		2,302	2,302		5,487	5,487		(14,704)	(14,704)
8b Furniture and Equipment		8,200	8,200		4,100	4,100		4,100	4,100		2,050	2,050		2,050	2,050
8c Computers		33,206	33,206		3,650	3,650		(12,169)	(12,169)		28,768	28,768		2,488	2,488
8d Nutrition program		47,422	47,422		76,263	76,263		111,741	111,741		153,317	153,317		182,756	182,756
9 Services & Other Op Exp	436,010	436,010	-	561,033	561,033	-	743,483	743,483	-	965,960	965,960	-	1,102,270	1,102,270	-
9a ELOP program costs (net)		59,292	59,292		74,440	74,440		91,149	91,149		62,273	62,273		46,104	46,104
9b Special Education		1,691	1,691		37,419	37,419		73,530	73,530		78,320	78,320		64,354	64,354
9c Professional Development		21,700	21,700		21,700	21,700		21,700	21,700		21,700	21,700		21,700	21,700
9d Facility lease		80,736	80,736		108,898	108,898		140,506	140,506		143,314	143,314		176,917	176,917
10 Debt Service	27,499	27,499	-	18,979	18,979	-	-	-	-	-	-	-	-	-	-
TOTAL Expense	1,318,102	1,598,511	280,409	1,799,412	2,140,007	340,595	2,625,530	3,058,389	432,859	3,194,621	3,689,850	495,229	3,533,925	4,015,590	481,665
Net Income	100,094	(256,628)	(356,722)	403,579	(19,524)	(423,103)	322,267	(248,717)	(570,984)	499,338	(143,952)	(643,290)	573,625	(48,485)	(622,110)
Beginning net assets	-	-	-	100,094	(256,628)	(356,722)	503,673	(276,152)	(779,825)	825,940	(524,869)	(1,350,809)	1,325,278	(668,821)	(1,994,099)
Ending net assets	100,094	(256,628)	(356,722)	503,673	(276,152)	(779,825)	825,940	(524,869)	(1,350,809)	1,325,278	(668,821)	(1,994,099)	1,898,903	(717,306)	(2,616,209)
As % of expense	8%	-16%		28%	-13%		31%	-17%		41%	-18%		54%	-18%	

**Healy Charter School - Petition Appeal
Budget Analysis - SCENARIO A**

Assumptions 2023-24			
	HS	MCOE	Difference
Enrollment	95	95	0
ADA	90.25	90.25	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$2.50/breakfast and \$5 lunch universal offer			
9a ELOP estimate 4,000 hrs staff @ \$20/hr to serve all low income			
9b Special Education estimated 0.94 FTE in total			
9c Professional Development \$29,200			
9d Facility lease 7,680 ft2 at \$27.70/yr			

Assumptions 2024-25			
	HS	MCOE	Difference
Enrollment	137	137	0
ADA	130.15	130.15	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$2.63/breakfast and \$5.25 lunch universal offer			
9a ELOP 5,670 hrs staff @ \$20/hr offset by revenue understatement			
9b Special Education estimated 1.31 FTE in total			
9c Professional Development \$29,200			
9d Facility lease 9,600 ft2 at \$28.53/yr			

Assumptions 2025-26			
	HS	MCOE	Difference
Enrollment	181	181	0
ADA	171.95	171.95	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$2.76/breakfast and \$5.51 lunch universal offer			
9a ELOP 8,100 hrs staff @ \$20/hr offset by revenue understatement			
9b Special Education estimated 1.70 FTE in total			
9c Professional Development \$29,200			
9d Facility lease 11,520 ft2 at \$29.39/yr			

Assumptions 2026-27			
	HS	MCOE	Difference
Enrollment	225	225	0
ADA	213.75	213.75	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$2.89/breakfast and \$5.79 lunch universal offer			
9a ELOP 8,910 hrs staff @ \$20/hr offset by revenue understatement			
9b Special Education estimated 2.09 FTE in total			
9c Professional Development \$29,200			
9d Facility lease 13,440 ft2 at \$30.27/yr			

Assumptions 2027-28			
	HS	MCOE	Difference
Enrollment	244	244	0
ADA	231.8	231.8	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$3.04/breakfast and \$6.08 lunch universal offer			
9a ELOP 9,720 hrs staff @ \$20/hr offset by revenue understatement			
9b Special Education estimated 2.26 FTE in total			
9c Professional Development \$29,200			
9d Facility lease 15,360 ft2 at \$31.18/yr			

Appendix B-B:

Scenario B

STRUCTURAL BUDGET: Solvent Insolvent

Alternative Elements for the Multi-Year Budget Projections:

Facilities

This scenario removes facilities as a risk factor and assumes enrollment projections are not at risk.

Revenues

- As in Scenario A, we recalculated LCFF revenue using an unduplicated pupil percentage of 40%; no school in Novato holds as high an unduplicated % as 63%; while NUSD district-wide rate is 36% for elementary schools in 2022-23 and the target area school (Hamilton) is 58%, Healy proposes a lower EL% of 16% when compared to Hamilton's 43% EL demographic.
- Updated COLA to the Governor's budget proposal estimates for 2023-24 and beyond but otherwise used projected enrollment and ADA as presented in the petition.
- In our analysis of the nutrition program we determined both revenue and expenses had been understated with a resulting net increase to costs of approximately \$16,000 in the first year.

Expenses

- Start up costs for curriculum, computer devices, furniture and equipment appear understated in both the first year budget as well as the multi-year projection (the school proposes a continuous increase in both the number of classes as well as the grades served). In total we estimate these expenses are understated by almost \$70,000 in the first year.
- Professional development costs appear understated by almost \$22,000.
- Program costs to provide nutrition services as required under Universal Meals appear understated – however we also noted an understatement of projected revenues. We estimate net increase in costs of approximately \$16,000 in year one.
- Before and after school services to implement the Expanded Learning Opportunity Program appear understated by almost \$60,000 in the first year budget assuming all unduplicated pupils participate. While revenue also appears understated in the multi-year projection there remains an estimated net increase in costs in all years.
- The costs of providing special education services appears reasonable in the first year however does not appear to accommodate the growth in services that would be needed with the projected growth in population in the multi-year projection.
- We were unable to quantify the cost of the items omitted from the budget such as leasehold improvements, finance and administrative consultants, minimum required nursing services, provision for English learner instruction, mentors to support the teaching staff, educational consultants to help develop the rubrics to measure efficacy of the curriculum, marketing of the program, or translation services.

Other than the items noted, Scenario A stays consistent with the Healy School charter petition assumptions.

CONCLUSION: This scenario removes facilities as a risk factor, and assumes enrollment projections and associated attendance is reasonable. Once these risks are removed the proposed charter becomes solvent in the second year of operation.

Healy Charter School - Petition Appeal
Budget Analysis - SCENARIO B

SCENARIO B - ADA as presented, UPP 40%, Qualifies for Charter Schools Facility Grant Program, other risks identified

Line	INCOME	2023-24			2024-25			2025-26			2026-27			2027-28		
		HS Estimate	Scenario B	Difference	HS Estimate	Scenario B	Difference	HS Estimate	Scenario B	Difference	HS Estimate	Scenario B	Difference	HS Estimate	Scenario B	Difference
1	LCFF	1,132,926	1,124,309	(8,617)	1,726,006	1,712,103	(13,903)	2,301,199	2,273,113	(28,086)	2,868,636	2,865,848	(2,788)	3,167,272	3,195,338	28,066
2	Federal	86,928	86,928	-	137,234	137,234	-	182,745	182,745	-	231,793	231,793	-	263,781	263,781	-
3	State	133,813	133,813	-	246,694	246,694	-	340,909	340,909	-	440,699	440,699	-	510,760	510,760	-
3a	Nutrition program		31,305	31,305		55,144	55,144		59,643	59,643		74,142	74,142		80,403	80,403
4	Local	64,529	64,529	-	93,057	93,057	-	122,944	122,944	-	152,831	152,831	-	165,737	165,737	-
Total income		1,418,196	1,440,884	22,688	2,202,991	2,244,232	41,241	2,947,797	2,979,354	31,557	3,693,959	3,765,313	71,354	4,107,550	4,216,019	108,469
EXPENSES																
5	Certificated salaries	271,000	271,000	-	453,220	453,220	-	775,845	775,845	-	943,691	943,691	-	1,050,900	1,050,900	-
6	Classified salaries	281,600	281,600	-	371,140	371,140	-	528,600	528,600	-	591,369	591,369	-	643,175	643,175	-
7	Benefits	120,667	120,667	-	183,943	183,943	-	292,870	292,870	-	342,209	342,209	-	376,564	376,564	-
8	Books Materials & Supplies	181,326	181,326	-	211,097	211,097	-	284,732	284,732	-	351,392	351,392	-	361,016	361,016	-
8a	Curriculum		28,163	28,163		14,125	14,125		2,302	2,302		5,487	5,487		(14,704)	(14,704)
8b	Furniture and Equipment		8,200	8,200		4,100	4,100		4,100	4,100		2,050	2,050		2,050	2,050
8c	Computers		33,206	33,206		3,650	3,650		(12,169)	(12,169)		28,768	28,768		2,488	2,488
8d	Nutrition program		47,422	47,422		76,263	76,263		111,741	111,741		153,317	153,317		182,756	182,756
9	Services & Other Op Exp	436,010	436,010	-	561,033	561,033	-	743,483	743,483	-	965,960	965,960	-	1,102,270	1,102,270	-
9a	ELOP program costs		59,292	59,292		74,440	74,440		91,149	91,149		62,273	62,273		46,104	46,104
9b	Special Education		1,691	1,691		37,419	37,419		73,530	73,530		78,320	78,320		64,354	64,354
9c	Professional Development		21,700	21,700		21,700	21,700		21,700	21,700		21,700	21,700		21,700	21,700
10	Debt Service	27,499	27,499	-	18,979	18,979	-	-	-	-	-	-	-	-	-	-
TOTAL Expense		1,318,102	1,517,775	199,673	1,799,412	2,031,109	231,697	2,625,530	2,917,883	292,353	3,194,621	3,546,536	351,915	3,533,925	3,838,673	304,748
Net Income		100,094	(76,892)	(176,986)	403,579	213,123	(190,456)	322,267	61,471	(260,796)	499,338	218,777	(280,561)	573,625	377,346	(196,279)
Beginning net assets		-	-	-	100,094	(76,892)	(176,986)	503,673	136,232	(367,441)	825,940	197,703	(628,237)	1,325,278	416,479	(908,799)
Ending net assets		100,094	(76,892)	(176,986)	503,673	136,232	(367,441)	825,940	197,703	(628,237)	1,325,278	416,479	(908,799)	1,898,903	793,826	(1,105,077)
As % of expense		8%	-5%		28%	7%		31%	7%		41%	12%		54%	21%	

Healy Charter School - Petition Appeal
Budget Analysis - SCENARIO B

Assumptions 2023-24			
	HS	MCOE	Difference
Enrollment	95	95	0
ADA	90.25	90.25	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$2.50/breakfast and \$5 lunch universal offer			
9a ELOP estimate 4,000 hrs staff @ \$20/hr to serve all low income			
9b Special Education estimated 0.94 FTE in total			
9c Professional Development \$29,200			

Assumptions 2024-25			
	HS	MCOE	Difference
Enrollment	137	137	0
ADA	130.15	130.15	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$2.63/breakfast and \$5.25 lunch universal offer			
9a ELOP 5,670 hrs staff @ \$20/hr offset by revenue understatement			
9b Special Education estimated 1.31 FTE in total			
9c Professional Development \$29,200			

Assumptions 2025-26			
	HS	MCOE	Difference
Enrollment	181	181	0
ADA	171.95	171.95	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$2.76/breakfast and \$5.51 lunch universal offer			
9a ELOP 8,100 hrs staff @ \$20/hr offset by revenue understatement			
9b Special Education estimated 1.70 FTE in total			
9c Professional Development \$29,200			

Assumptions 2026-27			
	HS	MCOE	Difference
Enrollment	225	225	0
ADA	213.75	213.75	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$2.89/breakfast and \$5.79 lunch universal offer			
9a ELOP 8,910 hrs staff @ \$20/hr offset by revenue understatement			
9b Special Education estimated 2.09 FTE in total			
9c Professional Development \$29,200			

Assumptions 2027-28			
	HS	MCOE	Difference
Enrollment	244	244	0
ADA	231.8	231.8	0
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated on 40% UPP & Gov Budget proposal for 2023-24			
3a Reimbursement at \$6.59/day per pupil			
Expense			
8a Curriculum costs increased per current rates			
8b Classroom furniture & whiteboard understated \$2,050/class			
8c I-pads for TK/K @ \$600; Chromebooks @ \$250; Staff @ \$1,500			
8d Estimate \$3.04/breakfast and \$6.08 lunch universal offer			
9a ELOP 9,720 hrs staff @ \$20/hr offset by revenue understatement			
9b Special Education estimated 2.26 FTE in total			
9c Professional Development \$29,200			

Appendix B-C:

Scenario C

STRUCTURAL BUDGET: Solvent Insolvent

Alternative Elements for the Multi-Year Budget Projections:

Enrollment and associated attendance

This scenario isolates the risk of lower enrollment from all other risks

Enrollment

The Healy School petition assumes an enrollment of 95 students in the first year enrolling students in grades TK through 2nd grade growing the school by enrolling 40 TK students annually and increasing K enrollment by 2 students per class. The petition budget assumes an unduplicated pupil percentage of 63% for the calculation of Local Control Funding Formula (LCFF) revenues.

- The enrollment projections do not appear to be supported by meaningful interest from the community as evidenced by the lack of any testimony, either in writing or in person, in support of the charter school at either the district's public hearing on the petition, or the public hearing held on the appeal. On the contrary, the community, particularly that of the Hamilton area the charter is targeting for recruitment efforts, voiced opposition.
- Scenario C assumes enrollment of 15 less students in the initial year, and that growth will happen more gradually with TK enrollment growing each year to 26 students in year 5 and an increase in K enrollment each year but otherwise maintaining cohort movement.
- As in Scenario A, we recalculated LCFF revenue using an unduplicated pupil percentage of 40%; no school in Novato holds as high an unduplicated % as 63%; while NUSD district-wide rate is 36% for elementary schools in 2022-23 and the target area school (Hamilton) is 58%, Healy proposes a lower EL% of 16% when compared to Hamilton's 43% EL demographic.

Revenue

- LCFF Revenue is based on 80 students enrolling in 2023-24 with a 95% attendance rate increasing enrollment each year to 166 students by Year 5 of the projection.
- LCFF Revenue is calculated with an unduplicated pupil percentage of 40%

Expenses

- Salaries for certificated and classified instructional staff and the associated benefits are reduced in line with the reduction in enrollment
- Books supplies and materials are reduced proportionate to the reduction in enrollment

Other than the items noted, Scenario B stays consistent with the Healy School charter petition assumptions noting that any further reductions to enrollment driven revenues would be accompanied by a reduction in the cost of services.

CONCLUSION:

In isolating enrollment risks from the risks to the budget identified in Scenario A, it is apparent that with a slightly lower enrollment than that projected, the charter would not be fully viable until year 4 or 5 of operations even if they are able to mitigate the other identified risks.

The combination of risks to the petition budget are significant and lead to a determination of fiscal insolvency, especially in the formative years.

Healy Charter School - Petition Appeal
Budget Analysis - SCENARIO C

SCENARIO C - ENROLLMENT reduced 15 in Y1; Unduplicated 40%; Qualifies for Charter Schools Facility Grant Program; All other risks mitigated
Expenses reduced with lower enrollment

Line	2023-24			2024-25			2025-26			2026-27			2027-28		
	HS Estimate	Scenario C	Difference	HS Estimate	Scenario C	Difference	HS Estimate	Scenario C	Difference	HS Estimate	Scenario C	Difference	HS Estimate	Scenario C	Difference
INCOME															
1 LCFF	1,132,926	943,745	(189,181)	1,726,006	1,272,698	(453,308)	2,301,199	1,602,309	(698,890)	2,868,636	1,973,574	(895,062)	3,167,272	2,103,811	(1,063,461)
2 Federal	86,928	86,928	-	137,234	137,234	-	182,745	182,745	-	231,793	231,793	-	263,781	263,781	-
3 State	133,813	133,813	-	246,694	246,694	-	340,909	340,909	-	440,699	440,699	-	510,760	510,760	-
4 Local	64,529	64,529	-	93,057	93,057	-	122,944	122,944	-	152,831	152,831	-	165,737	165,737	-
Total income	1,418,196	1,229,015	(189,181)	2,202,991	1,749,683	(453,308)	2,947,797	2,248,907	(698,890)	3,693,959	2,798,897	(895,062)	4,107,550	3,044,089	(1,063,461)
EXPENSES															
5 Certificated salaries	271,000	271,000	-	453,220	390,578	(62,642)	775,845	646,268	(129,577)	943,691	741,758	(201,933)	1,050,900	771,554	(279,346)
6 Classified salaries	281,600	281,600	-	371,140	339,929	(31,211)	528,600	463,192	(65,409)	591,369	523,344	(68,025)	643,175	607,802	(35,373)
7 Benefits	120,667	120,667	-	183,943	160,712	(23,231)	292,870	244,081	(48,789)	342,209	278,322	(63,887)	376,564	303,458	(73,106)
8 Books Materials & Supplies	181,326	152,696	(28,630)	211,097	163,331	(47,766)	284,732	207,650	(77,082)	351,392	249,879	(101,513)	361,016	245,609	(115,407)
9 Services & Other Op Exp	436,010	436,010	-	561,033	561,033	-	743,483	743,483	-	965,960	965,960	-	1,102,270	1,102,270	-
10 Debt Service	27,499	27,499	-	18,979	18,979	-	-	-	-	-	-	-	-	-	-
TOTAL Expense	1,318,102	1,289,472	(28,630)	1,799,412	1,634,561	(164,851)	2,625,530	2,304,673	(320,857)	3,194,621	2,759,263	(435,358)	3,533,925	3,030,694	(503,231)
Net Income	100,094	(60,457)	(160,551)	403,579	115,122	(288,457)	322,267	(55,766)	(378,033)	499,338	39,634	(459,704)	573,625	13,395	(560,230)
Beginning net assets	-	-	-	100,094	(60,457)	(160,551)	503,673	54,665	(449,008)	825,940	(1,101)	(827,041)	1,325,278	38,533	(1,286,745)
Ending net assets	100,094	(60,457)	(160,551)	503,673	54,665	(449,008)	825,940	(1,101)	(827,041)	1,325,278	38,533	(1,286,745)	1,898,903	51,928	(1,846,975)
As % of expense	8%	-5%		28%	3%		31%	0%		41%	1%		54%	2%	

Healy Charter School - Petition Appeal
Budget Analysis - SCENARIO C

Assumptions 2023-24			
	HS	MCOE	Difference
Enrollment	95	80	-15
ADA	90.25	76	-14.25
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
Expense			
5			
6			
7			
8	Books supplies and materials reduced proportionate to enrollment		

Assumptions 2024-25			
	HS	MCOE	Difference
Enrollment	137	106	-31
ADA	130.15	100.7	-29.45
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
Expense			
5	Certificated salaries reduced by 1 FTE		
6	Paraprofessionals reduced by 1 FTE		
7	Benefits reduced in line with salary reduction		
8	Books supplies and materials reduced proportionate to enrollment		

Assumptions 2025-26			
	HS	MCOE	Difference
Enrollment	181	132	-49
ADA	171.95	125.4	-46.55
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
Expense			
5	Certificated salaries reduced by 2 FTE		
6	Paraprofessionals reduced by 2 FTE		
7	Benefits reduced in line with salary reduction		
8	Books supplies and materials reduced proportionate to enrollment		

Assumptions 2026-27			
	HS	MCOE	Difference
Enrollment	225	160	-65
ADA	213.75	152	-61.75
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
5 Certificated salaries reduced by 3 FTE			
6 Paraprofessionals reduced by 2 FTE			
7 Benefits reduced in line with salary reduction			
8 Books supplies and materials reduced proportionate to enrollment			
Assumptions 2027-28			
	HS	MCOE	Difference
Enrollment	244	166	-78
ADA	231.8	157.7	-74.1
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
5 Certificated salaries reduced by 4 FTE			
6 Paraprofessionals reduced by 1 FTE			
7 Benefits reduced in line with salary reduction			
8 Books supplies and materials reduced proportionate to enrollment			

Appendix B-D:

Scenario D

STRUCTURAL BUDGET: Solvent Insolvent

Alternative Elements for the Multi-Year Budget Projections:

This scenario models the impact of a more significant reduction in opening enrollment, isolating enrollment risks from all other identified risks.

Enrollment

The Healy School petition assumes an enrollment of 95 students in the first year enrolling students in grades TK through 2nd grade growing the school by enrolling 40 TK students annually and increasing K enrollment by 2 students per class. The petition budget assumes an unduplicated pupil percentage of 63% for the calculation of Local Control Funding Formula (LCFF) revenues.

- Scenario D assumes enrollment of 29 less students in the initial year, and that growth will happen more gradually with TK enrollment growing each year to 22 students in year 5 and an increase in K enrollment each year but otherwise maintaining cohort movement.
- Scenario D also assumes the charter's enrollment will reflect a 40% unduplicated pupil count (slightly higher than district-wide elementary school rate of 36%)

Revenue

- LCFF Revenue is based on 66 students enrolling in 2023-24 with a 95% attendance rate increasing enrollment each year to 147 students by Year 5 of the projection.
- As in Scenario A, we recalculated LCFF revenue using an unduplicated pupil percentage of 40%; no school in Novato holds as high an unduplicated % as 63%; while NUSD district-wide rate is 36% for elementary schools in 2022-23 and the target area school (Hamilton) is 58%, Healy proposes a lower EL% of 16% when compared to Hamilton's 43% EL demographic.

Expenses

- Salaries for certificated and classified instructional staff and the associated benefits are reduced in line with the reduction in enrollment
- Books supplies and materials is reduced proportionate to the reduction in enrollment

Other than the items noted, Scenario D stays consistent with the Healy School charter petition assumptions noting that any further reductions to enrollment driven revenues would be accompanied by a reduction in the cost of services.

CONCLUSION:

In isolating enrollment risks from the risks to the budget identified in Scenario A, it is apparent that with a more significant reduction in opening enrollment than that projected, the charter would struggle to be viable even if they are able to mitigate the other identified risks.

The combination of risks to the petition budget are significant and all lead to a determination of fiscal insolvency, especially in the formative years. The lack of a fiscal director or any proven fiscal management experience on the board of directors or listed as a prerequisite for the only administrator in the early years of the school heightens the risks the charter would face insolvency in its first year.

Healy Charter School - Petition Appeal
Budget Analysis - SCENARIO D

SCENARIO D - ENROLLMENT reduced 29 in Y1; Unduplicated 40%; Qualifies for Charter Schools Facility Grant Program; All other risks mitigated
Expenses reduced with lower enrollment

Line	2023-24			2024-25			2025-26			2026-27			2027-28		
	HS Estimate	Scenario D	Difference	HS Estimate	Scenario D	Difference	HS Estimate	Scenario D	Difference	HS Estimate	Scenario D	Difference	HS Estimate	Scenario D	Difference
INCOME															
1 LCFF	1,132,926	786,574	(346,352)	1,726,006	1,056,156	(669,850)	2,301,199	1,356,656	(944,543)	2,868,636	1,697,367	(1,171,269)	3,167,272	1,866,615	(1,300,657)
2 Federal	86,928	86,928	-	137,234	137,234	-	182,745	182,745	-	231,793	231,793	-	263,781	263,781	-
3 State	133,813	133,813	-	246,694	246,694	-	340,909	340,909	-	440,699	440,699	-	510,760	510,760	-
4 Local	64,529	64,529	-	93,057	93,057	-	122,944	122,944	-	152,831	152,831	-	165,737	165,737	-
Total income	1,418,196	1,071,844	(346,352)	2,202,991	1,533,141	(669,850)	2,947,797	2,003,254	(944,543)	3,693,959	2,522,690	(1,171,269)	4,107,550	2,806,893	(1,300,657)
EXPENSES															
5 Certificated salaries	271,000	212,000	(59,000)	453,220	327,935	(125,285)	775,845	581,479	(194,366)	943,691	674,447	(269,244)	1,050,900	701,718	(349,183)
6 Classified salaries	281,600	251,200	(30,400)	371,140	339,929	(31,211)	528,600	463,192	(65,409)	591,369	523,344	(68,025)	643,175	607,802	(35,373)
7 Benefits	120,667	101,904	(18,763)	183,943	146,930	(37,013)	292,870	229,828	(63,042)	342,209	263,514	(78,695)	376,564	288,094	(88,470)
8 Books Materials & Supplies	181,326	125,974	(55,352)	211,097	134,054	(77,043)	284,732	174,615	(110,117)	351,392	213,959	(137,433)	361,016	217,497	(143,519)
9 Services & Other Op Exp	436,010	436,010	-	561,033	561,033	-	743,483	743,483	-	965,960	965,960	-	1,102,270	1,102,270	-
10 Debt Service	27,499	27,499	-	18,979	18,979	-	-	-	-	-	-	-	-	-	-
TOTAL Expense	1,318,102	1,154,587	(163,515)	1,799,412	1,528,861	(270,551)	2,625,530	2,192,596	(432,934)	3,194,621	2,641,223	(553,398)	3,533,925	2,917,381	(616,544)
Net Income	100,094	(82,743)	(182,837)	403,579	4,280	(399,299)	322,267	(189,342)	(511,609)	499,338	(118,533)	(617,871)	573,625	(110,488)	(684,113)
Beginning net assets	-	-	-	100,094	(82,743)	(182,837)	503,673	(78,463)	(582,136)	825,940	(267,805)	(1,093,745)	1,325,278	(386,338)	(1,711,616)
Ending net assets	100,094	(82,743)	(182,837)	503,673	(78,463)	(582,136)	825,940	(267,805)	(1,093,745)	1,325,278	(386,338)	(1,711,616)	1,898,903	(496,826)	(2,395,729)
As % of expense	8%	-7%		28%	-5%		31%	-12%		41%	-15%		54%	-17%	

Healy Charter School - Petition Appeal
Budget Analysis - SCENARIO D

Assumptions 2023-24			
	HS	MCOE	Difference
Enrollment	95	66	-29
ADA	90.25	62.7	-27.55
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
Expense			
5 Certificated salaries reduced by 1 FTE			
6 Paraprofessionals reduced by 1 FTE			
7 Benefits reduced in line with salary reduction			
8 Books supplies and materials reduced proportionate to enrollment			

Assumptions 2024-25			
	HS	MCOE	Difference
Enrollment	137	87	-50
ADA	130.15	82.65	-47.5
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
Expense			
5 Certificated salaries reduced by 2 FTE			
6 Paraprofessionals reduced by 1 FTE			
7 Benefits reduced in line with salary reduction			
8 Books supplies and materials reduced proportionate to enrollment			

Assumptions 2025-26			
	HS	MCOE	Difference
Enrollment	181	111	-70
ADA	171.95	105.45	-66.5
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
Expense			
5 Certificated salaries reduced by 3 FTE			
6 Paraprofessionals reduced by 2 FTE			
7 Benefits reduced in line with salary reduction			
8 Books supplies and materials reduced proportionate to enrollment			

Assumptions 2026-27			
	HS	MCOE	Difference
Enrollment	225	137	-88
ADA	213.75	130.15	-83.6
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
5 Certificated salaries reduced by 4 FTE			
6 Paraprofessionals reduced by 2 FTE			
7 Benefits reduced in line with salary reduction			
8 Books supplies and materials reduced proportionate to enrollment			

Assumptions 2027-28			
	HS	MCOE	Difference
Enrollment	244	147	-97
ADA	231.8	139.65	-92.15
Unduplicated %	63%	40%	-23%
Line			
Revenue			
1 LCFF calculated Gov Budget proposal factors for 2023-24			
3 Does not qualify for Charter facility grant program			
3a Reimbursement at \$6.59/day per pupil			
Expense			
5 Certificated salaries reduced by 5 FTE			
6 Paraprofessionals reduced by 1 FTE			
7 Benefits reduced in line with salary reduction			
8 Books supplies and materials reduced proportionate to enrollment			

Appendix C:

Staff Review Questions to Petitioner

MCOE Staff Review Matrix Questions
February 15, 2023

Section A: Description of Vision, Mission, and Educational Program	
2a	P. 4 of the response to the district findings, noted there would be 10 days of professional development at the start of the year (5 days extra duty + 5 days wrapped into teachers exempt annual salaries). Is this in addition to the 180 student instructional days? Please clarify.
2b	Please clarify the specific expectations and requirements for regular attendance, tardies, and independent study. How will the charter monitor and track attendance? Please describe your process for collecting meaningful enrollment.
4a	How do you envision resilience studies being incorporated into core subjects across various grade bands? Please provide additional information regarding how skills will be measured.
4c	P. 96, action 1 includes notation of a performance-based learning program to demonstrate proficiency on outcomes. Can you share more about this? How will integrated support be provided to EL students in each classroom?
5a	What process will be used to identify the effectiveness of curriculum and materials or any other student needs?

Section B: Measurable Student Outcomes	
1	Measurable outcomes for individual/all (EL, SWD, SED, Foster/Homeless) subgroups are not specifically identified. Please provide. What assessments will be used to measure outcomes for student groups and what tools or methods will be used? How will this information correlate to grade level expectancies?
2	<p>Can you provide more clarity around the specific actions and how they are related to the stated annual goals?</p> <p>pg 96 Action 1 references “performance- based learning program” , this is the first mention of this. On p.54-56 petition provides overview of instructional approach including “ teacher-centered instruction, project based learning, and experiential learning”</p> <p>Priority 3- Measurable outcome does not include a % or # to be measurable- How will you establish your baseline and growth objectives?</p> <p>Priority 4- Action 1- Please elaborate on how a testing schedule will help students demonstrate achievement.</p> <p>Action 2- states ELD to be provided during advisory- this would mean that EL students do not receive advisory. Please clarify</p>

3	Please provide additional information/clarity
4	Please provide additional information/clarity
6	Please provide additional information/clarity
7	How will benchmark and specific classroom-level skills be developed?
8	How will you define “low suspension and expulsion rates”. How will the charter monitor the status of students? How will they move from grade to grade? How will the specific action as listed in the LCAP plan provide the school with what is needed for greater understanding of student outcomes?

Section C: Student Progress Measurement	
5	The report cards will utilize a 4 point rating scale. What is this based on? The petition also mentions A-G requirements. How is this relevant for a TK-5 school?

Section D: Governance Structure	
3b	Please provide additional information/clarity
5	Please describe internal controls designed to prevent fraud, embezzlement, and conflicts of interest.

Section E: Employee Qualifications	
2	<p>Please clarify the counseling services that will be provided and whether this includes provision of Educationally Relevant Mental Health Services (ERMHS) should this service be identified in any student Individual Education Programs (IEPs)?</p> <p>The petition identifies additional instructional assistance to serve the needs of English Learners, however we are unable to find any positions, either in salaries or contracted services. Please clarify.</p> <p>We note the Finance Manager does not begin until Year 3 of the proposed operations. Please clarify who will perform the Finance Manager’s role for the first two years?</p>
3	Please refer to questions related to who will monitor and administer

	requirements under the health and safety practices element.
4	<p>Please share specific recruitment strategies the Charter will utilize to attract a diverse applicant pool.</p> <p>What are the Charter's recruitment strategies to attract and recruit staff with a salary and benefit structure that is less attractive than similarly situated schools in Marin County (especially in light of the other Charters participating in Retirement Systems)?</p>
6	Will there be any non-core teaching positions? How does the Charter anticipate supporting instruction in areas of art, music, and library services?
7	Please provide clarification on the proposed staffing and teacher-to-student ratio for TK?

Section F: Health and Safety Procedures

1	What is the timeline for completion of the actual plan, inclusive of training implementation?
5	<p>Can the petitioner provide any detail on plans for any of these policies/practices, including who will monitor and administer requirements of the referenced codes especially in the first two years of operation? What is the projected cost? The projected costs appear to be included in the budget beginning in 2025-26 or the third year of operations under contracted services. Please describe how ongoing administration and monitoring of Health and Safety policies and procedures will be performed for the first two years of proposed operations.</p>

Section G: Racial and Ethnic Balance

1	<p>How do you define your diverse population? Please share specific strategies that you intend to use to reach a diverse student population</p> <p>The petition states the Charter expects 63% of the student population will qualify for free and reduced price meals and that 16% of the student body will be English Learners. NUSD demographics indicate that a higher percentage of English Learners results in a higher percentage of low-income students. Please provide more detail on the expected demographics of Healy School.</p>
2	The petition notes that the Charter will strive to achieve racial and ethnic balance. Please describe the practices and policies that will accomplish this?
4	Please provide examples of supports and how they may help to maintain

	enrollment balance?
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Section H: Admissions Policies and Procedures	
3	Please clarify how the community will be informed and given an equal opportunity to attend the charter school.
4 General (misnumbered)	The petition identifies that the lottery will be conducted in the spring and that all rules, deadlines, and times of the public random drawing will be communicated in the application process. Can you provide any further clarity on the timeline for specific steps in the lottery process?
5	The petition states that the Charter School will hold a public random drawing (i.e., a lottery) to determine admission for the impacted grade level, with the exception of existing students in good standing, who are guaranteed admission in the following school year. However does not state what it means to be a student “in good standing” (p. 137). What does “in good standing” mean?
6	Can you say more about the preferences and how they are not likely to impact the racial, ethnic, and unduplicated pupil balance?

Section I: Annual Financial Audits	
	No Questions

Section J: Suspension and Expulsion Procedures	
General	Expulsion procedures include a hearing before an Administrative Panel consisting of at least (3) members who are certificated and neither a teacher of the student nor a Board member (p.159). How will the Charter adhere to this policy if there are not enough certificated staff to fulfill this procedure?

Section K: Staff Retirement System	
	No Questions

Section L: Public School Attendance Alternatives	
	No Questions

Section M: Post-employment Rights of Employees	
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1b (corrected)	Will the charter transfer sick leave of an employee leaving the Charter?
1c (corrected)	How is the Charter addressing service credit/ tenure?

Section N: Dispute Resolution Procedures	
2	The petition references policies to address complaints. Have these policies been developed?

Section O: Closure Procedures	
1a	The petition does not identify the responsible entity or person that will conduct closure- related activities and instead states that in the event of school closure the board of directors will identify a person or persons responsible for closure related activities. Please identify the specific entity or individual responsible for closure related activities.
1b	Please provide information as to how the Charter will communicate to all interested parties will occur promptly in the event of closure?
2	The manner in which parents and guardians may obtain copies of pupil records if the charter school closes refers to the 'entity responsible for closure related activities'. Can you be more specific?
3b	Addresses disposition of residual assets by referring to the articles of incorporation which identify 'a non-profit'. Please provide the name of the non-profit.
3c	Identifies that residual assets will remain the property of the Healy School non-profit and will be disposed of and when the non-profit corporation is dissolved. Please provide the name of the non-profit.

Back Office Provider	
1	The petition states a provider will be used for finance operations - payroll, ap, accounting, budget and finance and that a finance officer will also be hired in year 3. Who fulfills the finance officer's role for the first two years? Will there be any change in the services provided with the hiring of the finance officer? The budget indicates the back-office services grow with inflation and enrollment.
2	The petition clearly indicates the Healy School will provide timely submissions of calendared items by their respective due dates, however does not identify which items the back office provider will be responsible for preparing. Please identify what reporting items the back office provider will provide.
3	Petition does not indicate the back office provider will provide timely submissions

	of requests for information. Please describe the role the school expects the back office provider to play.
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Charter Management Organization	
1	Identifies that the Healy School will provide its own administrative services through either its own staff or an appropriately qualified third-party contractor. We were unable to find costs for a contractor in the budget. Please can you clarify?

Community Impact	
2	No questions

Facilities	
1a	Please describe the size of facilities the Charter intends to secure
1b	A facility has not been secured, and a schedule for securing the facility is not identified, nor is the person responsible for securing the facility. Please describe the school's facility plans.
1c	Please describe how potential sites will be assessed for suitability?
2a	The petition does not identify any potential sites, their future availability or a timeline to secure and prepare for school opening. Please provide any contingency plans for securing alternate facilities if your request for Prop 39 is not granted.
2c	The budget for rent appears low given minimum space requirements for each classroom and Marin County facility lease rates. Please provide us details that support the assumptions for this budget line. In addition we note the school anticipates receiving SB740 funding to offset 75% of rent costs, however, eligibility for this funding is based on at least 55% of the student population qualifying as low-income. Please see additional questions for Element 7 regarding the anticipated demographics of the student population. Please provide your contingency plans if the Charter does not meet the 55% requirement for SB740 funding.
2d	We understand the Healy School made a timely request to the NUSD for facilities under Prop 39, however, the district made a timely request for additional supporting information relative to projected enrollment and absent such support

	<p>has denied the school's request for facilities. Please provide your response to the District.</p> <p>What is the anticipated plan for facilities if the enrollment is less than 80 ADA from Novato?</p>
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Financial and Administrative Plan	
1a	Charter assumes 95 students will enroll in year 1 with a 63% unduplicated count. What is the contingency for associated reduction in LCFF revenue if fewer students enroll, and/or if the unduplicated count is reflective of the districts (37%)?
1e	Charter states it will participate in ASES however the budget doesn't include ASES revenue. Please explain. Conversely, the ELOP revenue budget appears overstated. Please clarify the assumptions.
1k	Charter assumes it will have at least 55% unduplicated and therefore eligible for SB740 facility rents, leases & repairs reimbursement. What is the contingency plan if 55% is not met?
1l	Please provide more information about the nutrition program: Nutrition costs seem low - assume all students eat both breakfast and lunch under Universal Meals. Calculates to \$4.52/day/student. Also doesn't appear to include the afternoon snack that would be required with operation of ELOP. Also, what staff are responsible for managing the food program, CNIPS, securing a vendor with CDE approval, serving food, and cleanup?
1m	The petition does not identify how the LCAP will align with the budget. Please clarify
2b	<p>Charter does not include budgeted amounts for substitute teachers, however amounts are found under contracts. Substitute teachers must be school employees to claim ADA. Please clarify</p> <p>How will nursing services (non-IEP) be procured in Yrs 1 and 2? Where can this be found in the budget?</p>
2c	Facility lease estimate appears low for our area. Please provide the basis for your assumptions.
2d	<p>The budget does not include any allowance for contingencies outside of building a reserve. Please explain how the Charter will cover contingencies.</p> <p>There is a math error in the budget excluding 'other supplies' from the total. What does this line represent?</p>

3a	<p>Where are start-up costs? I.e. before July 1, 2023? Please explain your start up costs. (special ed, EL, curriculum)</p> <p>After school program was not found in the budget. Please identify budget amounts for the after school program.</p> <p>Please identify the staff who will perform the work necessary to open - admissions, recruiting; no cost was noted for the set up for Aeries, please identify costs in budget, if any.</p> <p>Where are capital start up costs for Furniture, Fixtures & Equipment (FF&E) as well as initial costs of curriculum adoption?</p>
5a	<p>Who fulfills the finance manager's role in the first 2 years?</p> <p>The petition identifies administrative services may be performed by school staff or may be contracted out, however the budget does not appear to include third party administrative services outside of back office provider. Please can you provide more specificity and clarify?</p>
5e	<p>The petition does not address the additional reporting requirements associated with a 501(c)(3) and how they will be performed. Please clarify.</p>

Impact Statement	
	No Questions

Required Declarations and Affirmations	
	No Questions

Special Education	
1a	Please provide evidence that the Charter has notified the El Dorado Charter SELPA of its intent to participate. Please provide an update on the application process with El Dorado Charter SELPA? Have you received a letter of intent to become a member from El Dorado?
3	Please provide more detail upon your reference to school site implementation (p. 81) related to the charters responsibility for ensuring all aspects of the IEP are maintained.
4	Please share the anticipated staffing and FTE for special education services? In year 1 as contracted services as well as after the first year (hired and/or contracted)?
5	Who will be the case manager for all of the special education? Would you outline the process that will be used for notifying a student's district of residence and

	authorizing LEA when a special education student enrolls, becomes eligible or ineligible, and/or leaves the charter.
6	How will you handle the process of a special education student enrolling or transferring out of the charter?

MCOE Staff Review Matrix Questions #2
February 16, 2023

Section A: Description of Vision, Mission, and Educational Program	
2b	The Charter projects year 1 enrollment is anticipated to be 95 students across grades TK-2. Please describe your process for collecting meaningful enrollment.
3	Beyond the list of 18 qualities, how will you determine if pupils are self-motivated, competent, lifelong learners?
4f	Please describe how you will implement the inclusion model.
5d	How will you address Common Core Technology standards, digital assessment, and professional learning?
6b	How will you measure growth in resiliency across grade levels and what does mastery look like?

Section J: Suspension and Expulsion Procedures	
1c	Can you please provide an explanation of how the student will be provided an opportunity to present his or her side of the story if they deny the charges?
2a	Please explain how a student will be provided timely, written notice of the charges and an explanation of student's basic rights.
2b	Please provide clarity/information

Section M: Post-employment Rights of Employees	
2	Will the collective bargaining contracts of the charter authorizer be controlling documents?

Community Impact	
1	Please describe the enrollment area of focus for your outreach.

Appendix D:

Petitioner Response to Clarifying Questions

MCOE Staff Review Matrix Questions
February 15, 2023

Section A: Description of Vision, Mission, and Educational Program	
Element 1 of the Petition (1)	
2a	<p><i>P. 4 of the response to the district findings, noted there would be 10 days of professional development at the start of the year (5 days extra duty + 5 days wrapped into teachers exempt annual salaries). Is this in addition to the 180 student instructional days? Please clarify.</i></p> <p>Yes.</p>
2b	<p><i>Please clarify the specific expectations and requirements for regular attendance, tardies, and independent study. How will the charter monitor and track attendance?</i></p> <p>We expect regular attendance. Our attendance rate is estimated at 95% per the average of similar schools in the District. (Prop 39 Letter has details) We will monitor student attendance with AERIES, or a similar student information system, which produces reports and tracking information.</p> <p>We expect parents (and families) to contact the office when students are sick, or absent. If the student is tardy due to a pre-scheduled appointment, families are expected to contact the office so the student isn't marked absent. Children who arrive late need to go to the office before going to their classroom.</p> <p>If a child is absent from school for 5 or more days, we can begin the process of independent study process. All independent study forms must be signed</p>

	<p>and dated before the absence occurs, and completed assignments must be turned into the office once the absence ends. If possible, we request that families notify the teacher of an absence of 5 days or more two weeks prior so that a meaningful independent study program is created for them.</p> <p><i>Please describe your process for collecting meaningful enrollment.</i></p> <p>We are collecting meaningful interest forms, and recruiting families and students right now. (See outreach materials) We have held information nights (online and in-person) as well as collaborated with a Spanish speaking outreach coordinator/volunteer to provide information to that segment of the population too.</p> <p>Once authorized we can begin the enrollment process, which includes a marketing and outreach campaign in English and Spanish. This will include online, open houses, meetings (online and in-person), and information in the daily newspapers and media outlets to share our new school, and attract the families and students looking for a unique and alternative program.</p>
4a	<p><i>How do you envision resilience studies being incorporated into core subjects across various grade bands? Please provide additional information regarding how skills will be measured.</i></p> <p>Professional development on the concepts and strategies of resilience are provided to teachers before school. We will then continue to meet on a weekly basis to review, debrief, and refine our ability to weave the resilience studies concepts throughout all core subjects. We will utilize thematic instruction with resilience being the theme in Math, Science, and English Language Arts as example. We will also create classrooms where there is a resilience quote (or mantra) of the day on the whiteboard, images in the room reflect diverse individuals who demonstrate resilience, and we will have key</p>

	<p>questions in the classroom. For example, we may have a teacher ask a student: Why are you feeling this way? (if they notice an emotional moment) and then ask: What will make you feel successful again? This teacher is using optimism and reframing the challenge to assist a student in becoming more resilient in a core subject.</p>
4c	<p><i>P. 96, action 1 includes notation of a performance-based learning program to demonstrate proficiency on outcomes. Can you share more about this? How will integrated support be provided to EL students in each classroom?</i></p> <p>Answered in next section (repetitive question)</p>
5a	<p><i>What process will be used to identify the effectiveness of curriculum and materials or any other student needs?</i></p> <p>Teachers and students will be interviewed about the effectiveness of the curriculum. Teachers will provide insight into the usefulness, and efficacy of the curriculum, while students will share their feedback relative to engagement, amount of effort applied, and overall reactions toward curriculum (digital and print). In addition, we will employ the Kirkpatrick Model and the four levels of engagement for evaluation of the curriculum.</p> <p>Curriculum effectiveness will also be demonstrated in the test scores and student performance (CAASP and Galileo) for core curriculum subjects after a baseline of information has been gathered.</p> <p>We will create a curriculum evaluation team comprised of parents, teachers, and administrator(s) to assist in curriculum evaluation on a yearly basis. In the meantime, faculty and administration meet weekly to discuss the curriculum, student progress, and any other student needs.</p>

	Our commitment is to continuous improvement.
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Section B: Measurable Student Outcomes TWO (2)	
1	<p><i>Measurable outcomes for individual/all (EL, SWD, SED, Foster/Homeless) subgroups are not specifically identified. Please provide. What assessments will be used to measure outcomes for student groups and what tools or methods will be used? How will this information correlate to grade level expectancies?</i></p> <p>The Charter School has met the FCMAT requirement of this question and is in alignment with charter schools already approved in Marin County.</p> <p>Specifically, the Charter School has identified in Element 3 (pages 102 – 106, please read) the assessments and assessment calendar for Healy School. This was clearly articulated in the petition utilizing CAASP, CAST, Galileo benchmarks (3 x per year), First grade readiness assessment and the RS10.</p> <p>The Charter School also identified in the petition the specific grade level expectations by subject in the curriculum, and how it will be assessed (through Report Cards and Progress Reports, formally). (See curriculum on pages 32-54).</p> <p>In addition, the Charter School will review the list of CDE approved assessments for each subgroup, and select an appropriate measure to</p>

	<p>assess outcomes for each student group. (See description of EL on pages 71-75, and ELPAC on pages 102-106).</p> <p>Again, Special Education is clearly outlined in the petition from pages 76-90, and FYH on page 90.</p>
2	<p><i>Can you provide more clarity around the specific actions and how they are related to the stated annual goals?</i></p> <p><i>pg 96 Action 1 references “performance- based learning program” , this is the first mention of this. On p.54-56 petition provides overview of instructional approach including “ teacher-centered instruction, project based learning, and experiential learning”</i></p> <p><i>Priority 3- Measurable outcome does not include a % or # to be measurable- How will you establish your baseline and growth objectives?</i></p> <p><i>Priority 4- Action 1- Please elaborate on how a testing schedule will help students demonstrate achievement.</i></p> <p><i>Action 2- states ELD to be provided during advisory- this would mean that EL students do not receive advisory. Please clarify</i></p> <p>The Charter School has met the FCMAT requirement for this question per the information provided to the petitioner.</p> <p>Some answers to your additional questions are here:</p> <ul style="list-style-type: none"> • ELD is not provided exclusively during advisory as is explained on pages 71 to 75 of the petition. EL students who might need additional assistance can receive added help during advisory – while other students also receive assistance, work on group projects, and get “caught up” on their work. The aim of advisory is to provide space, help students de-stress, and become more

	<p>resilient by not overscheduling them.</p> <ul style="list-style-type: none"> • A testing schedule is helpful to demonstrate achievement through quantifying where a student is currently, identifying gaps, and working to close those gaps as measured in their subsequent assessments / tests. • Establishing a baseline is done through initial testing and then setting reasonable, as well as achievable goals for improvement is done in coordination with leadership. HS administration is not working in a silo but part of a large network of experienced, skilled and helpful leaders working together to help each other, as well as their learning communities succeed. • Performance based learning – as you know, provides students the opportunity to demonstrate through their academic performance what they learn in the classroom (as taught primarily by teacher centered instruction).
3	<p><i>Please provide additional information/clarity</i></p> <p>The Charter School has met the FCMAT requirement for this question per pages 95 to 101 in the petition.</p> <p>The Charter School has identified specific annual actions for a new charter school to achieve stated goals clearly and is in alignment with other approved Charter Schools that reside within the Marin County Board of Education's purview.</p> <p>The nature of being an establishment (new) Charter School means that the specific action items are broad in nature creating a foundation for a healthy learning community. After a benchmark year of operations, it becomes easier and easier to create goals, which are laser-focused on granular items because the "big picture" items of securing a facility, providing Chromebooks</p>

	to students, and hiring credentialed teachers is completed.
4	<p><i>Please provide additional information/clarity</i></p> <p>The Charter School has met the FCMAT requirement per the question provided to petitioner, and in alignment with approved Charter Schools in Marin County.</p> <p>The Charter School has identified specific actions under each state priority from providing students Chromebooks to communicating CCASPP testing schedules to ensure maximum participation. As the Charter School passes it's first year of operations, gathers data, and has feedback the actions can become more pinpointed in their identification of their LCAP goals, but for a first year – new establishment Charter School these goals are appropriate, proper, and meet the standards for approval.</p>
6	<p><i>Please provide additional information/clarity</i></p> <p>The Charter School has identified in the resilience studies framework per grade level on pages 36 and 37 what is covered in the framework. On pages 34 and 35 the standards for the resilience studies program are identified, and the full curriculum has standards per grade – or as you are identifying exit outcomes per grade level relative to The Healthy Brain framework.</p>
7	<p><i>How will benchmark and specific classroom-level skills be developed?</i></p> <p>The Charter School affirms that benchmark and specific classroom-level skills will be developed. They will be developed with educational consultants with expertise in this area. (See additional information on page 39, A3).</p>
8	<p><i>How will you define “low suspension and expulsion rates”. How will the charter monitor the status of students? How will they move from grade to</i></p>

	<p><i>grade? How will the specific action as listed in the LCAP plan provide the school with what is needed for greater understanding of student outcomes?</i></p> <p>The Charter School will track and monitor suspension and expulsion rates through our attendance tracking system. Low suspension and expulsion rates will be lower than the district. California Dashboard lists NUSD's suspension rate at 2.3%, and is broken down by subgroup. If we identify a particular subgroup with a high rate of suspension or expulsion the Charter School will take corrective action. We will also review CDE data for rates, and then quantify what the suspension and expulsion rate is for NUSD elementary schools, which are goal would be lower than district.</p> <p>School Director in coordination with the school counselor will track students with a history of suspension to provide them the interventions or supports they may need to progress from grade to grade.</p> <p>The Charter School will craft their LCAP plan to ensure specific actions support achievement of goals, and greater understanding of student outcomes.</p>
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Section C: Student Progress Measurement	
THREE (3)	
5	<p><i>The report cards will utilize a 4 point rating scale. What is this based on? The petition also mentions A-G requirements. How is this relevant for a TK-5 school?</i></p> <p>Our four point rating scale for report cards is a standards based report card (SBRC). Using this type of report card helps parents and families gain a</p>

	<p>deeper understanding of student learning, and what can be done at home to support it. We selected this type of report card based on relevant research, which identifies the 4 point scale report card can show dynamic progress toward goals versus simply a static snapshot (i.e., grades with numbers).</p> <p>HS aims to focus on progress, and support in helping all students meet their academic goals, which includes using this 4 point rating scale.</p> <p>A-G requirements are not directly relevant for a TK-5 school.</p>
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Section D: Governance Structure FOUR (4)	
3b	<p><i>Please provide additional information/clarity</i></p> <p>Board is responsible for operations and fiscal affairs of the Charter School. School Director reports to the Board. Director is responsible for the day-to-day operations of Charter School.</p>
5	<p><i>Please describe internal controls designed to prevent fraud, embezzlement, and conflicts of interest.</i></p> <p>We are developing and adopting fiscal policies and procedures that govern day-to-day operations, which include the prevention of fraud, embezzlement, and conflicts of interest. There will be specific internal controls in place in coordination with our back-office provider, director (in-house) and Board of Directors.</p> <p>A draft policy is included for your review.</p>

Section E: Employee Qualifications

FIVE (5)

2	<p><i>Please clarify the counseling services that will be provided and whether this includes provision of Educationally Relevant Mental Health Services (ERMHS) should this service be identified in any student Individual Education Programs (IEPs)?</i></p> <p><i>The petition identifies additional instructional assistance to serve the needs of English Learners, however we are unable to find any positions, either in salaries or contracted services. Please clarify.</i></p> <p><i>We note the Finance Manager does not begin until Year 3 of the proposed operations. Please clarify who will perform the Finance Manager's role for the first two years?</i></p> <p>Yes. We will hire a credentialed school counselor as evidenced in the budget, which will provide ERMHS if this is identified in the IEP.</p> <p>Teachers will hold a C-CLAD or B-CLAD credential who are serving English Learners. If a teacher is a GE teacher but serving EL then they must also hold the proper credentialing for serving EL learners.</p> <p>Finance Manager role will be performed by the back-office provider for the first two years in coordination with the School Director and Office Manager (on-site).</p>
3	<p><i>Please refer to questions related to who will monitor and administer requirements under the health and safety practices element.</i></p> <p>Health and safety is of the utmost importance to the Charter School.</p>

	<p>We will adhere to all applicable laws, which includes proper administration of meal services, medication administration, vision and hearing screenings, as examples.</p> <p>The School Director is ultimately responsible for administering and monitoring the Health and Safety policies and procedures until we hire a part-time person dedicated to this role. We anticipate hiring a part-time person dedicated to this role on a contract basis during year one and two. The budget allows for this.</p>
4	<p><i>Please share specific recruitment strategies the Charter will utilize to attract a diverse applicant pool. What are the Charter's recruitment strategies to attract and recruit staff with a salary and benefit structure that is less attractive than similarly situated schools in Marin County (especially in light of the other Charters participating in Retirement Systems)?</i></p> <p>Charter School has developed an employee value proposition (EVP), which consists of compensation and benefits, professional development, culture/working environment, and mission/fit for the role. Financial compensation is one part of our EVP, which will attract staff and leadership to our program, but not our only one. We have already been in contact with teachers who are interested in working at our school with a resilience studies program in an inclusive environment where they receive weekly mentoring. As additional funds become available, we are considering creative ways to compensate our employees for their time, dedication and commitment to excellence.</p> <p>The current compensation program can attract staff and leadership, especially those with varying needs and experiences. Most charter schools, particularly new and small schools, do not necessarily have the budget to afford similar benefits to traditional school districts; however, they regularly</p>

	<p>attract and retain high-quality staff. The decision to decline to participate in the State Teachers' Retirement System ("STRS") is due to the exorbitant employer cost of the program, currently at 19.1%, as well as the disinterest in the program from a large pool of teachers. A large majority of new charter schools throughout California have opted out of STRS over the past 7 years, and have had their charter petitions approved and attracted high quality teachers and staff.</p> <p>The Charter School doesn't necessarily believe they are "in competition" with other schools, but fills a unique gap in our educational landscape. Our aim is and will continue to be a complement to Novato and Marin based public and alternative educational programs (for example, Charter Schools).</p> <p>Specific methods for recruitment include, but are not limited to:</p> <ul style="list-style-type: none"> • Posting positions online through indeed.com, edjoin.com, BA-TTI.org (Bay Area Teacher Training Institute), chartercenter.org (job board), and linkedin.com, as examples. • Post positions at local universities graduating credentialed teachers such as Dominican University. • Advertise job openings in bilingual newspapers (for example, Lavo.us and El Tecolote) that have job boards/openings. • Participate in local in-person and online Job Fairs (for example, San Rafael Job Fair) • Post positions at caljobs.ca.gov (English and Spanish) • Contact employment agencies for school leadership role, as needed (for example, Calwesteducators.com)
6	<p><i>Will there be any non-core teaching positions? How does the Charter anticipate supporting instruction in areas of art, music, and library services?</i></p>

	<p>We have budgeted for credentialed teachers. The Charter School will work with the teachers to integrate art into the classroom, which is wrapped into the History & Art slot in their schedule. Opening as a small school this is typical in the beginning. The Charter School will continue to fundraise to hire (part-time) teachers for Art, Music, and Library Services (non-core teaching positions).</p>
7	<p><i>Please provide clarification on the proposed staffing and teacher-to-student ratio for TK?</i></p> <p>For TK our teacher to student ratio is: 10:1 Our staffing is one Teacher, and 1 Paraeducator per classroom</p>

Section F: Health and Safety Procedures SIX (6)	
1	<p><i>What is the timeline for completion of the actual plan, inclusive of training implementation?</i></p> <p>The Charter School has met the FMCAT requirement for this numbered question, however we can respond to your additional question. We plan to complete the actual plan within 60 days. Training implementation of the plan will follow its completion and the hiring of appropriate staff to be trained.</p>
5	<p><i>Can the petitioner provide any detail on plans for any of these policies/practices, including who will monitor and administer requirements of the referenced codes especially in the first two years of operation? What is the projected cost? The projected costs appear to be included in the budget beginning in 2025-26 or the third year of operations under contracted services. Please describe how ongoing administration and monitoring of</i></p>

	<p><i>Health and Safety policies and procedures will be performed for the first two years of proposed operations.</i></p> <p>The Charter School will add “seismic activity” to the list of potential natural disasters (earthquake preparedness and structural integrity). We will also add a notification to students, parents and guardians on how to access mental health services on a yearly basis, at minimum. With these two edits, the Charter School has met the FCMAT criteria for this question.</p> <p>Ultimately, the School Director is responsible for administering and monitoring the Health and Safety policies and procedures until we hire a part-time person dedicated to this role. We anticipate hiring a part-time person dedicated to this role on a contract basis during year one.</p>
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Section G: Racial and Ethnic Balance SEVEN (7)	
1	<p><i>How do you define your diverse population? Please share specific strategies that you intend to use to reach a diverse student population</i></p> <p><i>The petition states the Charter expects 63% of the student population will qualify for free and reduced price meals and that 16% of the student body will be English Learners. NUSD demographics indicate that a higher percentage of English Learners results in a higher percentage of low-income students. Please provide more detail on the expected demographics of Healy School.</i></p> <p>We define our diverse population to be inclusive of race, ethnicity, language, and students with disabilities. Specific targeted approaches to reach these populations include advertising in special education journals and websites serving this population, advertising in English</p>

	<p>and Spanish newspapers, as well as online media blasts, as examples.</p> <p>Demographics of the Charter School are explained in pages 19 and 20 of the petition. We expect the Charter School demographics to reflect the community of Novato we intend to serve. Specifically, we anticipate that our student, staff, and family population will be diverse as defined by our definition of diversity (see above).</p> <p>Exact numbers are unavailable until open enrollment, however we have identified some methods we intend to employ to attract diverse faculty, staff, and students (See answers in employee qualifications, racial and ethnic balance, and Prop 39 letters).</p> <p>While NUSD as a whole may be 38% unduplicated, 35% low income, and 17% EL we anticipate that we will be higher focusing on Southern Novato for the majority of our students. As stated before, all students are welcome to come to our Charter School, however we anticipate students from primarily that geographic area with the corresponding demographics. (See Prop 39 Letter, page 4-6 dated 11/1/22)</p>
2	<p><i>The petition notes that the Charter will strive to achieve racial and ethnic balance. Please describe the practices and policies that will accomplish this.</i></p> <p>The Charter School has affirmed that it will strive to achieve a racial and ethnic balance, and therefore has met the FCMAT requirement of this question.</p> <p>Specifically, the Charter School has a DEI policy, which communicates to students and families that they are welcome at our school. Implementing our outreach, and marketing plan will include focusing on families and students from different cultures, ethnicities, languages, abilities, and interests. Our aim is to reach families online, and through targeted</p>

	<p>communication where they can read about our school in their native language and understand the process to enroll, if they so desire.</p> <p>Some examples include, but are not limited to:</p> <ul style="list-style-type: none"> - Bilingual information night - Website (and all marketing information) in English and Spanish - Bilingual flyers - Online marketing (English and Spanish) - Marketing in newspapers and outlets in the Spanish language (Lavoz.us and El Tecolote, as examples)
4	<p><i>Please provide examples of supports and how they may help to maintain enrollment balance?</i></p> <p>The Charter School will hire diverse staff to support students, faculty, and families. We seek a school counselor and office manager that will be bilingual, and representative of the community that we serve. Our DEI policy emphasizes how important supporting our students are, and our commitment to Diversity, Equity, Inclusion, and Belonging.</p> <p>Our resilience studies framework emphasizes the importance of supportive relationships, and providing immigrant students with “buddies” who can help them assimilate is one feature of our program, and will help attract, as well as maintain a diverse population that feels supported, safe, and connected.</p> <p>The Charter School seeks to hire diverse faculty and staff so any preferences in admissions don’t change the racial and ethnic balance of the population. All communication from the Charter School will be available in English and Spanish, as well as available in the native language of any family, guardian or student (contracted through local translators).</p>

	<p>One essential component of our Charter School values is continuous improvement, and we believe through regular feedback, interactions, and wellbeing surveys administered we will be on the “lookout” for ways to improve, and serve our population so that we can retain, as well as grow our diverse population.</p>
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Section H: Admissions Policies and Procedures EIGHT (8)	
3	<p><i>Please clarify how the community will be informed and given an equal opportunity to attend the charter school.</i></p> <p>The Charter School admission policies and procedures are on page 135 to 139 in the petition, and they are in alignment with other charter schools approved in Marin County.</p> <p>All material on the website (healyschool.org), petition, and online have communicated to parents and guardians that all students are welcome at Healy School. We have consistently communicated to all of Novato that a charter school is a type of public education that is open to all students, and is tuition-free.</p> <p>Throughout these 40 pages of questions and answers the Charter School has consistently explained that through online, print, and in-person communication parents and guardians, as well as students will be given an equal opportunity to attend the charter school.</p> <p>Communication to interested families is available online in English and Spanish, and other languages by request.</p>
4 General (misnumbered)	<p><i>The petition identifies that the lottery will be conducted in the spring and that all rules, deadlines, and times of the public random drawing will be</i></p>

)	<p><i>communicated in the application process. Can you provide any further clarity on the timeline for specific steps in the lottery process?</i></p> <p>Once the Charter School receives authorization, we will create an immediate and specific timeline for the enrollment and lottery process during the application process. However, with a mid-March approval, we anticipate the lottery will occur the first week in May of 2023, if needed.</p>
5	<p><i>The petition states that the Charter School will hold a public random drawing (i.e., a lottery) to determine admission for the impacted grade level, with the exception of existing students in good standing, who are guaranteed admission in the following school year. However, does not state what it means to be a student “in good standing” (p. 137). What does “in good standing” mean?</i></p> <p>Good standing means a student was enrolled in the prior year of the Charter School.</p>
6	<p><i>Can you say more about the preferences and how they are not likely to impact the racial, ethnic, and unduplicated pupil balance?</i></p> <p>The Charter School is a small school, which seeks to be reflective of the community and demographic we will serve. Preferences are not likely to impact the racial, ethnic and unduplicated student balance because we are hiring a limited number of teachers and staff – as well as we are seeking to hire diverse candidates. Through hiring diverse candidates, we are ensured that the preferences are likely to not impact the racial, ethnic and unduplicated student balance.</p>

Section I: Annual Financial Audits

	No Questions
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Section J: Suspension and Expulsion Procedures TEN (10)	
General	<p><i>Expulsion procedures include a hearing before an Administrative Panel consisting of at least (3) members who are certificated and neither a teacher of the student nor a Board member (p.159). How will the Charter adhere to this policy if there are not enough certificated staff to fulfill this procedure?</i></p> <p>If the Charter School does not have at least 3 certificated members the board becomes the final arbiter, and would adopt a policy to change procedure.</p> <p>Page 142-170 of the petition explains the Suspension and Expulsion Procedures.</p>

Section K: Staff Retirement System	
	No Questions

Section L: Public School Attendance Alternatives	
	No Questions

Section M: Post-employment Rights of Employees	
1a	<i>Will the charter transfer sick leave of an employee leaving the Charter?</i>

	No.
1b	<p><i>How is the Charter addressing service credit/ tenure?</i></p> <p>We are not providing service credit or tenure. During the hiring process, we always will take into consideration all experience.</p>

Section N: Dispute Resolution Procedures FOURTEEN (14)	
2	<p><i>The petition references policies to address complaints. Have these policies been developed?</i></p> <p>The Charter School is developing a dispute resolution policy, which will be in alignment with how peer Charter Schools in Marin County effectively run their elementary schools.</p>

Section O: Closure Procedures FIFTEEN (15)	
<p>Healy School is a non-profit with a 501c3 status. The official name is Healy School Incorporated.</p> <p>In the event the Charter School will close, we will follow Ed Code and all applicable laws. Specifically, we will follow the closure procedures set forth in the California Code of Regulations (that has a checklist).</p>	
1a	<p><i>The petition does not identify the responsible entity or person that will</i></p>

	<p><i>conduct closure- related activities and instead states that in the event of school closure the board of directors will identify a person or persons responsible for closure related activities. Please identify the specific entity or individual responsible for closure related activities.</i></p> <p>In the event of closure, the Charter School would designate the School director to be responsible for the closure activities.</p>
1b	<p><i>Please provide information as to how the Charter will communicate to all interested parties will occur promptly in the event of closure?</i></p> <p>The Charter School will follow the Ed Code and California Code of regulations, which identifies how communication must occur to parents and guardians, staff and faculty, the CDE and other interested parties (written, digital, official notifications, and next steps).</p>
2	<p><i>The manner in which parents and guardians may obtain copies of pupil records if the charter school closes refers to the 'entity responsible for closure related activities'. Can you be more specific?</i></p> <p>The Charter School will adhere to all applicable law, and assign an individual or organization (i.e. entity) to provide copies of pupil records to parents and guardians upon closure. Named individual or entity will translate procedural information to parent or guardian's native language and follow all relevant state and local laws.</p> <p>The Charter School would also request the District to store and maintain responsibility for the pupil records in the event the charter school closes, as this is the most logical and appropriate solution since technically the Charter School students are likely to be students of the District.</p>

3b	<p><i>Addresses disposition of residual assets by referring to the articles of incorporation which identify 'a non-profit'. Please provide the name of the non-profit.</i></p> <p>Healy School Incorporated</p>
3c	<p><i>Identifies that residual assets will remain the property of the Healy School non-profit and will be disposed of and when the non-profit corporation is dissolved. Please provide the name of the non-profit.</i></p> <p>Healy School Incorporated</p>

Back Office Provider	
1	<p><i>The petition states a provider will be used for finance operations - payroll, ap, accounting, budget and finance and that a finance officer will also be hired in year 3. Who fulfills the finance officer's role for the first two years? Will there be any change in the services provided with the hiring of the finance officer? The budget indicates the back-office services grow with inflation and enrollment.</i></p> <p>Healy School has utilized ExED as their back-office provider for financial management and operations during the start-up phase. Once authorized, they will request RFP's from ExED and EdTec and then choose a back-office provider for SY 23-24 (with authorizer's preference accounted for).</p> <p>During the first two years of operation the School Director in coordination with the back-office provider fulfill the finance manager role. Like the majority of new charter schools, the majority of the financial management role is handled by the back-office provider in coordination with the school</p>

	<p>administrator (on-site). Once a finance manager is hired in year three, the role of the back-office provider will be reduced as the role is taken in-house and services provided by the back-office provider are reduced.</p> <p>School director will take responsibility for the higher level financial management such as risk management, financial planning and strategy, and facilities oversight during the first two years in coordination with the back-office provider. School director will be in a mentorship program with other charter school leaders who have successfully created sustainable and prosperous new schools, so they are working with support of a larger network of school leaders.</p>
2	<p><i>The petition clearly indicates the Healy School will provide timely submissions of calendared items by their respective due dates, however does not identify which items the back office provider will be responsible for preparing. Please identify what reporting items the back office provider will provide.</i></p> <p>The Charter School has met the FCMAT requirement that the back-office provider will provide timely submissions of calendared items by their respective due dates. Those items include but are not limited to:</p> <ul style="list-style-type: none"> • 1st and 2nd interim reports • unaudited actuals • any other financial reporting required for specific funding sources or upon request by the authorizer, county or state • Weekly cashflow reports to school director <p>All reports will be reviewed by the school administration, and approved by the school board as needed.</p>

3

Petition does not indicate the back office provider will provide timely submissions of requests for information. Please describe the role the school expects the back office provider to play.

Healy School will ask EdTec and ExED for a RFP once authorized, and choose one of the two back-office providers for assistance with financial management and operations. Currently, ExED has been working with Healy School on back-office operations for the start-up phase of financial management and operations, as noted with Jessica Norman being at the Ad Hoc Committee meeting and answering questions.

Back-office provider will work in coordination with the School Director (on-site) to manage the financial operations of the Charter School, which includes timely reporting to the District, County, State and Government. The Charter School recognizes the complexity and volume of reporting requirements, which is why in year three they have budgeted for an on-site finance manager as the school grows.

Some duties of the back-office provide include but aren't limited to:

- Manage the accounting system (Accounts Payable/Accounts Receivables)
- Formulate financial policies and procedures for the Charter School
- Administer payroll
- Yearly, monthly, quarterly budgets and presentation (and training) to the Board of Directors
- Board presentations are monthly by back-office provider (cashflow projections, ADA update, financial statements, etc.)
- Coordinates with third party audit firm
- Weekly cashflow reports to school director
- Any financial reporting requested from Federal, State, County, or

	<p>District</p> <ul style="list-style-type: none"> - Provider trains school staff on accounting and financial management (accounting system, payroll, A/P, A/R, and more) - Assist school with identifying and managing debt
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Charter Management Organization	
1	<p><i>Identifies that the Healy School will provide its own administrative services through either its own staff or an appropriately qualified third-party contractor. We were unable to find costs for a contractor in the budget. Please can you clarify?</i></p> <p>Financial and operational needs provided by third party are located in the budget (line item 5859, All Other Consultants). The Charter School will work in coordination with their chosen back-office provider to handle federal and state reporting requirements.</p> <p>Administrative services are either provided for in-house, or contracted out similar to the other Charter School in Novato, CA. The budget allows for the cost of a part-time person if the Charter School decides to use a part-time individual (contract role).</p>

Community Impact	
2	No questions

Facilities	
<p>The Charter School is in the Prop 39 process with the District, and also continues to look for an appropriate lease for the first two years of operations, at minimum.</p>	
1a	<p><i>Please describe the size of facilities the Charter intends to secure</i></p> <p>The Charter School has been looking at securing a facilities lease that is the size of approximately 70 square feet per student. We are looking at space that is between 8,500 and 10,000 square feet that is in the district and is appropriately zoned. The Charter School is working with experts in the field of securing appropriate facilities for new charter schools, which are suitable for an elementary school and meet the safety guidelines.</p> <p>The Charter School has been focused on Southern Novato to secure a private facility, however we continue to look in Southern and now central Novato for an appropriate facility.</p>
1b	<p><i>A facility has not been secured, and a schedule for securing the facility is not identified, nor is the person responsible for securing the facility. Please describe the school's facility plans.</i></p> <p>Maureen Healy, lead petitioner, with approval from the Board of Directors is responsible for securing the facility. We intend to secure an appropriate facility by May 1, 2023, either through leasing a private facility or the Prop 39 process, as mentioned above.</p> <p>We continue to use all of our available options to secure an appropriate space within the geography, and confines of the District.</p>
1c	<p><i>Please describe how potential sites will be assessed for suitability?</i></p>

	<p>The Charter School has been working with experts in the field of securing appropriate facilities for a new charter school in California. This includes a real estate agent in Marin with this expertise, a lawyer from California Charter Schools Association (CCSA) who specializes in facilities and has provided an assessment guide, as well as working with the City of Novato relative to securing the appropriately zoned location.</p> <p>We remain interested in the District making the Charter School an offer relative to the Prop 39 process where they have available/appropriate space, and we could co-locate for the first two years of operations.</p>
2a	<p><i>The petition does not identify any potential sites, their future availability or a timeline to secure and prepare for school opening. Please provide any contingency plans for securing alternate facilities if your request for Prop 39 is not granted.</i></p> <p>The Charter School has seen multiple sites that may be suitable, and would seek to secure a site – ready for opening, by June 1, 2023.</p>
2c	<p><i>The budget for rent appears low given minimum space requirements for each classroom and Marin County facility lease rates. Please provide us details that support the assumptions for this budget line. In addition we note the school anticipates receiving SB740 funding to offset 75% of rent costs, however, eligibility for this funding is based on at least 55% of the student population qualifying as low-income. Please see additional questions for Element 7 regarding the anticipated demographics of the student population. Please provide your contingency plans if the Charter does not meet the 55% requirement for SB740 funding.</i></p> <p>This question has been answered in other questions: See Financial and Administrative Plan section (1k, 2c). Please see clarification provided on</p>

	<p>the two eligibility options for SB740 funding. Additional demographics for Healy School are answered in Section G: Racial and Ethnic Balance (1). Contingency plan also described in Financial and Administration Plan section (1a and 1k).</p>
2d	<p><i>We understand the Healy School made a timely request to the NUSD for facilities under Prop 39, however, the district made a timely request for additional supporting information relative to projected enrollment and absent such support has denied the school's request for facilities. Please provide your response to the District. What is the anticipated plan for facilities if the enrollment is less than 80 ADA from Novato?</i></p> <p>The Charter School disagrees with the District's assessment, and will respond to their Prop 39 response dated February 1, 2023. We remain in the Prop 39 timeframe, and stand ready to work with NUSD on an appropriate space for this alternative education program. We believe there is likely space that is available and viable such as Nova Education Center at 720 Diablo Avenue. If a space isn't offered or acceptable to the Charter School we will secure a private lease that is appropriate.</p>

Financial and Administrative Plan	
1a	<p><i>Charter assumes 95 students will enroll in year 1 with a 63% unduplicated count. What is the contingency for associated reduction in LCFF revenue if fewer students enroll, and/or if the unduplicated count is reflective of the districts (37%)?</i></p> <p>If enrollment is below 95 students or the UPP is lower than projected, the school will need to make cuts and adjustments. These will depend upon how low enrollment is, but could include:</p> <ul style="list-style-type: none"> - reduction of School Director salary,

	<ul style="list-style-type: none"> - cutting the Kindergarten paraeducator - reducing the Office Assistant hours, - teachers on staff could be changed if student enrollment didn't warrant the same number of classrooms, - professional development could be modified, and - cuts to materials, supplies, books, computers/equipment, furniture, and other overhead would be likely, as examples. <p>Budgets are living documents that need to be revised as things change throughout the year. Charter schools are fortunate to have the flexibility to make adjustments to their budgets as needed and can be highly responsive in their efforts to do so.</p> <p>NUSD unduplicated count is the overall district, and as Healy School's Prop 39 indicates we have submitted with comparison schools with similar unduplicated counts. The geography of the majority of HS students are likely to be in central and southern Novato, California.</p>
1e	<p><i>Charter states it will participate in ASES however the budget doesn't include ASES revenue. Please explain. Conversely, the ELOP revenue budget appears overstated. Please clarify the assumptions.</i></p> <p>The ASES program requires an application and award from the State of California so it is not guaranteed and therefore not included in the budget. Should the school receive an ASES grant, it would have additional funds to run an afterschool program with more program expenses.</p> <p>ELOP funding is assumed to begin in Year 2 of the school's operations as it is based on prior year ADA. The funding rate for schools with less than 75% UPP is estimated at \$1,250 per prior year UPP ADA. This results in $\\$1,250 \times 56.7 = \\$70,925$ in Year 2. The current year (22/23) funding rate</p>

	<p>for schools < 75% UPP is actually significantly higher - \$2,053, but the funding for these schools is based on the amount of remaining funding. To be conservative, we used \$1,250 - a number far less than what was available in 22/23. Finally, please note that there is a minimum grant amount of \$50,000 for ELOP, regardless of UPP or ADA.</p>
1k	<p><i>Charter assumes it will have at least 55% unduplicated and therefore eligible for SB740 facility rents, leases & repairs reimbursement. What is the contingency plan if 55% is not met?</i></p> <p>The Charter School would need to make cuts or borrow money to cover expenses if they weren't eligible for SB740 facility rents, leases, and repairs reimbursement. Please note: there are two ways to qualify for SB740, which is to either have the 55% unduplicated count or be located in the attendance area of an elementary school that has 55% UPP.</p> <p>The Charter School remains in the Prop 39 process, as well as is seeking a private facility within the District.</p>
1l	<p><i>Please provide more information about the nutrition program: Nutrition costs seem low - assume all students eat both breakfast and lunch under Universal Meals. Calculates to \$4.52/day/student. Also doesn't appear to include the afternoon snack that would be required with operation of ELOP. Also, what staff are responsible for managing the food program, CNIPS, securing a vendor with CDE approval, serving food, and cleanup?</i></p> <p>Nutrition costs can be adjusted by level of students participating in the meal program. The event of 100% of students participating is unlikely, but possible. If meal participation is higher than budgeted for, the costs for meals will be higher and will be offset by higher reimbursements from the federal and state child nutrition programs. The school will budget for a</p>

	<p>school snack in year 2, which will be offset by reimbursement funding. During year 1, the Charter School will provide a proper snack for the ELO program and be accounted for in budget actuals. Again, there is no requirement to participate in ELO in year one of the charter school, however HS felt it was important to offer extended learning, and will continue to seek additional funding to close any financial gaps that may arise in the opening of a new school.</p> <p>Regardless, any additional meal cost will have no net impact on the budget due to the accompanying reimbursement funding.</p> <p>Office manager is responsible for being the point person for the after-school meal program. They will coordinate with the CDE approved vendor, and coordinate staff on serving food and cleanup. School Director will submit to the Board of Directors information on CDE approved vendors for food services to make the final determination.</p>
1m	<p><i>The petition does not identify how the LCAP will align with the budget. Please clarify.</i></p> <p>The LCAP will align with the budget by including the expenses from the budget that are associated with the appropriate LCAP priorities and actions. The budget and LCAP will be completed concurrently and in close coordination.</p>
2b	<p><i>Charter does not include budgeted amounts for substitute teachers, however amounts are found under contracts. Substitute teachers must be school employees to claim ADA. Please clarify.</i></p>

	<p>Charter schools may use third-party contractors to provide substitute teachers when needed. The substitute teachers do not need to be employees of the school, they just need to have the proper credentials.</p> <p><i>How will nursing services (non-IEP) be procured in Yrs 1 and 2? Where can this be found in the budget?</i></p> <p>Health and safety services (such as medical care, and medical administration) will be contracted out part-time during years 1 and 2, as possible. The current budget doesn't account for a medical assistant (or LPN/CNA), however as the budget is a living document (not static) the Charter School budget can allow for this, and it will be reflected in actuals.</p>
2c	<p><i>Facility lease estimate appears low for our area. Please provide the basis for your assumptions.</i></p> <p>Healy School has seen multiple private facilities zoned for an elementary school within the NUSD boundaries. The Charter School continues to seek the appropriate private facilities as our first choice, and only pursued Prop 39 as an alternative, if needed.</p> <p>Some prior facilities viewed included:</p> <ul style="list-style-type: none"> - 1787 Grant Avenue – Owner was open to renting us the space, which would need some investment from the Charter School (repairs). This location is zoned correctly, and floor plan is suitable since it was a privately run school. (\$2.00 per square feet inclusive of utilities) so if we rent the 6,000 square feet, the cost would be \$12,000 inclusive of utilities and most expenses. This is in line with the budget, which lists utilities separately. (Sidenote: The long-term goal for this space is turn into condominiums so this would be only a temporary solution).

	<p>- 3833 Redwood Highway, Building One (\$1.20 per square feet) so if we rent 7,000 square feet to begin that would cost us \$8,400 with a first rights to lease for neighboring and available space. We could begin with 7,000 and then expand to 9,500 sq ft that would cost us \$11,400. This would be space for the first two years as we grow, and adjust our financial model with funds. Utilities are above the base rent.</p> <p>Other comparison school rents were located in San Rafael, and Mill Valley within the price range we budgeted, however we continue to look within the NUSD district for a suitable location.</p> <p>As we are all aware, the rental market for commercial and school zoned space is dynamic, and if rental market rates increase or decrease, we will adjust our budget to reflect and plan for the most accurate facility lease costs. Our intention is to “lock in” a good lease for the first two to three years of operation, and then secure – if and as needed, a more permanent space for the continued operation of the Charter School.</p>
2d	<p><i>The budget does not include any allowance for contingencies outside of building a reserve. Please explain how the Charter will cover contingencies.</i></p> <p>The school will use the reserve for contingencies in the budget, a specific line item is not required. The school will aim to maintain and grow its reserves to cover contingencies such as emergencies, unexpected expenses, lower enrollment, and state budget cuts.</p> <p><i>There is a math error in the budget excluding ‘other supplies’ from the total. What does this line represent?</i></p>

	<p>Actually, there isn't a math error in the budget. Other Supplies are included in the total for Supplies (4000). The Detailed Budget shows the subsets of Other Supplies including Food, Uniforms, PE, Before/After School, and All Other Supplies, which all add up to the Other Supplies amount of \$11,925. This is then included in the Total Supplies of \$181,326.</p>
3a	<p><i>Where are start-up costs? I.e. before July 1, 2023?</i></p> <p><i>Please explain your start up costs. (special ed, EL, curriculum)</i></p> <p><i>After school program was not found in the budget. Please identify budget amounts for the after school program.</i></p> <p><i>Please identify the staff who will perform the work necessary to open - admissions, recruiting; no cost was noted for the set up for Aeries, please identify costs in budget, if any.</i></p> <p><i>Where are capital start-up costs for Furniture, Fixtures & Equipment (FF&E) as well as initial costs of curriculum adoption?</i></p> <p>Start-up costs prior to July 1, 2023, are not identified as one line item in the budget. Costs of recruiting (contractors, as needed), technology consulting, and marketing / advertising are listed in the budget for Year One. Prior to opening, Year 0 the start-up phase isn't outlined in the budget submitted (as it is not required) to the authorizer for review, however we have budgeted for Year 0 with private monies, which are utilized to pay Legal, Marketing, Staff, and other ad hoc expenses prior to opening.</p> <p>The FCMAT start-up cost question relates to Year 1-3, which is part of the</p>

	<p>petition. Furniture, Fixtures and Equipment, as well as initials costs of curriculum adoption are embedded into the Year One budget in The 4000 series, including line items 4111, 4211, 4311, and 4411.</p> <p>The ELOP is embedded in the budget starting in Year 2, however prior to Year 2 the ELOP is not required and can be found in the budget, see 2121 After School Staff Salaries, and 4395 Before & After School Program Supplies. Again, HS feels strongly that offering ELOP is central to our mission of empowering, educating, and inspiring students to fulfill their potential and build resiliency.</p>
5a	<p><i>Who fulfills the finance manager's role in the first 2 years?</i></p> <p>This was answered in the Back-Office Provider section.</p> <p><i>The petition identifies administrative services may be performed by school staff or may be contracted out; however the budget does not appear to include third party administrative services outside of back office provider. Please can you provide more specificity and clarify?</i></p> <p>The Charter School will hire a back-office provider (either ExED or EdTec) for financial management and operations services in Year One (See Back Office Provider questions/answers). In coordination with the back-office provider the Charter School's Board of Directors will choose how to contract administrative services such as HR and Payroll. Currently, we have budgeted for the back-office provider to manage payroll, however we will access what is available to us once authorized (for example, the authorizer may handle our HR, and charge us for this service per an MOU).</p> <p>All staff and administration will be given professional development relative</p>

	to employment law and relevant Ed Code. The Office Manager in coordination with the School Director will have on-site responsibility for administrative services they can perform properly and in coordination with any third-party we contract with.
5e	<p>The petition does not address the additional reporting requirements associated with a 501(c)(3) and how they will be performed. Please clarify.</p> <p>The third party audit firm will also complete annual required filings including the Form 990.</p>

Impact Statement	
	No Questions

Required Declarations and Affirmations	
	No Questions

Special Education	
Special Education is covered in Element One in the petition from page 76-88	
1a	<p><i>Please provide evidence that the Charter has notified the El Dorado Charter SELPA of its intent to participate. Please provide an update on the application process with El Dorado Charter SELPA? Have you received a letter of intent to become a member from El Dorado?</i></p> <p>Healy School is applying for the El Dorado SELPA (Cohort 2) and is providing them a packet of information, which is due by EOD Friday,</p>

	<p>February 24, 2023. Our contact at El Dorado SELPA is Amy Ferguson (see attached email).</p> <p>We anticipate being inducted into El Dorado SELPA in-person in their May New Partner Induction meeting. Healy School will provide their authorizer all the proper documents to evidence their SELPA participation.</p>
3	<p><i>Please provide more detail upon your reference to school site implementation (p. 81) related to the charters responsibility for ensuring all aspects of the IEP are maintained.</i></p> <p>Healy School has met the FCMAT requirement as evidenced in the material provided to the petitioners. If you have a specific question, please send it to the petitioners.</p> <p>Healy School stands behind the language and intent of our Special Education services as outlined in the petition (Pages 76-88 of the petition). We will follow all Ed Law inclusive of transportation, and SELPA policies as well as procedures.</p>
4	<p><i>Please share the anticipated staffing and FTE for special education services? In year 1 as contracted services as well as after the first year (hired and/or contracted)?</i></p> <p>The Charter School will contract services for special education students depending on their needs. In year 1, we have budgeted \$40K for an outsourced Special Ed teacher and \$63,750 for other outsourced special education services (speech, psychologist, nurse, behavioral, evaluations, and what is relevant for our population), and a portion of the School Director's time.</p>

	<p>In year 2, we will bring on a part-time special education teacher as we have planned for in our budget (.6 FTE) at \$42k plus \$109,450 for outsourced services. In year 3, the special education teacher is a full-time employee.</p>
5	<p><i>Who will be the case manager for all of the special education? Would you outline the process that will be used for notifying a student's district of residence and authorizing LEA when a special education student enrolls, becomes eligible or ineligible, and/or leaves the charter.</i></p> <p>School counselor will be the case manager for all special education. The Charter School will follow all applicable laws, and policies within the SELPA, which include notification of a student's school district and authorizing LEA when a special education student enrolls, becomes eligible or ineligible, and/or leaves the charter.</p> <p>The Charter School will provide authorizer will all policies and procedures in alignment with all applicable laws.</p>
6	<p><i>How will you handle the process of a special education student enrolling or transferring out of the charter?</i></p> <p>The Charter School will adhere to all applicable laws, and ensure a student's new school has a copy of their IEP, as well as their student records.</p>

MCOE Staff Review Matrix Questions #2
February 16, 2023

Section A: Description of Vision, Mission, and Educational Program	
2b	<p><i>The Charter projects year 1 enrollment is anticipated to be 95 students across grades TK-2. Please describe your process for collecting meaningful enrollment.</i></p> <p>The Charter School has met the FCMAT requirements for this question, and has identified attendance expectation and requirements including enrollment projections (See pages 11, 199 and 200 in the petition. In our Prop 39 letter, we clarified our expectation of 95% ADA as the average of Novato peer elementary schools – you should have this document too. This question has been answered previously in this document).</p> <p>The Charter School has connected with interested parents and guardians through online, in-person, and virtual events, which they answered questions about the curriculum, school facility, faculty, model, and program for the 23-24 School Year. We will advertise in print and digital media, which will include English and Spanish, as well as continue to host events to share our program with all subgroups, as well as advertise in specific journals and locations where they will find our information. Again, we are collecting interest forms, and will collect meaningful enrollment in the same manner, which other Charter Schools approved and operating in Marin County do so.</p>
3	<p><i>Beyond the list of 18 qualities, how will you determine if pupils are self-motivated, competent, lifelong learners?</i></p> <p>The Charter School has met the FCMAT requirement of this question on page 28 and 29 that describe what an educated person is in the 21st century. The skills identified will be utilized as a starting point to create a rubric, and quantified by grade level to ensure we are supporting skill development of</p>

	<p>Charter School students becoming self-motivated, competent learners throughout their lives.</p> <p>Resilience Studies inclusive of the framework and standards will also have a rubric to ensure growth and skill development (see pages 32-42) and the goals on pages 94-101 identify goals for students. Please note this is an establishment charter petition (new), which means schools in their first year may have broader goals as they collect data, and benchmark progress monthly.</p>
4f	<p><i>Please describe how you will implement the inclusion model.</i></p> <p>The Charter School has met the FCMAT requirement for this question.</p> <p>Specific to your additional question, the Charter School seeks to include special education students in the GE classroom per their IEP or 504 plans whenever possible. We will “push in” supports and services pursuant to their IEP and 504 plans. If SPED students per their IEP or 504 plan benefit from being “pulled out” of the classroom to receive specific instruction or assistance, then we will do so with the corresponding credentialed teacher in that classroom.</p>
5d	<p><i>How will you address Common Core Technology standards, digital assessment, and professional learning?</i></p> <p>The Charter School has addressed CCSS in their technology selection.</p> <p>All selected curriculum (print and digital) are in alignment with the CCSS, and digital assessments and professional learning are in alignment with Common Core Technology standards.</p>
6b	<p><i>How will you measure growth in resiliency across grade levels and what does mastery look like?</i></p> <p>The Charter School has met the FCMAT question requirements per the</p>

	<p>information provided to the petitioner.</p> <p>Please see page 33 to 37 for resilience standards and framework. The Charter School identified utilizing RS10 to assess a student's level of resilience across grade levels (see section on student outcomes). This question was also posed, and answered previously (see additional information in question 3 of this section).</p>
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<p>Section J: Suspension and Expulsion Procedures</p> <p>Pages 142- 170 in the petition</p> <p>All language in the Suspension and Expulsion element is standard, and in alignment with other Charter Schools approved in the County of Marin.</p>	
1c	<p><i>Can you please provide an explanation of how the student will be provided an opportunity to present his or her side of the story if they deny the charges?</i></p> <p>This is on page 160 of the petition. The suspension and expulsion procedures in the petition are standard across all Charter Schools, and are in alignment with the approved Charter Schools in Marin County.</p>
2a	<p>Please explain how a student will be provided timely, written notice of the charges and an explanation of student's basic rights.</p> <p>Petition has complied with all legal and Ed Code affirmations and meets the FCMAT requirements for this question. Specifically read the affirmations at the beginning of the section of this element to answer your question (starting page 142 of the petition).</p>
2b	<p><i>Please provide clarity/information</i></p> <p>This is on page 160 of the petition</p>

Section M: Post-employment Rights of Employees

2	<p><i>Will the collective bargaining contracts of the charter authorizer be controlling documents?</i></p> <p>No</p>
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Community Impact

1	<p><i>Please describe the enrollment area of focus for your outreach.</i></p> <p>We will welcome all students interested in the Charter School, but focused primarily on Southern Novato. The Charter School explains how it will serve Community Interests (page 11 of petition), Community Need (page 20), and Student Demographic (page 19). We recommend reading throughout Element 1, and understand that the Charter School is seeking to complement current NUSD offerings, and add value to the community. (Please see Prop 39 letter dated 11/1/22, which identifies comparison schools and enrollment area, pages 4-6).</p>
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FINANCIAL SOLVENCY

The Charter School in alignment with other establishment (new) charter schools and is a solvent organization. Please find our response to your claim of insolvency, which is incorrect.

Budget Risks to Revenues

If the UPP is less than the budgeted 63%, and less than 55% to be eligible for SB 740 funding, the school may need to make cuts and adjustments. These cuts could potentially include cutting the Kindergarten paraeducator, reducing the Counselor, reducing After School tutors, marginal cuts would be made to items like curriculum and instructional materials, supplies, books, computers/equipment, furniture, Chromebooks could be reduced for TK and K grades, PD Consultants could be cut or reduced. Budgets are living documents that need to be revised as things change throughout the year. Charter schools are fortunate to have the flexibility to make adjustments to their budgets as needed and can be creative in their efforts to do so.

Furthermore, the school is confident in the projected enrollment and will recruit in neighborhoods in areas with the targeted demographics. If the school does not have 55% low-income students, the school may have a Prop 39 co-location facility as an option which would reduce facility rent and related expenses. The school may also be able to find a less expensive facility. Or if the school is located in the attendance area of an elementary school that has 55% UPP, it is eligible for the SB 740 funding too.

The budgeted calculation for ELOP is described in the question responses. A much lower conservative rate (compared to the current funding rate) of \$1,250/prior year UPP ADA is used for ELOP funding in Year 2. In addition, the minimum grant amount for ELOP is \$50,000.

Budget Risks to Expenses

The costs for curriculum, furniture, computers, equipment, professional development and more are all based on known expenses for these specific items and programs, or estimates based on other typical new charter schools. Based on ExED's experience with budgeting and supporting the opening of charter schools, these costs are not underestimated. Costs for charter schools

are not necessarily the same as the costs for district public schools as they have greater flexibility to find the supplies, equipment, and programs that they need. This is true for facilities as well, and the school has based the rent expense on possible sites identified in the area. If nutrition expense are higher, the associated reimbursement for these costs will also be higher, offsetting the expenses and creating no net impact on the budget. ELOP budgeted expenses are based on serving students per the ELOP requirements and are not understated. Special Education expenses are equivalent to \$1,250 per student (all pupils) which is in line with the average spending at charter schools, though may vary depending upon the actual student population and needs. Expenses include an outsourced part-time special education teacher, outsourced 3rd party services for all other needs, a portion of the counselor time for case management, and a portion of the School Director for oversight of Special Education.

Finally, the budget surplus of \$100,094 or 7.6% of the budget, in Year 1 provides a significant cushion for additional expenses, lower enrollment, or other needs. The governor's proposed budget also is likely to have a COLA higher than what was budgeted, which would provide an additional \$30K in Year 1. In addition, the budget includes no unsecured but likely private and public grants, including the PCSGP, Revolving Loan, and private grants that the school has applied for through the Silicon Schools Fund and New Schools Venture Fund (\$200,000).

In conclusion, the potential downside from lower enrollment or low-income percent is low risk due to the assessment of student demand and targeted recruitment in the areas with lower income, and revenue is more likely to be higher due to the state budget and likely potential grants. Expenses are based on actual or typical expenses for new charter schools and are not understated. The budget has a significant cushion to manage some variation in expenses and enrollment.

From: [Healy School](#)
To: [Janelle Campbell](#)
Cc: [John Carroll](#)
Subject: Ad Hoc Committee Meeting Questions/Responses
Date: Wednesday, February 22, 2023 1:23:28 PM
Attachments: [Healy School FCMAT MCOE Review Questions 2 22 23.pdf](#)

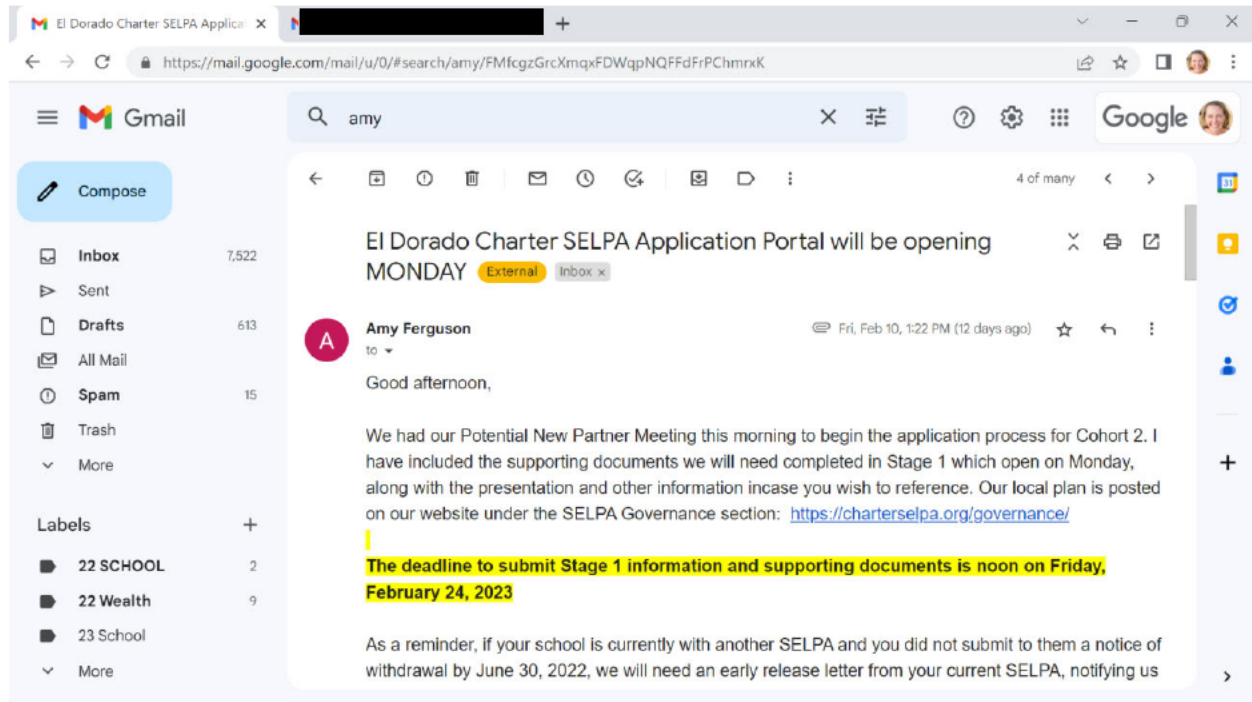
Hi Janelle -

As promised, here is a write-up from the reviewer questions that arose in last week's Ad Hoc Committee meeting (additional attachments forthcoming).

Please don't hesitate to reach out if you have any additional questions.

Thank you,
Maureen Healy
415-320-1063

SELPA Coordinator (screenshot)



Amanda Ferstl

From: Healy School <healyschoolinc@gmail.com>
Sent: Sunday, February 26, 2023 8:14 AM
To: Janelle Campbell
Subject: Re: Ad Hoc Committee Meeting Questions/Responses

Hi Janelle -

Thanks for the question. We didn't get an application confirmation from El Dorado Charter Selpa by email, but I can ask for one from Amy Ferguson on Monday, our contact [REDACTED]. When I get confirmation, I'll send it to you.

Thanks,
Maureen

This is our application in the El Dorado Charter Selpa portal:

The screenshot shows a web browser window with the URL <https://edcoe.my.site.com/EDCOE/s/selpaapplication?id=a2531000002AJEMEA0>. The page header features the El Dorado Charter SELPA logo and a navigation menu with links: Home, Organizations, Contacts, Selpa Application, and Review. A user profile for Maureen Healy is visible in the top right. The main content area displays application details in a two-column table:

Selpa Application Name	Responsible Party
Healy School 2022-23 Application	Maureen Healy
Record Type ID	Briefly Describe Your Role at the School
Non Expansion New School Non-Virtual Application	
Organization	CEO
Healy School	Maureen Healy
Site Type	
Site-based Instruction	

On Sat, Feb 25, 2023 at 1:32 PM Janelle Campbell <jcampbell@marinschools.org> wrote:

Hi Maureen,

We have reviewed the attached screenshot from El Dorado. Are you able to send evidence that the Charter has applied to the SELPA?

Thanks,

Janelle

From: Healy School <healyschoolinc@gmail.com>
Sent: Saturday, February 25, 2023 10:58 AM
To: Janelle Campbell <jcampbell@marinschools.org>
Subject: Re: Ad Hoc Committee Meeting Questions/Responses

Hi Janelle -

There are no additional attachments. We submitted the Selpa screenshot, and Finance response in the back of the PDF.

Thanks,
Maureen

On Fri, Feb 24, 2023 at 1:33 PM Janelle Campbell <jcampbell@marinschools.org> wrote:

Hi Maureen,

I am following up to see if you will be sending additional attachments.

Best,

Janelle

From: Janelle Campbell
Sent: Wednesday, February 22, 2023 3:26 PM
To: Healy School <healyschoolinc@gmail.com>
Cc: John Carroll <jcarroll@marinschools.org>
Subject: RE: Ad Hoc Committee Meeting Questions/Responses

Hi Maureen,

Confirming receipt of these responses. We appreciate the work to gather this clarifying information.

-Janelle

From: Healy School <healyschoolinc@gmail.com>
Sent: Wednesday, February 22, 2023 1:23 PM
To: Janelle Campbell <jcampbell@marinschools.org>
Cc: John Carroll <jcarroll@marinschools.org>
Subject: Ad Hoc Committee Meeting Questions/Responses

Hi Janelle -

As promised, here is a write-up from the reviewer questions that arose in last week's Ad Hoc Committee meeting (additional attachments forthcoming).

Please don't hesitate to reach out if you have any additional questions.

Thank you,
Maureen Healy
415-320-1063

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Appendix E:

Facilities Request



Delivery via hand
and e-mail

November 1, 2022

Dr. Jan la-Torre Derby
Superintendent
Novato Unified School District
1015 Seventh Street
Novato, CA 94945

RE: Request for Proposition 39 Facilities for the 2023-24 School Year

Dear Dr. Derby and NUSD Board of Trustees,

I am writing on behalf of the Healy School ("Charter School" or "HS") to request reasonably equivalent school facilities from the Novato Unified School District ("District" or "NUSD") pursuant to Education Code Section 47614 (i.e., Proposition 39) and Title 5 of the California Code of Regulations ("CCR") Section 11969.1 through 11969.11, as amended ("Implementing Regulations").

Proposition 39, passed by the voters of California on November 7, 2000, requires school districts to make available to each charter school operating within the school district, school facilities sufficient for each charter school to accommodate all of the charter school's in-district students in conditions reasonably equivalent to those in which the students would be accommodated if they were attending other public schools of the school district. Facilities provided shall be contiguous, furnished, and equipped, and shall remain the property of the school district. In addition, the school district must make reasonable efforts to provide the charter school with facilities near to where the charter school desires to be located. (See Education Code Section 47614(b)).

The Proposition 39 Implementing Regulations, adopted by the State Board of Education ("SBE") in 2002, and amended in 2008, require the Charter School to make an annual written request for facilities. Title 5 CCR Section 11969.9(c)(1) specifies the information that must be included in the annual facilities request. This request, along with the information submitted herewith, meets and exceeds the requirements of Education Code Section 47614 and the Implementing Regulations.

Projected Average Daily Attendance (ADA)

In accordance with Education Code Section 47614(b)(2), the District is required to allocate school facilities to the Charter School for the following school year based upon a projection of average daily classroom attendance provided by the Charter School.

The Charter School's Governing Board has determined that a reasonable projection of the Charter School's in-District average daily classroom attendance for the 2023-24 school year is 89.3. The following is a breakdown of the Charter School's projected average daily attendance ("ADA") as required by 5 CCR Section 11969.9(c)(1). The Charter School's ADA figures are based on the methodology outlined in the following section.

Please note:

- "Prior year" means the fiscal year prior to the year in which a facilities request is made. For this request, the prior year is 2021-22.¹
- "Current year" means the fiscal year in which a facilities request is made. For this request, the current year is 2022-23.
- "Request year" means the fiscal year for which facilities are being requested. For this request, the request year is 2023-24.

Table 1: Total ADA

A	D
Grade Level	<u>Projected Total</u> <u>Request Year</u>
TK	22.8
K	22.8
1	24.7
2	20.9
3	
4	
5	
Total	91.2

Healy School is projecting that TK, K and grade 1 will be the largest enrollment numbers as evidenced by how historically new schools open. Both California Charter Schools Association (CCSA) and Charter Schools Development Center (CSDC) as well as other school founders, administrators, and leaders in the field of opening new charter schools share the insight that schools typically open with larger early grades such as TK, K, and grade 1, thus we are estimating enrollment is lower in second grade. Many parents are hesitant to pull their students from their elementary schools unless a specific reason was

identified and the student needed a change (for example, they need a new environment, a different academic program or schedule, the appeal of a resilience studies program, and so on).

Table 2: Total In-District ADA

A	D
Grade Level	<u>Projected Total</u> <u>Request Year</u>
TK	22.8
K	22.8
1	23.75
2	19.95
3	
4	
5	
Total	89.3

Healy School didn't receive any out-of-district 'meaningful interest' forms, but projected two slots for out-of-district students (one in grade 1, and one in grade 2). If we receive any out-of-district 'meaningful interest' forms, we will update the district, and share all updated forms post November 1, 2022.

Table 3: Total Classroom ADA

A	D
Grade Level	<u>Projected Total</u> <u>Request Year</u>
TK	22.8
K	22.8
1	24.7
2	20.9
3	
4	
5	
Total	91.2

Table 4: Total In-District Classroom ADA

A	D
Grade Level	<u>Projected Total</u> <u>Request Year</u>
TK	22.8
K	22.8
1	23.75
2	19.95
3	
4	
5	
Total	89.3

The following tables represent the projected total Request Year in-District ADA (from Table 2 above) and the projected total Request Year in-District classroom ADA (from Table 4 above) broken down by grade level and the school in the District the pupils are otherwise eligible to attend. (5 CCR Section 11969.9(c)(2).)

Table 5: In-District ADA Broken Down by Grade Level and District Schools Where Pupils Would Otherwise Attend:

School Name/Grade		TK	K	1	2	3	4	5
Hamilton K-8 School		7.6	9.5	9.5	6.65			
Lynwood Elementary		5.7	1.9	1.9	1.9			
Lu Sutton Elementary			1.9	1.9	1.9			
Private School (non-public)		.95		.95	1.9			
Homeschool (non-public)					.95			
Ross Valley Charter					.95			
Miwok Valley Elementary Charter School (Petaluma)		.95			.95			
Olive Elementary			.95	.95				
Pleasant Valley			.95	.95				

San Ramon Elementary					.95			
Loma Verde Elementary		7.6	7.6	7.6	3.8			
TOTAL		22.8	22.8	23.75	19.9			

Healy School team members repeatedly heard from parents/guardians that they weren't able to "get into" Novato Charter School, and due to that situation placed their child(ren) into their local public elementary school in NUSD. This piece of information isn't captured above, but reflects that some NUSD parents are interested in another school choice.

Healy School genuinely believes that not every school is for every child, and by offering another school choice we can complement the District and contribute to NUSD's success.

Table 6: In-District Classroom ADA Broken Down by Grade Level and District Schools Where Pupils Would Otherwise Attend:

School Name/Grade		TK	K	1	2	3	4	5
Hamilton K-8 School		7.6	9.5	9.5	6.65			
Lynwood Elementary		5.7	1.9	1.9	1.9			
Lu Sutton Elementary			1.9	1.9	1.9			
Private School (non-public)		.95		.95	1.9			
Homeschool (non-public)					.95			
Ross Valley Charter					.95			
Miwok Valley Elementary Charter School (Petaluma)		.95			.95			
Olive Elementary			.95	.95				
Pleasant Valley			.95	.95				
San Ramon Elementary					.95			
Loma Verde Elementary		7.6	7.6	7.6	3.8			

TOTAL		22.8	22.8	23.75	19.9			
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Table 7: In-District Students Broken Down by Grade Level and District Schools Where Pupils Would Otherwise Attend:

School Name/Grade		TK	K	1	2	3	4	5
Hamilton K-8 School		8	10	10	7			
Lynwood Elementary		6	2	2	2			
Lu Sutton Elementary			2	2	2			
Private School (non-public)		1		1	2			
Homeschool (non-public)					1			
Ross Valley Charter					1			
Miwok Valley Elementary Charter School (Petaluma)		1			1			
Olive Elementary			1	1				
Pleasant Valley			1	1				
San Ramon Elementary					1			
Loma Verde Elementary		8	8	8	4			
TOTAL		24	24	25	21			

Methodology Used In Making ADA Projection:

Title 5 CCR Section 11969.9(c)(1)(B) requires the facilities request to include a description of the methodology for the ADA projections.

Healy School utilized the following methodology for calculating ADA projections, and utilized an ADA of 95% to be reflective of the current NUSD student population, as well as other charter school student populations. Our rationale is that our future students will most likely be similar to the current NUSD student population, which averages an 95.19% attendance rate from eleven

schools serving the elementary school population in NUSD. This is based on the most recent report dated April 19, 2022, and posted on the Novato Unified School District's website.

Looking at exclusively the two classroom-based charter schools in Marin County: Novato Charter School in Novato per report mentioned (97.28% attendance rate) and Ross Valley Charter (93.7% SY22 attendance rate) and (95.8% SY21 attendance rate) the average remains at 95.59%. Of course, we would like to utilize the most recent information from each school, however it was difficult to find Ross Valley Charter's latest ADA, which prompted us to utilize their board reporting of ADA.

1. **Alignment with NUSD Average Daily Attendance (ADA)** per this graph as posted on the NUSD website sharing Novato Unified School District's ADA from 8/17/22 to 4/19/22. Elementary schools in comparison include Hamilton Meadow Park (95%), Rancho Elementary (96.03%), Loma Verde Elementary (95%) Lu Sutton Elementary School (94%), Lynwood Elementary School (93.89%), Olive Elementary (95.10%), Pleasant Valley (95.70%), San Ramon Elementary (94.33%), Nova Education (95.78%) and Novato Charter School (97.28%). The average is 95.19%.

1 of 1

Novato Unified School District				
2021-2022	Average Daily Attendance (ADA) Summary			4/19/2022
8/17/2021 - 4/19/2022				
School	Average Daily Enrollment	Average Daily Attendance	Average Daily Absences	ADA %
Non Public Schools	41.43	41.43	0.00	100.00%
Novato Early Intervention	69.99	69.99	0.00	100.00%
Hamilton Meadow Park (TK-5)	343.09	325.93	17.16	95.00%
Hamilton Meadow Park (6-8)	170.72	162.14	8.59	94.97%
Rancho Elementary	353.06	339.03	14.03	96.03%
Loma Verde Elementary	395.84	376.91	18.93	95.22%
Lu Sutton Elementary	334.85	315.23	19.61	94.14%
Lynwood Elementary	254.58	239.03	15.55	93.89%
Olive Elementary	339.06	322.46	16.61	95.10%
Pleasant Valley	389.77	373.02	16.74	95.70%
San Ramon Elementary	414.17	390.66	23.49	94.33%
Nova Education Center TK-5	64.41	61.69	2.72	95.78%
Novato Charter School	265.80	258.57	7.22	97.28%
San Jose Intermediate	557.32	525.50	31.82	94.29%
Sinaloa Middle	773.14	731.14	42.01	94.57%
Nova Education Center	103.91	98.79	5.12	95.07%
Novato Unified Home Instruction	5.71	5.71	0.00	100.00%
Novato High	1443.43	1361.18	82.26	94.30%
San Marin High	1127.56	1077.14	50.42	95.53%
Marin Oaks High	66.32	60.08	6.24	90.59%

Note: Detail may not add up to the totals due to truncation of detail numbers

2. **Charter School's ADA in Marin County:** Novato Charter School has an ADA of 97.28% from the graph above (Novato, CA) and Ross Valley Charter has an ADA of 93.7% (SY 21-22) and 95.8% (SY 20-21) per board documents (<https://bit.ly/3CSfQVL>). These are the only two classroom-based (independent) charter schools in Marin County, and the closest comparison schools for ADA projections for Healy School in the 2023-2024 school year.

The Healy School will not offer any non-classroom based program, and thus assumed all of its ADA will be classroom-based.

Methodology for 'Meaningful Interest' forms

Most of 'Meaningful Interest' forms were collected door-to-door in the month of October 2022 and are included for the completion of this Prop 39 application. Signatures come from in-district parents and/or guardians meaningfully interested in sending their children to Healy School beginning in the school year 2023-2024 (SY 24), after parents were able to review the charter petition, discuss the school with the Healy School team, and ask any questions. The school is expected to open with grades TK-grade 2 (having four classrooms) and only accepted meaningfully interested forms from parents whose children can attend those grades in 2023-24.

Our lead petitioner, Maureen Healy, doesn't speak Spanish and a few of the forms are in Spanish so she went door-to-door with a Spanish speaking volunteer to gather forms. Healyschool.org – the website for the school, is in English but also has a button on the lower left to translate into Spanish. Information on the website is accessible to Spanish speaking individuals. Healy School's charter petition was provided to everyone who signed a meaningful interest form, and every parent/guardian was given access to a Spanish translator if they needed one.

Healy School's website (healyschool.org) has been collecting additional interest forms online, however we haven't asked for exact addresses – only zip codes, which tells a limited story of location therefore the unverified forms haven't been included in this application process. We are updating our online interest form, and will be requesting parents/guardians to resubmit their 'meaningful interest' forms online or hardcopy (with exact addresses, and the school the student would otherwise attend – for example, public, private, or homeschool) and will share those forms with the District.

Healy School petitioners have also been hosting in-person (Sam's Place in Novato, Margaret Todd Senior Center, Private Homes) and online meetings (Zoom, Google Meets) to share our educational program with our community. Our aim has been to answer questions, listen deeply to what our community needs, and partner with parents and educators to deliver the highest quality education that can fulfill a need in our community. Such meetings were largely informational, and conversational to share information. Once the website was launched in early 2022, the Healy School team began gathering online 'meaningful interest' forms.

All of our meetings with the Novato community were public, and inclusive. We had a Spanish translator at each meeting, and opened the meetings to anyone in the public whether you had a student entering elementary school or were an interested community member – all were welcome. We received growing interest from parents sending children to private schools, families who homeschool, and others looking for alternative public education, which is tuition-free.

Additionally, we have partnered with community organizations such as North Marin Community Services to distribute information, and 'meaningful interest' forms in English and Spanish to their community of parents. Our aim is to be a trusted partner with varying community organizations (for example, daycare, religious, YMCA) to share our program, and fulfill a need in our community to benefit families and students.

Meaningfully interested families were provided a copy of the charter petition, and had access to updates to the charter through e-mail, phone calls, and meetings. The challenges of the COVID-19 pandemic made some families reticent in gathering, however online information distribution was consistent for anyone expressing interest. The Charter School would also follow-up with a phone call to the parent and/or guardian to ensure all questions were answered, and up-to-date information provided.

Assumptions and Rationale

Healy School is providing the District with 48 'meaningful interest' forms to demonstrate interest from parents/guardians, and need for a facility within NUSD. Given the charter school hasn't yet begun operations and doesn't yet have its charter approved, the fact we could collect 'meaningful interest' forms supporting 50% of its projected in-district ADA at this very early date, almost ten (10) months before the start of the school year, demonstrates that its projections are reasonable and conservative.

In addition, the Charter School has a substantial recruitment and enrollment process planned for the next several months, and given the success of its efforts so far, it will be invariably receiving many more interest forms through this on-going process. Interested parents and guardians are reaching out every day, and learning more about this program. The "word of mouth" is building throughout the Novato Community, and our team is receiving support from many community members and groups supporting the resilience studies program, and the mission to create a new elementary school where all feel welcome.

Healy School's projections are reasonable because it was able to collect 'meaningful interest' forms without an established program or facility or history, and facing the challenges of collecting forms during the COVID-19 pandemic. There are many Novato households that remain vigilant against COVID-19 virus, and have immunocompromised individuals, which limited the opportunities for traditional outreach efforts – and since we did collect forms, we are clearly showing that the Charter School is an interesting and appealing choice in the community.

Furthermore, this is before Healy School has initiated the majority and most significant of our recruitment efforts, which shows that the school's enrollment projections are very attainable and reasonable, as it will continue to identify and sign-up families who are meaningfully interested in enrolling their child(ren) at Healy School. We will continue to collect 'meaningful interest' forms after the Prop. 39 deadline, and thus the Charter School will continue to receive indications of meaningful interest long after November 1st. We will continue to provide the District with updates on the forms we collect from families during this time.

Additionally, the Charter School is planning for our enrollment period to begin in March 2023, and the fact we could obtain 48 'meaningful interest' forms 5 months prior to the start of its formal enrollment period demonstrates parent/guardian and student interest in Healy School.

Supporting Documentation

Title 5 CCR Section 11969.9(c)(1)(C) requires the facilities request to include supporting documentation. The Implementing Regulations state that when a charter school is not yet open (i.e., not yet providing instruction) or to the extent an operating charter school projects a substantial increase in in-District ADA, the annual request must include documentation of the number of in-District students meaningfully interested in attending the Charter School. Please be advised that Healy School is not yet open, we have attached and incorporated herein by reference the following supporting documentation that fully substantiates the reasonableness of our in-District ADA projections for the 2023-2024 school year:

- 48 Signed parental "Meaningful Interest" Forms for all students for the 2023-24 request year
- ADA from NUSD per their website
<https://nUSD.org/wp-content/uploads/2022/05/Average-Daily-Attendance-Summary-4.19.22.pdf>
- ADA from Ross Valley Charter Board Meetings
<https://bit.ly/3CSfQVL>
- Novato's Enrollment Jump
<https://www.marinij.com/2022/08/10/novato-school-district-reports-robust-enrollment-jump/>

As you review the Charter School's ADA projections and supporting documentation, please keep in mind that the Proposition 39 regulations do not specify or require a particular type of supporting documentation to be used. Charter Schools may submit any type of supporting documentation which they used to arrive at their ADA projections. This documentation must be "sufficient for the district to determine the reasonableness of the projection, but ... need not be verifiable for precise arithmetical accuracy." (Section 11969.9(c)(1)(C).) The supporting documentation is intended only to demonstrate reasonableness of Charter School's request, not mathematical exactitude, and need not be independently verified by the District. Indeed, there have been cases where Districts have actively contacted parents to corroborate or discount the evidence provided by the Charter School. Courts have found such actions to be improper and abusive, and the District should be aware that the use of such tactics may expose the District to liability for violating legal limits on the District's authority to "determine the reasonableness" of the Charter School's projection. The Regulations do not authorize the District to audit the

documentation provided by the Charter School or discount evidence which cannot be independently confirmed by the District. However, should the District desire additional documentation or information regarding the Charter School's ADA projections, please contact me as soon as possible. We remain willing to cooperate with the District to immediately address any questions or concerns about this request and the supporting documentation.

Outreach and Recruitment Plan

The Charter School will continue its focused outreach and recruitment initiatives in the District after the submission of the Prop. 39 request. Healy School, in partnership with local community organizations will utilize various outreach methods to connect with students and families from all backgrounds.

We recognize the challenges of recruiting students and families to a new school. We also acknowledge that charter schools are relatively unfamiliar to many families in the area and that the recruitment process is one of informing parents about their various choices. Healy School will continue to utilize multiple methodologies to reach interested parents/guardians throughout the District, and share information countywide.

Specifically, Healy School will use a variety of strategies to try and achieve a racially and ethnically diverse student population, including but not limited to the following:

- Community Meetings (online and in-person): Several times over the next year, Healy School will host in-person meetings, as well as online programs. We want to answer questions, share the latest information, and give parents/guardians as well as students an opportunity to ask questions, better understand the curriculum, and opportunities provided by the Charter School.
- Community Groups – Healy School team will continue to connect with local organizations such as North Bay Children's Center, YMCA, Novato's Mother's Club, Hamilton Mother's Club, Rotary Club, and other specialized community groups (for example, religious, preschool cooperatives, daycares) to share information, answer questions, and explain the opportunities provided by the Charter School.
- Media – This is one of the most effective methodologies to communicate with an educated population of parents/guardians in Novato, and Marin County. Healy School will use the experience and relationships of its team members to strategically place articles in local newspapers. The subject of focus could include the innovative program offered by Healy School. The Charter School will continue to work with the various online, and print papers in Novato, California, as well as Marin County.
- Digital Media – Healy School will update and maintain its website with the latest enrollment information and make all application materials in English and Spanish.
- Social Media – Healy School will create a social media program including Facebook and other websites. Once the school opens, we will use these channels to communicate with families and interested community members, as well as share outreach and recruitment materials and processes.

- Collateral Materials/Leave Behinds – Healy School will continue to have brochures, and flyers in English and Spanish for interested families. Many families want to read about the program, and come to ask questions afterwards, as well as attend upcoming meetings (online and in-person). These materials will be designed to demonstrate the diversity and cultural appreciation that will be at our school.

Operational Calendar:

Title 5 CCR Section 11969.9(c)(1)(D) requires the facilities request to include the Charter School's operational calendar. The Charter School's operational calendar is attached for your review. The Charter School's first day of instruction is on Monday, August 15, 2023, therefore we will need access to the facility on or before July 1, 2023, in order to prepare. Please note that Title 5 CCR Section 11969.9(j) requires the District to ensure that a furnished and equipped facility meeting the requirement of Proposition 39 be made available to the Charter School no less than ten (10) working days prior to the charter school's first day of instruction. In addition, in accordance with Section 11969.5, the space allocated must be made available for the Charter School's entire school year regardless of the School District's instructional year or class schedule.

Healy School 2023-2024 – Important Dates

Staff Development Days	July 31 st – August 11 th (10 PD Days)
Teacher Workday	August 14, 2023
First Day of School	August 15, 2023
Labor Day	Monday, September 4, 2023
Minimum Day	Tuesday, October 31, 2023
Veterans Day	Friday, November 10, 2023
Parent Conferences	November 13-17 th
Thanksgiving Break	November 20-24 th
Winter Break	December 18 th – January 2 nd
MLK Day	Monday, January 15 th , 2024
Staff Development Day	Tuesday, January 16 th , 2024
President's Day	Monday, February 19, 2024
Mid-Winter Break	February 19 th – February 23 rd , 2024
Spring Break	April 8 th – 12 th 2024
Non-School Day	Friday, May 24, 2024
Memorial Day	Monday, May 27, 2024
Last Day of School	Friday, June 7, 2024
Teacher Workday	Monday, June 10, 2024
Intersession	June 1, 2024 – July 31, 2024

Educational Program:

Title 5 CCR Section 11969.9(c)(1)(F) requires the facilities request to provide information regarding the charter school's educational program that is relevant to the assignment of facilities. The Charter School's educational program has unique features, and standard elementary school facility's needs. As you are aware, key components of the educational program of the Charter School include:

- Resilience Studies Program – Students will be taught the science of resilience, and how to develop the evidence-based skills of resilience in a “Smart and Strong” class four times per week. We expect to have ample sized classrooms, which will be effective in teaching students and sharing about resilience from a multi-media perspective (for example, videos, models of the brain, white boards, listening to audio recordings, etc.). Students will be engaged both logically, and emotionally to develop, maintain, and repair resilience in the classroom and outside of it.
- After-school programming – Students will be given access to after-school tutors, which lessen their stress. Learning how to reduce stressors, and cope with challenges builds resilience. Offering after-tutoring, and programming needs space with outside tables, canopies for shade, and inside space for inclement weather. Additional outdoor space for after-school programming run by Healy School would ideally have recreation capabilities: a playground, outdoor field (for soccer), and space with a basketball court.
- Advisory class – Students get a chance to “catch up” on their schoolwork, and complete their daily reading assignment (20 minutes). This is also a time during the school day where many students may help each other, and work together on group projects. We expect the facilities including furniture to have that capability, and at a minimum several circular tables with chairs to facilitate groupwork.
- Honors multiple intelligences – Howard Gardner's multiple intelligence theory identifies different types of learners, such as those with a “primary intelligence” of musical, spatial, kinesthetic, linguistic, or logical/mathematical, as examples. Encouraging students to connect with their primary intelligence, and build on their strengths is supported by having facilities to encourage them such as: a Library (linguistic), Art and Music room (spatial and music) and gym/outdoor space (kinesthetic). Healy School deeply believes in honoring students multiple intelligences, and helping them build on their innate intelligence to develop academically and socially.
- Culture of Resilience – We are intent in nurturing healthy connections and supportive relationships between students, teachers, families, and administration. To this end, we would expect to have a large meeting room or gymnasium where schoolwide events could be conducted and we could host events such as a Science Fair, Parent Enrichment Programming, and Resilience Education, for faculty and the community.
- Culture of Diversity – One of our core commitments is that of inclusivity, equity, and a celebration of diversity (visible and invisible). We want all students to feel welcome, seen, and celebrated. Healy School team will focus on hiring diverse candidates, and we expect our physical facility to have space – on the walls, and in common rooms, as well as teaching stations (i.e., classrooms) to display our celebration of all peoples, but especially leaders of color and racial diversity.

Healy School team requests that our facilities for the 2023-2024 school year (SY24) include, but not be limited to:

- Teaching stations (classrooms) – 4 for the SY 2023-2024
- Special Education Room – 1
- Lunchroom – 1
- Faculty Room – 1
- Office and Administration – 2 Rooms with lobby, and check-in area
- Counseling Room – 1
- Outdoor Space (for recess)
- Storage Closet
- Technology or Secure Computer Lock-Up Area

Teaching stations need to be equipped with basic equipment for science classes, art programming, and audio visual instruction. Reasonably equivalent equipment provided for other NUSD elementary school students are requested.

Additional required space includes:

- Space for gardening
- Art and Music Room
- Science Lab
- Room for a Library

Healy School would request ample parking spaces, and a location with easy drop-off, as well as pick-up of elementary school students.

As mentioned, the Charter School will also operate an after-school program throughout the school year that must be accommodated. This would include at a minimum: Four (4) classrooms, outdoor space, a lunchroom, special education room, and administrative office space.

During intersession, Healy School will run a “summer session” with enrichment classes for a full day of school for six weeks (June and July). During intersession, Healy School would need full use of the facilities to operate summer enrichment programs.

This list is a floor of the amounts and kinds of space Healy School anticipates for the 2023-24 school year. However, if the District’s comparison schools provide for more or additional amounts and kinds of spaces than are listed here, Healy School anticipates the District will comply with its legal obligations and provide access to reasonably equivalent kinds and amounts of these spaces.

In addition, and in accordance with its charter and its budget, the Charter School will operate grade levels TK through 5 on one contiguous school site. In school year 2023-2024, we

are planning to open with grades TK, K, 1 and 2 in one single location. We are not a large school, and to appropriately form the culture of resilience, and to effectively implement the teachings of the “Smart and Strong” classes, we need to have one contiguous site. Therefore, Healy School’s educational program requires a single contiguous school site in which to operate.

Facility Location:

Title 5 CCR Section 11969.9(c)(1)(E) requires the Charter School to provide information regarding the District school site and/or general geographic area in which the Charter School wishes to locate. Based upon the needs of Healy School and the residency of the projected student enrollment, the Charter School desires to locate its facility in Southern Novato to help ease parents and/or guardians commute (many will go on the 101 North and 101 South) to work.

While we are requesting a facility in Southern Novato to serve the families and students that are interested in attending Healy School, we are open to negotiating a space that fits your needs and the needs of our educational program. Ideally, our program would be located in a facility that would allow us to grow over the next 3-5 years, which includes adding a grade level (and classroom) each year as well as expanding current grade levels (and adding classrooms for early grades such as TK, K, 1 and 2, as needed).

Healy School is asking for a “turnkey solution” for an elementary school for the 23-24 school year, which includes minimal repair or investment. This would be a facility that is already “up to code” and is ready to be utilized as an elementary school, which is comparable to other NUSD elementary schools with video cameras, and all of the modern upgrades that have occurred in recent times, and are planned for comparable NUSD schools. Please note that the District is required by Prop. 39 to provide space to Healy School that complies with all applicable laws. (5 CCR Section 11969.9)

Healy School recognizes that NUSD owns multiple buildings, and at least one parcel we are aware of that is undeveloped. We hope to come to a mutual agreement with NUSD to serve our students and families in the most seamless way possible.

Procedures and Timelines:

In accordance with the Implementing Regulations, the District is required to review the Charter School’s attendance projections and to express any objections that it has about the Charter School’s attendance projections in writing on or before December 1, 2022. The Charter School must respond to the District’s written objections, if any, on or before January 2, 2023, and will either reaffirm or modify its projections as it deems necessary. (5 CCR Section 11969.9(d).)

Furthermore, we look forward to receiving a written preliminary facilities proposal from the District on or before February 1, 2023, as required under the Implementing Regulations. (5 CCR Section 11969.9(f).) The preliminary proposal must include, at a minimum, the following information: (1) a breakdown of the number of teaching stations (classrooms), specialized and

non-classroom based space to be allocated to the Charter School, with an indication as to whether the space is exclusive or shared use; (2) the projections of in-District classroom ADA on which the proposal is based; (3) the specific location of the space; (4) all conditions pertaining to the space, including a draft of any proposed agreement pertaining to the Charter School's use of the space, (typically referred to as a facilities use agreement); (5) the projected pro rata share amount and a description of the methodology used to determine that amount; and (6) a list and description of the comparison group schools used in developing its preliminary proposal, and a description of the differences between the preliminary proposal and the Charter School's facilities request. In accordance with the Implementing Regulations (5 CCR Section 11969.2(d)), if the District's preliminary proposal (or final notification) does not accommodate Charter School at a single school site, the District's governing board must first make a finding that the Charter School could not be accommodated at a single site and adopt a written statement of reasons explaining the finding. The Charter School has until March 1, 2023, to respond to the preliminary proposal, expressing any concerns, addressing differences between the preliminary proposal and the facilities request, and/or making counter proposals.

Section 11969.9(h) of the Implementing Regulations requires the District to provide a written final notification regarding the space to be allocated to the Charter School prior to April 1, 2023. The final notification specifically must include, at a minimum, the following:

- (1) The teaching station, specialized classroom space, and non-teaching station space offered for the exclusive use of the charter school and the teaching station, specialized classroom space, and non-teaching station space which the charter is to be provided access on a shared basis with District operated programs, if any;
- (2) For shared space, if any, the proposed arrangements for sharing;
- (3) The in-District classroom ADA assumptions for the Charter School upon which the allocation is based and, if the assumptions are different than those submitted by the charter school, a written explanation of the reasons for the differences;
- (4) The specific location of the space;
- (5) All conditions pertaining to the Charter School's use of the space;
- (6) The pro rata share amount and a description of the methodology used to determine that amount;
- (7) The payment schedule for the pro rata share amount, which shall take into account the timing of revenues from the state and from local property taxes; and
- (8) A response to the Charter School's concerns and/or counter-proposals, if any.

A California Court of Appeals decision has made clear that, in meeting their Proposition 39 obligation, school districts must give the same degree of consideration to the needs of charter school students as it does to the students in district-run schools. The court noted that "accommodating a charter school might involve moving district-operated programs or changing attendance areas" and that providing a contiguous school facility to a charter school might require disruption and dislocation among district students, staff and programs. (*Ridgecrest Charter School v. Sierra Sands Unified School District* (2005) 130 Cal.App.4th 986.) In addition, the Court concluded that a school district responding to a request for facilities must issue a statement of

reasons at the time it makes its final determination that is "thorough" and "factual" enough to permit "effective review by the courts"; the statement of reasons issued by the school district must demonstrate that the district has "adequately considered all relevant factors" and that the district can "demonstrate a rational connection between those factors, the choice made, and the purposes of [Proposition 39]." Furthermore, as the District may be aware, two court cases clarified the manner in which a school district must allocate facilities to a charter school. Specifically, *Bullis Charter School v. Los Altos School District* (2011) 200 Cal.App.4th 1022, among other things, requires the District to perform a calculation of the square footage of all of the specialized and non-teaching station spaces at the comparison schools. The District must base its allocation of space to the Charter School on this analysis. In addition, the California Supreme Court has stated that a school district may not use its internal "norming ratios," or student-teacher ratios, in determining the number of classrooms to offer to charter schools but rather must use the facilities inventory at the comparison group schools to perform the teaching station to ADA analysis required by the Implementing Regulations. (*California Charter Schools Assn. v. Los Angeles Unified School District* (2015) 154 Cal.Rptr.3d 889.)

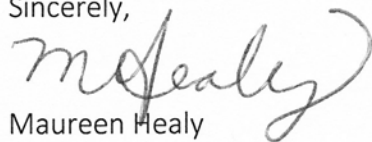
Although Proposition 39 requires the District to allocate a school facility for Charter School use, the Charter School is amenable to discussing alternative facilities arrangements that meet both the needs of the District and the Charter School.

The Charter School's Governing Board has delegated to me the responsibility to negotiate the allocation of a facility under Proposition 39. All communications regarding this matter should be sent to my attention at the email address below with a copy to my legal counsel, Sarah Kollman, at skollman@mycharterlaw.com.

Maureen Healy
Novato CA 94945
healyschoolinc@gmail.com
415-320-1063

I appreciate your time and consideration of this request and I look forward to developing a mutually agreeable plan to meet the facilities needs of Healy School's in-District students.

Sincerely,



Maureen Healy
Lead Petitioner

cc: Sarah Kollman, JD

Legal Counsel

Attached
48 Meaningful Interest Forms

Healy School
Meaningful Interest Form
for purposes of requesting facilities

Dear Parent or Guardian,

Under California law (i.e., Proposition 39) NUSD must provide Healy School reasonably equivalent school facilities in which to operate the charter school. This Form may be used to support the Charter School's request for facilities. By submitting this Form, you are indicating that you are meaningfully interested in enrolling or re-enrolling (as applicable) your child/children in the Charter School's classroom-based program during the 2023-24 school year. Thank you very much for your support and cooperation!

Information

Student Name: [REDACTED] Last, First, Middle	Grade in 2023-24: <u>2</u> TK, K, 1, 2,
Home Address: [REDACTED] Street City, State Zip	
Home Phone: [REDACTED]	of Student: <u>6</u> Date of Birth of Student: [REDACTED]
Current Charter School student? Y/N (circle one) <u>Y</u>	
Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>Y</u>	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Ross Valley Charter</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED] Last, First, Middle	
Home Address: [REDACTED] Street City, State Zip	
Home Phone: [REDACTED]	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: 10/30/22
IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-920-1063

Healy School
Meaningful Interest Form
for purposes of requesting facilities

Dear Parent or Guardian,

Under California law (i.e., Proposition 39) NUSD must provide Healy School reasonably equivalent school facilities in which to operate the charter school. This Form may be used to support the Charter School's request for facilities. By submitting this Form, you are indicating that you are meaningfully interested in enrolling or re-enrolling (as applicable) your child/children in the Charter School's classroom-based program during the 2023-24 school year. Thank you very much for your support and cooperation!

Information

Student Name: [REDACTED]	Grade in 2023-24: <u>2</u> TK, K, 1, 2,
Last, First, Middle	
Home Address: [REDACTED]	
Street City, [REDACTED]	
Home Phone: [REDACTED]	Student: <u>8</u> Date of Birth of Student: [REDACTED]
Current Charter School student? Y/N (circle one) <u>N</u>	
Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>N</u>	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>La Sutter</u>	
Parent/Legal Guardian Information:	
Parent: [REDACTED]	
Last, First, Middle	
Home Address: <u>same</u>	
Street City, State Zip	
Home Phone: <u>same</u> Email: _____	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [REDACTED] Date: 10/24/22
IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
for purposes of requesting facilities

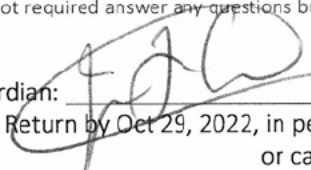
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Information

Student Name: [REDACTED] <small>Last, First, Middle</small>	Grade in 2023-24: <u>2</u> TK, K, 1, 2, <u>3</u>
Home Address: <u>same</u> <small>Street City, State Zip</small>	
Home Phone: <u>same</u>	Age of Student: <u>8</u> Date of Birth of Student: [REDACTED]
Current Charter School student? <u>(N)</u> (circle one)	
Resident of NUSD (Novato Unified School District)? <u>(N)</u> (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED]	
<small>Last, First, M</small>	
Home Address: [REDACTED] <small>Street City, State Zip</small>	
Home Phone: [REDACTED]	Email: _____

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: 

Date: 8/30/22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Documentación de interés significativo de los padres para inscribirse o reinscribirse
En apoyo de una solicitud para obtener instalaciones escolares

Estimado padre/tutor de actual o futuro estudiantes de la Healy School

Bajo la ley de California (Proposición 39) el Distrito Escolar de NUSD tiene que proveer a la Healy School instalaciones razonablemente equivalentes en donde se pueda operar la Healy School. Este formulario puede ser usado para apoyar la solicitud para instalaciones de la Healy School. Al devolver este formulario, usted está indicando que tiene un interés significativo de inscribir o reinscribir a su estudiante en el programa de chárter para el curso escolar 2023-24. ¡Gracias por su apoyo y su cooperación!

Información del Estudiantes:

Estudiante: [Redacted]	
Nombre: [Redacted]	Grado en el año 2023-24: <u>2nd</u> TK, K, 1, 2
Domicilio: [Redacted] Calle, Ciudad, Estado, Código Postal	
Teléfono de Casa: [Redacted]	Edad del Estudiante: <u>7</u> Fecha de Nacimiento: _____
¿Estudiante actual de Charter School? <u>No</u> (marque uno)	
¿Reside usted dentro de los límites del Distrito Escolar de NUSD? <u>No</u> (marque uno)	
Si contesto sí, por favor identifique la escuela dentro del distrito a la cual su estudiante de otra manera asistiría: <u>Hamilton</u>	
Nombre del padre o tutor legal: [Redacted] <small>Apellido, Primer Nombre, Segundo Nombre</small>	
Domicilio: [Redacted] C [Redacted]	
Teléfono de Casa: [Redacted]	Correo Electrónico: _____

Con mi firma, indico que tengo un interés significativo de inscribir o reinscribir al estudiante mencionado arriba en la Healy School para el curso escolar 2023-24. Entiendo que al firmar este formulario no garantiza matriculación en la Healy School. También entiendo que esta información será revelada al Distrito Escolar de NUSD (Novato Unified School District) para apoyar la solicitud de instalaciones bajo la Proposición 39 de la Healy School. Los distritos han hablado al los padres directamente para verificar su interés significativo. Yo entiendo que si el Distrito me habla, tengo el derecho de no contestar las preguntas, pero puedo confirmar que tengo interés significativo de inscribir o reinscribir mi hijo/hija en la Healy School. healyschooling@gmail.com or 415-320-1063

Firma del Padre o Tutor Legal: _____

Fecha: 10/27/22

Healy School
Meaningful Interest Form
for purposes of requesting facilities

Dear Parent or Guardian,

Under California law (i.e., Proposition 39) NUSD must provide Healy School reasonably equivalent school facilities in which to operate the charter school. This Form may be used to support the Charter School's request for facilities. By submitting this Form, you are indicating that you are meaningfully interested in enrolling or re-enrolling (as applicable) your child/children in the Charter School's classroom-based program during the 2023-24 school year. Thank you very much for your support and cooperation!

Student Information:

Name: [REDACTED] <small>Last, First, Middle</small>	Grade in 2023-24: <u>2</u> TK, K, 1, 2
Home Address: [REDACTED] <small>Street City, State Zip</small>	
Home Phone: [REDACTED]	Age: <u>8</u> Date of Birth: [REDACTED]
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Lu Su Hon</u>	
 Parent/Legal Guardian Information:	
Parent: [REDACTED] <small>Last, First, Middle</small>	
Home Address: [REDACTED] <small>Street City, State Zip</small>	
Home Phone: [REDACTED]	mail: [REDACTED]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [REDACTED] Date: 10/23/22
IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063



7 of 8



Responses cannot be edited

Enrollment Interest Form

Thank you for your interest in our program. Please fill out this form to express interest in enrolling your student at Healy School for the 2023-2024 School Year. This is not enrollment. There is no cost. This is simply expressing interest in enrolling for the 2023-2024 School Year.

* Required

Email *



Preferred Daytime Phone *



Cell Phone Number *



Parent / Guardian Name *



Student's First Name (one form per student) *



Student's Last Name (one form per student) *



Student's Date of Birth *

MM DD YYYY

06 / 07 / 2016

Grade for 2023 - 2024 School Year *

☐ Transitional Kindergarten

☐ Kindergarten

☐ 1st

☒ 2nd

☐ 3rd

☐ 4th

☐ 5th

How did you hear about us? *

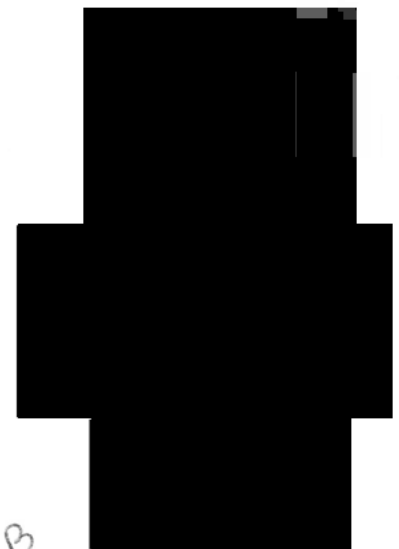
Facebook

Zip Code

94949

Submitted 8/20/23 10:25 AM

2nd



DOB

Hamilton

Responses cannot be edited

Enrollment Interest Form

Thank you for your interest in our program. Please fill out this form to express interest in enrolling your student at Healy School for the 2023-2024 School Year. This is not enrollment. There is no cost. This is simply expressing interest in enrolling for the 2023-2024 School Year.

* Required

Email *

Preferred Daytime Phone *

Cell Phone Number *

Parent / Guardian Name *

Student's First Name (one form per student) *

Student's Last Name (one form per student) *

Student's Date of Birth *

MM / DD / YYYY

04 / 23 / 2015

Grade for 2023 - 2024 School Year *

- ☐ Transitional Kindergarten
- ☐ Kindergarten
- ☐ 1st
- ☒ 2nd
- ☐ 3rd
- ☐ 4th
- ☐ 5th

How did you hear about us? *

Novato Facebook parents group

Zip Code

94945

2nd

DOB

San Ramon Elementary

Submitted 5/5/2023 12:23PM

Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Information

Student Name: _____ <small>Last, First, Middle</small>	Grade in 2023-24: <u>2</u> TK, K, 1, 2, 3
Home Address: _____ <small>Street City, State Zip</small>	
Home Phone: _____	Age of Student: <u>7</u> Date of Birth of Student: _____
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: _____ <small>Last, First, Middle</small>	
Home Address: <u>same</u> <small>Street City, State Zip</small>	
Home Phone: <u>same</u> Email: _____	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: _____ Date: 10/25/22

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Healy School
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Information

Student Name: [REDACTED]	Grade in 2023-24: <u>2</u> TK, K, 1, <u>2</u>
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: <u>same</u>	Age of Student: <u>7</u> Date of Birth of Student: [REDACTED]
Current Charter School student? Y/N (circle one) <u>N</u>	
Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>N</u>	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED]	
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: [REDACTED]	Email: [REDACTED]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required to answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [REDACTED]

Date: 10-25-22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
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Information

Student Name: _____ Last, First, Middle	Grade in 2023-24: <u>2</u> TK, K, 1, <u>2</u>
Home Address: _____ Street City, State Zip	
Home Phone: _____	Age of Student: <u>9</u> Date of Birth of Student: _____
Current Charter School student? Y/N (circle one) <u>N</u>	
Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>N</u>	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Ynwood</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: _____ Last, First, Middle	
Home Address: _____ Street City, State Zip	
Home Phone: _____	Email: _____

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required to answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: _____ Date: 10-26-22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Documentación de interés significativo de los padres para inscribirse o reinscribirse
En apoyo de una solicitud para obtener instalaciones escolares

Estimado padre/tutor de actual o futuro estudiantes de la Healy School

Bajo la ley de California (Proposición 39) el Distrito Escolar de NUSD tiene que proveer a la Healy School instalaciones razonablemente equivalentes en donde se pueda operar la Healy School. Este formulario puede ser usado para apoyar la solicitud para instalaciones de la Healy School. Al devolver este formulario, usted está indicando que tiene un interés significativo de inscribir o reinscribir a su estudiante en el programa de chárter para el curso escolar 2023-24. ¡Gracias por su apoyo y su cooperación!

Información del Estudiantes:

Estudiante:	
Nombre: [REDACTED]	Grado en el año 2023-24: <u>2nd</u> TK, K, 1, 2 <u>2</u>
Apellido, Primer Nombre, Segundo Nombre	
Domicilio: [REDACTED]	
Calle, Ciudad	
Teléfono de Casa: [REDACTED]	Edad del Estudiante: <u>8</u> Fecha de Nacimiento:
¿Estudiante actual de Charter School? <u>Sí/No</u> (marque uno) <u>2</u>	
¿Reside usted dentro de los límites del Distrito Escolar de NUSD? <u>Sí/No</u> (marque uno)	
Si contesto sí, por favor identifique la escuela dentro del distrito a la cual su estudiante de otra manera asistiría: <u>Lynwood</u>	
Nombre del padre o tutor legal: [REDACTED]	
Apellido, Primer Nombre, Segundo Nombre	
Domicilio: [REDACTED]	
Calle, Ciudad, Estado, Código Postal	
Teléfono de Casa: [REDACTED]	Correo Electrónico: [REDACTED]

Con mi firma, indico que tengo un interés significativo de inscribir o reinscribir al estudiante mencionado arriba en la Healy School para el curso escolar 2023-24. Entiendo que al firmar este formulario no garantiza matriculación en la Healy School. También entiendo que esta información será revelada al Distrito Escolar de NUSD (Novato Unified School District) para apoyar la solicitud de instalaciones bajo la Proposición 39 de la Healy School. Los distritos han hablado al los padres directamente para verificar su interés significativo. Yo entiendo que si el Distrito me habla, tengo el derecho de no contestar las preguntas, pero puedo confirmar que tengo interés significativo de inscribir o reinscribir mi hijo/hija en la Healy School. healyschoolinc@gmail.com or 415-320-1063

Firma del Padre o Tutor Legal: [REDACTED] Fecha: 10-26-2022

Healy School
Meaningful Interest Form
for purposes of requesting facilities

Dear Parent or Guardian,

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Information

2 students
2/TK

Student Name: _____ <small>Last, First, Middle</small>	Grade in 2023-24: _____ <small>TK, K, 1, 2,</small>
Home Address: _____ <small>Street City, State Zip</small>	
Home Phone: _____	Age of Student: <u>7</u> Date of Birth of Student: _____
Current Charter School student? Y/N (circle one) <u>N</u>	
Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>Y</u>	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Lymwood</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian: _____ <small>Last, First, Middle</small>	
Home Address: _____ <small>Street City, State Zip</small>	
Home Phone: _____	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: _____ Date: 10-26-22

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Healy School
Meaningful Interest Form
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Information

7yrs old

Student Name: [redacted] Grade in 2023-24: TK/2nd TK, K, 1, 2,

Home Address: [redacted] 3yrs old (TK)

Home Phone: _____ Age of Student: _____ Date of Birth of Student: _____

Current Charter School student? Y/N (circle one) ☒ Y

Resident of NUSD (Novato Unified School District)? Y/N (circle one) ☒ Y

If yes, please list the school within the District your son/daughter would otherwise attend:
Hamilton Meadow Park School

Parent/Legal Guardian Information:

Parent/Legal Guardian Name: [redacted]

Home Address: [redacted]

Home Phone: [redacted]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [signature]

Date: Oct 31st

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

2022

Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Information

Student Name: [REDACTED] Last, First, Middle	Grade in 2023-24: <u>A</u> TK, K, 1, 2, <u>3</u>
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: [REDACTED]	Student: <u>7</u> Date of Birth of Student: [REDACTED]
Current Charter School student? Y/N (circle one) <u>N</u>	
Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>N</u>	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton Meadow Park School</u> <u>K-8</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED]	
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: <u>Same</u>	Email: _____

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature]

Date: Oct 31-22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
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Healy School
Documentación de interés significativo de los padres para inscribirse o reinscribirse
En apoyo de una solicitud para obtener instalaciones escolares

Estimado padre/tutor de actual o futuro estudiantes de la Healy School

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Información del Estudiantes:

Estudiante:	
Nombre: [Redacted]	Grado en el año 2023-24: <u>1</u> TK, K <u>1</u> 2
Apellido: [Redacted]	
Domicilio: [Redacted]	
Calle, Ciudad, Estado, Código Postal [Redacted]	
Teléfono de Casa: <u>same</u>	Edad del Estudiante: <u>6</u> Fecha de Nacimiento: [Redacted]
¿Estudiante actual de Charter School? <u>No</u> (marque uno)	
¿Reside usted dentro de los límites del Distrito Escolar de NUSD? <u>No</u> (marque uno)	
Si contesto sí, por favor identifique la escuela dentro del distrito a la cual su estudiante de otra manera asistiría: <u>Loma Verde</u>	
Nombre del padre o tutor legal: [Redacted]	
Apellido, Primer Nombre, Segundo Nombre	
Domicilio: <u>same</u>	
Calle, Ciudad, Estado [Redacted]	
Teléfono de Casa: [Redacted]	

Con mi firma, indico que tengo un interés significativo de inscribir o reinscribir al estudiante mencionado arriba en la Healy School para el curso escolar 2023-24. Entiendo que al firmar este formulario no garantiza matriculación en la Healy School. También entiendo que esta información será revelada al Distrito Escolar de NUSD (Novato Unified School District) para apoyar la solicitud de instalaciones bajo la Proposición 39 de la Healy School. Los distritos han hablado al los padres directamente para verificar su interés significativo. Yo entiendo que si el Distrito me habló, tengo el derecho de no contestar las preguntas, pero puedo confirmar que tengo interés significativo de inscribir o reinscribir mi hijo/hija en la Healy School. healyschoolinc@gmail.com or 415-320-1063

Firma del Padre o Tutor Legal: [Redacted]

Fecha: 10-30-22

Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Student Information:

Name: [Redacted] <small>Last, First, Middle</small>	Grade in 2023-24: <u>1st</u> TK, K, 1, 2, <u>1st</u>
Home Address: [Redacted] Street City, State Zip	
Home Phone: <u>same</u>	Age: <u>5</u> Date of Birth: [Redacted]
Current Charter School student? Y/N (circle one) <u>Y</u> Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>Y</u> If yes, please list the school within the District your son/daughter would otherwise attend: <u>private school</u>	
Parent/Legal Guardian Information: [Redacted]	
Parent/Legal Guardian Name: [Redacted]	
Last, First, Middle [Redacted]	
Home Address: [Redacted] Street City, State Zip	
Home Phone: [Redacted]	mail: _____

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: 10/28/22

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Student Information:

Name: [REDACTED]	Grade in 2023-24: <u>4th</u> <u>5th</u> TK, K, 1, 2,
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: [REDACTED]	Age: <u>8.5</u> Date of Birth: [REDACTED]
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton Park</u>	
(not correct yet m)	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED]	
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: [REDACTED]	

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Signature of Parent/Legal Guardian: [Signature] Date: 10.28.2022
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Student Information:

Name: [REDACTED]	Grade in 2023-24: <u>1st</u> TK, K, 1, 2,
<small>Last, First, Middle</small>	
Home Address: [REDACTED]	
<small>Street City, State</small>	
Home [REDACTED]	Date of Birth: [REDACTED]
<small>Home Phone</small>	
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Lynwood</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED]	
<small>Last, First, Middle</small>	
Home Address: <u>same</u>	
<small>Street City, State</small>	
Home Phone: [REDACTED]	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: 10/27/22
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Healy School
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En apoyo de una solicitud para obtener instalaciones escolares

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Información del Estudiantes:

Estudiante:	
Nombre: [Redacted]	Grado en el año 2023-24: <u>1</u> TK, K, <u>1</u> , 2
Apellido, Primer Nombre, Segundo Nombre: [Redacted]	
Domicilio: [Redacted]	
Calle, Ciudad, Estado, Código Postal	
Teléfono de Casa: [Redacted]	Edad del Estudiante: <u>5 años</u> Fecha de Nacimiento:
[Redacted]	
¿Estudiante actual de Charter School? <u>Sí/No</u> (marque uno)	
¿Reside usted dentro de los límites del Distrito Escolar de NUSD? <u>Sí/No</u> (marque uno)	
Si contesto sí, por favor identifique la escuela dentro del distrito a la cual su estudiante de otra manera asistiría:	
<u>Hamilton</u>	
Nombre del padre o tutor legal: [Redacted]	
Apellido, Primer Nombre, Segundo Nombre	
Domicilio: [Redacted]	
Calle, Ciudad, Estado	
Teléfono de Casa: [Redacted]	

Con mi firma, indico que tengo un interés significativo de inscribir o reinscribir al estudiante mencionado arriba en la Healy School para el curso escolar 2023-24. Entiendo que al firmar este formulario no garantiza matriculación en la Healy School. También entiendo que esta información será revelada al Distrito Escolar de NUSD (Novato Unified School District) para apoyar la solicitud de instalaciones bajo la Proposición 39 de la Healy School. Los distritos han hablado al los padres directamente para verificar su interés significativo. Yo entiendo que si el Distrito me habló, tengo el derecho de no contestar las preguntas, pero puedo confirmar que tengo interés significativo de inscribir o reinscribir mi hijo/hija en la Healy School. healschoolinc@gmail.com or 415-320-1063

Firma del Padre o Tutor Legal: [Redacted] Fecha: 10-25-22

Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Information

Student Name: [REDACTED]	Grade in 2023-24: <u>1</u> TK, K, 1, 2,
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: [REDACTED]	Age of Student: <u>7</u> Date of Birth of Student: [REDACTED]
Current Charter School student? <input checked="" type="radio"/> Y/N (circle one)	
Resident of NUSD (Novato Unified School District)? <input checked="" type="radio"/> Y/N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Novato District - Hami Hon</u>	
Parent/Legal Guardian Information: [REDACTED]	
Parent/Legal Guardian Name: [REDACTED]	
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: [REDACTED]	Email: [REDACTED]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [REDACTED] Date: 10/25/22
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Information

Student Name: [REDACTED]	Grade in 2023-24: <u>1</u> TK, K, 1, 2,
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State Zip	
Home Phone: [REDACTED]	Age of Student: <u>6</u> Date of Birth of Student: [REDACTED]
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED]	
Last, First, Middle	
Home Address: <u>same</u>	
Street City, State Zip	
Home Phone: [REDACTED]	Email: _____

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [REDACTED]

Date: 10/25/22

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Student Information:

(6) years old
1st grade

Name: [Redacted]	Grade in 2023-24: 1st TK, K, 1, 2
Last, First, Middle	
Home Address: [Redacted]	
Street City, State Zip	
Home Phone: [Redacted]	Age: (6) Date of Birth: [Redacted]
Current Charter School student? Y/N (circle one)	
Resident of NUSD (Novato Unified School District)? Y/N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: Hamilton	
Parent/Legal Guardian Information: [Redacted]	
Parent/Legal Guardian: [Redacted]	
Last, First	
Home Address: [Redacted]	
Street City, State Zip	
Home Phone: [Redacted]	Email: [Redacted]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Redacted]

Date: 10/24/22

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or call 415-320-1063

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Information

Student Name: [REDACTED] <small>Last, First, Middle</small>	Grade in 2023-24: [REDACTED] TK, K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12
Home Address: [REDACTED] <small>Street City, State Zip</small>	
Home Phone: [REDACTED]	Age of Student: 5 Date of Birth of Student: [REDACTED]
Current Charter School student? Y/N (circle one) <u>Y</u> Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>Y</u> If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED] <small>Last, First, Middle</small>	
Home Address: <u>same</u> <small>Street City, State Zip</small>	
Home Phone: [REDACTED] Email: [REDACTED]	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: _____

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

another student

[REDACTED] [REDACTED] [REDACTED]

FYR

2/21

and grade

Healy School
Documentación de interés significativo de los padres para inscribirse o reinscribirse
En apoyo de una solicitud para obtener instalaciones escolares

Estimado padre/tutor de actual o futuro estudiantes de la Healy School

Bajo la ley de California (Proposición 39) el Distrito Escolar de NUSD tiene que proveer a la Healy School instalaciones razonablemente equivalentes en donde se pueda operar la Healy School. Este formulario puede ser usado para apoyar la solicitud para instalaciones de la Healy School. Al devolver este formulario, usted está indicando que tiene un interés significativo de inscribir o reinscribir a su estudiante en el programa de chárter para el curso escolar 2023-24. ¡Gracias por su apoyo y su cooperación!

Información del Estudiantes:

Estudiante:	
Nombre: [REDACTED]	Grado en el año 2023-24: <u>K</u> TK, <u>1</u> , 2
Domicilio: [REDACTED] Calle, Ciudad, Estado, Código Postal	
Teléfono de Casa: [REDACTED]	Edad del Estudiante: <u>6</u> Fecha de Nacimiento:
¿Estudiante actual de Charter School? Sí <u>No</u> (marque uno)	
¿Reside usted dentro de los límites del Distrito Escolar de NUSD? Sí <u>No</u> (marque uno)	
Si contesto sí, por favor identifique la escuela dentro del distrito a la cual su estudiante de otra manera asistiría: <u>Novato - Lu Sutton</u>	
Nombre del padre o tutor legal: [REDACTED]	
Domicilio: [REDACTED] Calle, Ciudad, Estado, Código Postal	
Teléfono de Casa: [REDACTED]	Correo Electrónico: [REDACTED]

Con mi firma, indico que tengo un interés significativo de inscribir o reinscribir al estudiante mencionado arriba en la Healy School para el curso escolar 2023-24. Entiendo que al firmar este formulario no garantiza matriculación en la Healy School. También entiendo que esta información será revelada al Distrito Escolar de NUSD (Novato Unified School District) para apoyar la solicitud de instalaciones bajo la Proposición 39 de la Healy School. Los distritos han hablado al los padres directamente para verificar su interés significativo. Yo entiendo que si el Distrito me habló, tengo el derecho de no contestar las preguntas, pero puedo confirmar que tengo interés significativo de inscribir o reinscribir mi hijo/hija en la Healy School. healyschoolinc@gmail.com or 415-320-1063

Firma del Padre o Tutor Legal: [REDACTED] Fecha: 10-24-22

Responses cannot be edited

Enrollment Interest Form

Thank you for your interest in our program. Please fill out this form to express interest in enrolling your student at Healy School for the 2023-2024 School Year. This is not enrollment. There is no cost. This is simply expressing interest in enrolling for the 2023-2024 School Year.

* Required

Email *

Preferred Daytime Phone *

Cell Phone Number *

Parent / Guardian Name *

Student's First Name (one form per student) *

Student's Last Name (one form per student) *

Student's Date of Birth *

MM DD YYYY

11 / 01 / 2017

Grade for 2023 - 2024 School Year *

☐ Transitional Kindergarten

☒ Kindergarten

☐ 1st

☐ 2nd

☐ 3rd

☐ 4th

☐ 5th

How did you hear about us? *

parentsquare

Zip Code

Submitted 10/11/22 3:21 PM

DOB

Student

Hamilton

Enrollment Interest Form

Thank you for your interest in our program. Please fill out this form to express interest in enrolling your student at Healy School for the 2023-2024 School Year. This is not enrollment. There is no cost. This is simply expressing interest in enrolling for the 2023-2024 School Year.

Email*

Preferred Daytime Phone *

Cell Phone Number *

Parent / Guardian Name *

Student's First Name (one form per student) *

Student's Last Name (one form per student) *

Student's Date of Birth*

MM / DD / YYYY

09 / 10 / 2017

Grade for 2023 - 2024 School Year *

- ☐ Transitional Kindergarten
- ☒ Kindergarten
- ☐ 1st
- ☐ 2nd
- ☐ 3rd
- ☐ 4th
- ☐ 5th

How did you hear about us? *

Facebook

Zip Code

student

DOB

K

olive
Elementary

This content is neither created nor endorsed by Google

Google Forms

2 of 8

Responses cannot be edited

Enrollment Interest Form

Thank you for your interest in our program. Please fill out this form to express interest in enrolling your student at Healy School for the 2023-2024 School Year. This is not enrollment. There is no cost. This is simply expressing interest in enrolling for the 2023-2024 School Year.

* Required

Email *

Preferred Daytime Phone *

Cell Phone Number *

Parent / Guardian Name *

Student's First Name (one form per student) *

Student's Last Name (one form per student) *

Student's Date of Birth *

MM / DD / YYYY

11 / 11 / 2017

Grade for 2023 - 2024 School Year *

☐ Transitional Kindergarten

☒ Kindergarten

☐ 1st

☐ 2nd

☐ 3rd

☐ 4th

☐ 5th

How did you hear about us? *

Facebook

Zip Code

DOB

K

Pleasant Valley

Healy School
Meaningful Interest Form
for purposes of requesting facilities

Dear Parent or Guardian,

Under California law (i.e., Proposition 39) NUSD must provide Healy School reasonably equivalent school facilities in which to operate the charter school. This Form may be used to support the Charter School's request for facilities. By submitting this Form, you are indicating that you are meaningfully interested in enrolling or re-enrolling (as applicable) your child/children in the Charter School's classroom-based program during the 2023-24 school year. Thank you very much for your support and cooperation!

Information

Student Name: [REDACTED] Last, First, Middle	Grade in 2023-24: <u>K</u> TK, K, 1, 2,
Home Address: [REDACTED] Street City, State	
Home Phone: [REDACTED]	Age of Student: <u>5</u> Date of Birth of Student: [REDACTED]
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED] Last, First, Middle	
Home Address: <u>Same</u> Street City, State Zip	
Home Phone: [REDACTED]	Email: _____

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [REDACTED]

Date: 25/10/22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
for purposes of requesting facilities

Dear Parent or Guardian,

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Information

Student Name: _____ Last, First, Middle	Grade in 2023-24: <u>K</u> TK, K, 1, 2,
Home Address: _____ Street City, State	
Home Phone: _____	Age of Student: <u>4</u> Date of Birth of Student: _____
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District) <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: _____ Last, First, Middle	
Home Address: _____ Street City, State Zip	
Home Phone: <u>same</u> Email: _____	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required to answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: _____

Date: 10/25/22

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Healy School
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Information

Student Name: _____ Last, First, Middle	Grade in 2023-24: <u>K</u> TK, K, 1, 2,
Home Address: _____ Street City, State	
Home Phone: _____	Age of Student: <u>5</u> Date of Birth of Student: _____
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: _____ Last, First, Middle	
Home Address: _____ Street City, State Zip	
Home Phone: _____	Email: _____

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: _____

Date: 10/25/22

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Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Information

Student Name: [REDACTED] Last, First, Middle	Grade in 2023-24: <u>K</u> TK, K, 1, 2,
Home Address: [REDACTED] Street City, State zip	
Home Phone: <u>same</u> Age of Student: <u>5</u> Date of Birth of Student: [REDACTED]	
Current Charter School student? Y/N (circle one) <u>N</u> Resident of NUSD (Novato Unified School District)? Y/N (circle one) <u>N</u> If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED] Last, First, Middle	
Home Address: [REDACTED] Street City, State zip	
Home Phone: [REDACTED]	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: 10/25/22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Student Information:

Name: [REDACTED] <small>Last, First</small>	Grade in 2023-24: <u>K</u> TK, <u>(K)</u> 1, 2,
Home Address: [REDACTED] Street City, State Zip	
Home Phone: <u>same</u> Age: <u>4</u> Date of Birth: [REDACTED]	
Current Charter School student? Y/N (circle one)	
Resident of NUSD (Novato Unified School District)? Y/N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton</u>	
Parent/Legal Guardian Information	
Parent/Legal Guardian Name: [REDACTED] <small>Last, First, Middle</small>	
Home Address: _____ Street City, State Zip	
Home Phone: [REDACTED]	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: 10/28/22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Information

Student Name: [Redacted] (TK) [Redacted] (K) Grade in 2023-24: 3 TK, K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12
Last, First, Middle [Redacted] 10/6

Home Address: [Redacted]
Street City, State Zip [Redacted]

Home Phone: [Redacted] Age of Student: 3/4 Date of Birth of Student: [Redacted]

Current Charter School student? Y/N (circle one) ☒ N
Resident of NUSD (Novato Unified School District)? Y/N (circle one) ☒ N
If yes, please list the school within the District your son/daughter would otherwise attend:
Hamilton

Parent/Legal Guardian Information:

Parent: [Redacted]
Last, First, Middle [Redacted]

Home Address: [Redacted]
Street City, State Zip [Redacted]

Home Phone: [Redacted] Email: [Redacted]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required to answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: 10/30/22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Information

(K)

Student Name: [REDACTED] Last, First, Middle	Grade in 2023-24: <u>TK</u> TK, K, 1, 2,
Home Address: [REDACTED] Street City, State Zip	
Home Phone: [REDACTED]	Student: <u>4/2</u> Date of Birth of Student [REDACTED]
Current Charter School student? <u>Y/N</u> (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y/N</u> (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED] Last, First, Middle	
Home Address: <u>same</u> Street City, State Zip	
Home Phone: [REDACTED]	

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: 10/25/22
IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
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Information

Student Name: [Redacted] <small>Last, First, Middle</small>	Grade in 2023-24: <u>4^K</u> TK, <u>K</u> , 1, 2,
Home Address: [Redacted] <small>Street City, State Zip</small>	
Home Phone: [Redacted]	of Student: <u>4/2</u> Date of Birth of Student: [Redacted]
Current Charter School student? Y/ <u>N</u> (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> / <u>N</u> (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [Redacted] <small>Last, First, Middle</small>	
Home Address: <u>Same</u> <small>Street City, State Zip</small>	
Home Phone: <u>Same</u>	Email: [Redacted]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature] Date: 10/25/2022
IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
for purposes of requesting facilities

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Information

Student Name: [REDACTED] Last, First, Middle	Grade in 2023-24: <u>TK</u> <input checked="" type="radio"/> TK, <input type="radio"/> K, <input type="radio"/> 1, <input type="radio"/> 2,
Home Address: <u>Same</u>	
Street City, State	<u>3</u>
Home Phone: [REDACTED]	Student: [REDACTED] Date of Birth of Student: [REDACTED]
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information: [REDACTED]	
Parent/Legal Guardian Name: [REDACTED]	
Last, First, Middle	
Home Address: [REDACTED]	
Street City, State	
Home Phone: [REDACTED]	Email: [REDACTED]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian:  Date: 10/30/22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Documentación de interés significativo de los padres para inscribirse o reinscribirse
En apoyo de una solicitud para obtener instalaciones escolares

Estimado padre/tutor de actual o futuro estudiantes de la Healy School

Bajo la ley de California (Proposición 39) el Distrito Escolar de NUSD tiene que proveer a la Healy School instalaciones razonablemente equivalentes en donde se pueda operar la Healy School. Este formulario puede ser usado para apoyar la solicitud para instalaciones de la Healy School. Al devolver este formulario, usted está indicando que tiene un interés significativo de inscribir o reinscribir a su estudiante en el programa de chárter para el curso escolar 2023-24. ¡Gracias por su apoyo y su cooperación!

Información del Estudiantes:

Estudiante:	
Nombre:	Grado en el año 2023-24: <u>TK</u> <u>TK, K, 1, 2</u>
Apellido, P	
Domicilio:	
Calle, Ciudad, Estado	
Teléfono de Casa:	Estudiante: <u>4</u> Fecha de Nacimiento:
¿Estudiante actual de Charter School? <u>Sí</u> /No (marque uno)	
¿Reside usted dentro de los límites del Distrito Escolar de NUSD? <u>Sí</u> /No (marque uno)	
Si contesto sí, por favor identifique la escuela dentro del distrito a la cual su estudiante de otra manera asistiría: <u>Loma Verde</u>	
Nombre del padre o tutor legal:	
Domicilio:	
Calle, Ciudad, Estado	
Teléfono de Casa:	Electrónico:

Con mi firma, indico que tengo un interés significativo de inscribir o reinscribir al estudiante mencionado arriba en la Healy School para el curso escolar 2023-24. Entiendo que al firmar este formulario no garantiza matriculación en la Healy School. También entiendo que esta información será revelada al Distrito Escolar de NUSD (Novato Unified School District) para apoyar la solicitud de instalaciones bajo la Proposición 39 de la Healy School. Los distritos han hablado al los padres directamente para verificar su interés significativo. Yo entiendo que si el Distrito me habló, tengo el derecho de no contestar las preguntas, pero puedo confirmar que tengo interés significativo de inscribir o reinscribir mi hijo/hija en la Healy School. healyschoolinc@gmail.com or 415-320-1063.

Firma del Padre o Tutor Legal: _____ Fecha: 10/26/22

Healy School
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Information

Student Name: [REDACTED] <small>Last, First, Middle</small>	Grade in 2023-24: <u>TK</u> <small>TK, K, 1, 2,</small>
Home Address: <u>same</u> <small>Street City, State Zip</small>	
Home Phone: <u>same</u>	Age of Student: <u>3</u> Date of Birth of Student: [REDACTED]
Current Charter School student? <u>Y</u> /N (circle one) Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one) If yes, please list the school within the District your son/daughter would otherwise attend: <u>Lynwood</u>	
Parent/Legal Guardian Information [REDACTED]	
Parent/Legal Guardian Name: [REDACTED]	
<small>Last, First, Middle</small> [REDACTED]	
Home Address: [REDACTED]	
Street City, State:	[REDACTED]
Home Phone:	[REDACTED]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian [REDACTED]

Date: 10/30/22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Documentación de interés significativo de los padres para inscribirse o reinscribirse
En apoyo de una solicitud para obtener instalaciones escolares

Estimado padre/tutor de actual o futuro estudiantes de la Healy School

Bajo la ley de California (Proposición 39) el Distrito Escolar de NUSD tiene que proveer a la Healy School instalaciones razonablemente equivalentes en donde se pueda operar la Healy School. Este formulario puede ser usado para apoyar la solicitud para instalaciones de la Healy School. Al devolver este formulario, usted está indicando que tiene un interés significativo de inscribir o reinscribir a su estudiante en el programa de chárter para el curso escolar 2023-24. ¡Gracias por su apoyo y su cooperación!

Información del Estudiantes:

Estudiante:	
Nombre: [REDACTED]	Grado en el año 2023-24: <u>TK</u> <u>0</u> TK, K, 1, 2
Domicilio: [REDACTED] Calle, Ciudad, Estado, Código Postal	
Teléfono de Casa: [REDACTED]	Edad del Estudiante: <u>4</u> Fecha de Nacimiento: [REDACTED]
¿Estudiante actual de Charter School? Sí/No (marque uno)	
¿Reside usted dentro de los límites del Distrito Escolar de NUSD? Sí/No (marque uno)	
Si contesto sí, por favor identifique la escuela dentro del distrito a la cual su estudiante de otra manera asistiría: <u>Lynwood</u>	
Nombre del padre o tutor legal: [REDACTED] Apellido, Primer Nombre, Segundo Nombre	
Domicilio: <u>same</u> Calle, Ciudad, Estado, Código Postal	
Teléfono de Casa: [REDACTED]	Correo Electrónico: [REDACTED]

Con mi firma, indico que tengo un interés significativo de inscribir o reinscribir al estudiante mencionado arriba en la Healy School para el curso escolar 2023-24. Entiendo que al firmar este formulario no garantiza matriculación en la Healy School. También entiendo que esta información será revelada al Distrito Escolar de NUSD (Novato Unified School District) para apoyar la solicitud de instalaciones bajo la Proposición 39 de la Healy School. Los distritos han hablado al los padres directamente para verificar su interés significativo. Yo entiendo que si el Distrito me habló, tengo el derecho de no contestar las preguntas, pero puedo confirmar que tengo interés significativo de inscribir o reinscribir mi hijo/hija en la Healy School. healyschoolinc@gmail.com or 415-320-1063

Firma del Padre o Tutor Legal: [Signature] Fecha: 10/30/22

Healy School
Meaningful Interest Form
for purposes of requesting facilities

Dear Parent or Guardian,

Under California law (i.e., Proposition 39) NUSD must provide Healy School reasonably equivalent school facilities in which to operate the charter school. This Form may be used to support the Charter School's request for facilities. By submitting this Form, you are indicating that you are meaningfully interested in enrolling or re-enrolling (as applicable) your child/children in the Charter School's classroom-based program during the 2023-24 school year. Thank you very much for your support and cooperation!

Information

Student Name: _____	Grade in 2023-24: <u>TK</u> <u>9</u>
Last, First, M _____	
Home Address: _____	
Street City, State _____	
Home Phone: _____	of Student: <u>3</u> Date of Birth of Student: _____
Current Charter School student? <u>Y</u> /N (circle one)	
Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: _____	
Last, First, Middle _____	
Home Address: <u>same</u>	
Street City, State Zip _____	
Home Phone: <u>same</u> Email: _____	

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Signature of Parent/Legal Guardian: _____

Date: _____

10/25/22

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Information

Student Name: [Redacted]	Grade in 2023-24: <u>TK</u> <input checked="" type="radio"/> TK, <input type="radio"/> K, <input type="radio"/> 1, <input type="radio"/> 2,
Last, First, Middle	
Home Address: [Redacted]	
Street City, State Zip	
Home Phone: [Redacted]	Age of Student: <u>4</u> Date of Birth of Student: [Redacted]
Current Charter School student? <input checked="" type="radio"/> Y <input type="radio"/> N (circle one)	
Resident of NUSD (Novato Unified School District)? <input checked="" type="radio"/> Y <input type="radio"/> N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton</u>	
Parent/Legal Guardian Information: [Redacted]	
Parent/Legal Guardian Name: [Redacted]	
Last, First, Middle	
Home Address: [Redacted]	
Street City, State Zip	
Home Phone: [Redacted]	Email: [Redacted]

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Redacted] Date: 10/25/22

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Information

Student Name: _____ Last, First, Middle	Grade in 2023-24: <u>TK</u> TK, K, 1, 2,
Home Address: _____ Street City, State Zip	
Home Phone: _____	Age of Student: <u>4</u> Date of Birth of Student: _____
Current Charter School student? Y/N (circle one)	
Resident of NUSD (Novato Unified School District)? Y/N (circle one)	
If yes, please list the school within the District your son/daughter would otherwise attend: <u>Hamilton</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: _____ Last, First, Middle	
Home Address: <u>same</u> Street City, State Zip	
Home Phone: _____	Email: _____

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: _____ Date: 10-25-2022

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Healy School
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Information

(TK) (2nd) Two students

Student Name: [Redacted] Grade in 2023-24: 8 TK, K, 1, 2, 3

Home Address: Same 3 [Redacted] Street City, State Zip [Redacted]

Home Phone: [Redacted] Student: [Redacted] Date of Birth of Student: [Redacted]

Current Charter School student? Y/N (circle one) 0
Resident of NUSD (Novato Unified School District)? Y/N (circle one) 0
If yes, please list the school within the District your son/daughter would otherwise attend:
Miwak (Peta luma charter valley Elementary charter school Schools)

Parent/Legal Guardian Information:

Parent/Legal Guardian Name: [Redacted]
Last, First, Middle [Redacted]
Home Address: [Redacted]
Street City, State Zip [Redacted]
Home Phone: [Redacted]

TK

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature]

Date: 10/31/22

IMPORTANT! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063

Healy School
Meaningful Interest Form
for purposes of requesting facilities

Dear Parent or Guardian,

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Information

Student Name: [REDACTED] Last, First, Middle	Grade in 2023-24: <u>TK</u> TK, K, 1, 2,
Home Address: [REDACTED] Street City, State Zip	
Home Phone: <u>415-123-4567</u>	Age of Student: <u>3</u> Date of Birth of Student: [REDACTED]
Current Charter School student? <u>Y</u> /N (circle one) Resident of NUSD (Novato Unified School District)? <u>Y</u> /N (circle one) If yes, please list the school within the District your son/daughter would otherwise attend: <u>Loma Verde</u>	
Parent/Legal Guardian Information:	
Parent/Legal Guardian Name: [REDACTED] Last, First, Middle	
Home Address: <u>same</u> Street City, State Zip	
Home Phone: [REDACTED]	Email: <u>10/31/22</u>

By signing below, I am indicating that I am meaningfully interested in potentially enrolling the above-named child(ren) in Healy School for the 2023-24 school year. I understand that signing this Form does not guarantee enrollment in the Charter School. I further understand that this information will be disclosed to NUSD to support the Charter School's request for facilities under Proposition 39. Districts have been known to call parents directly to verify their interest; I understand that if the District does contact me, I am not required answer any questions but may choose to confirm that I am meaningfully interested in enrolling my child(ren) at the Charter School.

Signature of Parent/Legal Guardian: [Signature]

Date: 10/31/22

IMPORTANT!! Return by Oct 29, 2022, in person, by mail, or by fax to: healyschoolinc@gmail.com
or call 415-320-1063



Jan La Torre-Derby, Ed.D.
Superintendent

1015 7th St
Novato, CA 94945

Lois Standring
Assistant Superintendent of
Business & Operations

T: 415.493.4250
www.nusd.org

Via Email

December 1, 2022

Healy School Charter School
Attn: Maureen Healy
Novato, CA 94945
healyschoolinc@gmail.com

**Re: Healy School Charter School's Request for Proposition 39 Facilities
Novato USD Objections to Projected ADA and Rejection/Return of Request**

Dear Ms. Healy:

The Novato Unified School District ("District") received your letter dated November 1, 2022, requesting Proposition 39 facilities for the 2023-24 School Year ("Request") for Healy School Charter School ("Healy" or "Charter School").

As you are aware, the allocation of facilities to charter schools is governed by Education Code section 47614, the implementing regulations found at Title 5 of the California Code of Regulations ("Regulations") sections 11969 et seq., and relevant case law interpreting the statute and applicable Regulations. These authorities provide for allocation of the District's facilities to charter schools that have the requisite number of in-district average daily attendance ("ADA") and meet the requirements of the law in applying for such facilities.

1. Legal Authority and Requirements

Section 47614 of the Education Code and Sections 11969.9(c)(1) and (2) of the Regulations require that the Charter School submit certain information by November 1, 2022, to be eligible for allocation of District facilities for the 2023-24 school year. Sections 11969.9(c)(1) and (2) of the Regulations require the Charter School to submit the following information in its written facilities request so the District can evaluate the Request and determine whether the Healy's in-District ADA projection is reasonable:

- a. Reasonable projections of in-district and total ADA and in-district and total classroom ADA, based on ADA claimed for apportionment, if any, in the fiscal year prior to the fiscal year in which the facilities request is made, adjusted for expected changes in enrollment in the forthcoming fiscal year. Projections of in-district ADA, in-district classroom ADA, and the number of in-district students

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shall be broken down by grade level and by the school in the school district that the student would otherwise attend.

- b. Description of the methodology for the projections.
- c. If relevant (i.e., when a charter school is not yet open or to the extent an operating charter school projects a substantial increase in in-district ADA), documentation of the number of in-district students meaningfully interested in attending the charter school that is sufficient for the district to determine the reasonableness of the projection, but that need not be verifiable for precise arithmetical accuracy.
- d. The charter school's operational calendar.
- e. Information regarding the district school site and/or general geographic area in which the charter school wishes to locate.
- f. Information on the charter school's educational program, if any, that is relevant to assignment of facilities.

As held in the case of *Environmental Charter High School v. Centinela Valley Union High School District* (2004) 122 Cal.App.4th 139, both Education Code section 47614 and Regulations section 11969.9(c) mandate inclusion of foundational documentation with a charter school's facilities request. Accordingly, Healy is required to support its projections with documentation from the number of in-district students meaningfully interested in attending the Charter School so the District can determine the reasonableness of the projections.

In accordance with the applicable legal authorities, the District has reviewed Healy's projections of in-District and total ADA and in-District and total classroom ADA provided in its Request. This correspondence is written in response to Healy's Request, and expresses the District's objections to the projections submitted, and sets forth the in-District Classroom ADA projection that the District considers reasonable.

2. Healy's Projections Are Not Reasonable

In its Request, Healy is required to set forth "reasonable projections of in-district and total ADA and in-district and total classroom ADA" along with reliable foundational documents sufficient for the District to determine the reasonableness of the projection, in accordance with Sections 11969.9(c)(1)(A) and (C) of the Regulations. Section 11969.9(c)(1)(B) of the Regulations also requires Healy to provide a description of the methodology it utilized in reaching its projection. Table 4 in the Request, representing Total In-District Classroom ADA, includes a total projection of 89.3. After the District's thorough review of the information provided in and with the Request, the District finds that Healy's ADA projections for the 2023-24 school year are not reasonable within the meaning of the applicable provisions of the Regulations and Education Code section 47614.

Supporting Documentation

Healy did not submit documentation evidencing the number of in-District students meaningfully interested in attending the Charter School in 2023-24 needed for the District to determine the

reasonableness of the Charter School's projections. (5 Cal. Code Regs. § 11969.9(c).) Even though Healy projects that it will enroll 86 in-District students in 2023-24, it only submitted what is it represents as "Meaningful Interest" forms for 48 students.

According to the District's analysis of the "Meaningful Interest" documents submitted by Healy (see below), the District has calculated that the supporting documentation submitted with the Request represents no more than 41 meaningfully interested in-District students:

- Documents representing three (3) in-District students appear to be an online "Enrollment Interest Form" that states: "Thank you for your interest in our program. Please fill out this form to express interest in enrolling your student at Health School for the 2023-2024 School Year. This is not enrollment. There is no cost. This is simply expressing interest in enrolling for the 2023-2024 School Year." The form states nothing about whether the person completing the form is meaningfully interested in having their child attend the Charter School next school year and the three forms are not signed electronically or otherwise.
- One form representing one (1) in-District student seems to be signed by the "parent/legal guardian" but it is not dated.
- One form representing one (1) in-District student is signed by a parent/legal guardian that does not match the name of the parent/guardian information provided.
- One form representing one (1) in-District student is signed by a parent/legal guardian but that signature is crossed-out.
- One form representing one (1) in-District student does not include an address so the District is unable to confirm whether this student resides in the District.

In addition to the "Meaningful Interest" documents Healy references the following to demonstrate the reasonableness of their in-District projections: (1) "ADA from NUSD per their website"; (2) "ADA from Ross Valley Charter Board Meetings"; and (3) a Marin Independent Journal article about Novato Unified School District's enrollment increases. However, since none of these sources represent documentation of the number of in-District students meaningfully interested in attending the Charter School, they do not support Healy's in-District projections for purposes of Proposition 39.

3. District's Reasonable Projections for 2023-24

Based upon the documentation submitted with the Request and the objections noted in this correspondence, for 2023-24 the District considers a projected total in-District classroom ADA of 43.16 based on a 95% enrollment to ADA ratio to be reasonable. However, since Healy has not identified at least 80 in-District students who are meaningfully interested in enrolling in the Charter School for 2023-2024, it is not "operating" in the District for purposes of Proposition 39 (See Educ. Code § 47614), and therefore, does not satisfy the minimal threshold qualifications necessary to request facilities from the District.

4. Rejection/Return of Request

This letter not only addresses the District's written objections to Healy's in-District enrollment projections in accordance with Section 11969.9(d) of the Regulations but serves to reject and return the Request due to Healy's failure to satisfy the threshold minimal qualifications necessary to request Proposition 39 facilities from the District.

Therefore, since Healy does not qualify for Proposition 39 facilities the Request is **rejected and returned** and the District considers the Proposition 39 process concluded with no further processing required.

Sincerely,



Lois Standring

Assistant Superintendent of Business & Operation

Novato Unified School District



December 31, 2022

Sent via email only

Lois Standing, Director
Assistant Superintendent
Novato Unified School District
1015 7th Street
Novato, California 94945

***Re: Healy School
Response to District ADA Objections
Proposition 39 2023-24***

Dear Ms. Standing:

Healy School (or the “Charter School”) is in receipt of the Novato Unified School District’s (“District”) December 1, 2022, letter (“Letter”), in which the District objects to the Charter School’s in-District classroom average daily attendance projection (“in-District ADA”) submitted with its November 1, 2022, request for Proposition 39 facilities for the 2023-24 school year (“Request”). In the letter, the District objects to the Charter School’s projected in-District classroom ADA of 89.30 and asserts a counter-projection of 43.16 based upon its assertion that “Healy’s ADA projections for the 2023-24 school year are not reasonable within the meaning of the applicable provisions of the Regulations and Education Code section 47614.” (Letter at p. 2.) Specifically, the District’s sole contention is that “since Healy has not identified at least 80 in-District students who are meaningfully interested in enrolling in the Charter School for 2023-2024, it is not “operating” in the District for purposes of Proposition 39 (See Educ. Code§ 47614), and therefore, does not satisfy the minimal threshold qualifications necessary to request facilities from the District.” (Letter at p. 3.)

The District’s objections are not only unreasonable and inconsistent with the purpose and intent of Proposition 39, as described below, and as to the District’s unilateral assertion that “the District considers the Proposition 39 process concluded with no further processing required” (Letter at p. 4), this statement is astoundingly unlawful. Accordingly, the purpose of this letter is to respond to the District’s objections as required pursuant to California Code of Regulations, title 5, section 11969.9, subdivisions (d) and (e) (collectively, along with sections 11969.1-10, the “Prop 39 Regulations.”) For the reasons set forth below, the Charter School reaffirms its projection of in-District classroom ADA of 89.30 for the 2023-24 school year.¹

¹ The Charter School does not contest the District’s acceptance of the Charter School’s projected ADA rate of 0.95.

Applicable Law

The Prop 39 Regulations state that a charter school must provide: (i) “reasonable projections of in-district and total ADA and in-district and total classroom ADA;” (ii) “a description of the methodology used for the projections;” and (iii) “if relevant (i.e., when a charter school is not yet open or to the extent an operating charter school projects a substantial increase in in-district ADA), documentation of the number of in-district students meaningfully interested in attending the charter school that is sufficient for the district to determine the reasonableness of the projection, but that need not be verifiable for precise arithmetical accuracy.” (Cal. Code Regs., tit. 5, § 11969.9, subd. (c); emphasis added.) Therefore, as long as the Charter School’s projections are reasonable, the District must accept and allocate facilities based on those ADA projections.

Indeed, “reasonable” is defined in Black’s Law Dictionary as “fair, proper, or moderate under the circumstances.” In other words, (and despite the District’s express contradiction) the Charter School is not required to provide a one-to-one correlation of names and addresses for each unit of ADA it projects; it need only provide documentation to show its projections are “reasonable” or fair, proper, or moderate under the circumstances.

The Court in *Sequoia Union High School Dist. v. Aurora Charter High School* provided further clarification on this issue:

By modifying “projection” with the adjective “reasonable” (Ed. Code § 47614, subd. (b)(2)), the statute necessarily implies the charter school must offer some explanation in its facilities request for the basis for its projection. However, the statute does not require the school to demonstrate arithmetical precision in its projection or provide the kind of documentary or testimonial evidence that would be admissible at a trial. Rather, the school is subsequently penalized if its projection was incorrect by having to reimburse the district for over-allocated space. (*Sequoia v. Aurora*, (2003) 112 Cal.App.4th 185, 195-96; Ed. Code § 47614, subd. (b)(2); emphasis added.)

This reasoning was subsequently memorialized in Section 11969.9(c)(1)(C) of the Prop 39 Regulations.

In this case, the District’s objection (i.e., “since Healy has not identified at least 80 in-District students who are meaningfully interested in enrolling in the Charter School for 2023-2024, it is not “operating” in the District for purposes of Proposition 39) are expressly demanding a level of one-to-one correlation and arithmetical precision that is not consistent with the intent of the Prop 39 Regulations. The supporting documentation and methodology presented by the Charter School must show that its projections are reasonable – not exact.

Furthermore, the Final Statement of Reasons approved by the State Board of Education (“SBE”) and released with the new Proposition 39 Regulations state that “documentation of the number of in-district students meaningfully interested in attending the charter school is sufficient to determine the reasonableness of the projection though the documentation *need not be verifiable*

for precise arithmetical accuracy,” and provides additional clarity on the matter of what types of documentation are considered sufficient:

Submission to the district of the names and addresses of meaningfully interested students and parents would be limited to new charter schools (that have no historical information on enrollment and attendance) and continuing schools to the extent of anticipated [*substantial*] increases in enrollment. Required information would be limited to *names and addresses*, consistent with the statement of legislative intent in EC Section 49073.5 to “minimize” the release of telephone numbers “in the absence of express parental consent.” Names and addresses should be sufficient foundational information for school districts to determine the reasonableness of ADA projections. (Final Statement of Reasons at p. 6; emphasis added.)

The California Court of Appeals also provided a more recent analysis in *California School Bds. Assn. v. State Bd. of Education*, confirming that a request for an existing charter school that projects a substantial increase in enrollment:

“...must provide ‘*some explanation*’ and ‘a showing’ of the charter school’s projected ADA because the facilities request must still explain the charter school’s methodology, break down its projections into grade level and district school that would otherwise be attended, and the district can access the charter school’s prior year documentation to evaluate the request. If the charter school overestimates its projected ADA, the district will be entitled to reimbursement for over allocated space. (Ed. Code, § 47614, subd. (b)(2).) ... Considered together, the provisions of Regulations, section 11969.9 require a charter school to provide a school district with *some explanation*, based on a documentary showing, of its ADA projections. Although the School District Associations argue more information is necessary, we see no reason to believe, on this facial challenge to the regulation, that the information required by section 11969.9 will be insufficient to allow a school district to carry out its duties to evaluate the facilities request and provide reasonably equivalent facilities.” (*California School Bds. Assn. v. State Bd. of Education*, (2010) 191 Cal.App.4th 530, 564-65; emphasis added.)

In sum, while the Charter School is required to provide some explanation for its projections, as well as documentation to support its projections, ***this documentation need not be a one-to-one match for each unit of projected ADA***, and must only be “sufficient for the district to determine the reasonableness of the projection, but ... ***need not be verifiable for precise arithmetical accuracy***.” (Cal. Code Regs., tit. 5 § 11969.9, subd. (c)(1)(C); emphasis added.)

The Charter School’s In-District ADA Projection is Reasonable and is Supported by Adequate Documentation

The Charter School submitted adequate documentation to support its projected in-District ADA of 89.30. Specifically, at the time of its Request on November 1, 2022, the Charter School

provided the District with documentation identifying 48 meaningfully interested 2023-24 TK -2nd grade in-District students as follows:

Transitional Kindergarten (2023-24)

- 12 meaningfully interested new in-District TK students for 2023-24 toward a reasonable projection of 22.80 TK students. Therefore, 52% of the projected grade level is an already identified meaningfully interested student as of December 2022 and before the completion of the Charter School's recruitment and enrollment period.

Kindergarten (2023-24)

- 12 meaningfully interested new in-District Kindergarten students for 2023-24 toward a reasonable enrollment projection of 22.80 Kindergarten in-District students for 2023-24. Therefore, 52% of the projected grade level is an already identified meaningfully interested student as of December 2022 and before the completion of the Charter School's recruitment and enrollment period.

1st Grade (2023-24)

- 9 meaningfully interested new in-District 1st grade students for 2023-24 toward a reasonable enrollment projection of 23.75 grade one in-District students for 2023-24. Therefore, 37% of the projected grade level is an already identified meaningfully interested student as of December 2022 and before the completion of the Charter School's recruitment and enrollment period.

2nd Grade (2023-24)

- 15 meaningfully interested new in-District 2nd grade students for 2023-24 toward a reasonable enrollment projection of 19.95 grade two in-District students for 2023-24. Therefore, 75% of the projected grade level is an already identified meaningfully interested student as of December 2022 and before the completion of the Charter School's recruitment and enrollment period.

In other words, more than nine months before the start of the 2023-24 school year and several months before the completion of the Charter School's recruitment and enrollment period, the Charter School had already provided supporting evidence and/or documentation for 51% (48 of 95) of its projected in-District ADA (or already 45.60 in-District ADA nine months before the start of the school year using new meaningfully interested students.

Although the Charter School is not required to provide documentation amounting to a one-to-one correlation of its projected in-District ADA, the Charter School's already 51% documentation support rate strongly indicates that the Charter School will achieve its enrollment projections by the start of the 2023-24 school year.) **Indeed, since submitting its Request, the Charter School has received 1 additional Meaningfully Interested/Intent to Enroll form identifying the names and addresses of meaningfully interested in-district new students for 2023-24, which are submitted herewith, and brings its documentation rate to 52%.** The Charter School will continue to speak with interested families, discuss our program, and receive meaningfully interested forms with the intent to enroll. The fact we got one more form is a positive sign considering that we don't yet have a facility (we are going through the Prop 39 process) and

demonstrates the reasonableness of the Charter School's projection. Our recruitment efforts will start in earnest in the Spring of 2023. Even assuming the District's assertion that as of the Charter School's request it had established only 46 indisputable meaningfully interested in-district new students for 2023-24 (which the Charter School does not concede), by the District's own disputed methodology the Charter School's projected in-district ADA is already 54% of the minimum 80.00 in-District ADA required under Prop 39 and the reasonableness of the Charter School's projection even more established.

The District must consider all information submitted by the Charter School to demonstrate the reasonableness of its projections, not only review the names and addresses submitted by the Charter School and demand one-to-one correlations. As the Court in *Rocketship Education v. Mt. Diablo Unified School District* (Case No. N17-0137) stated:

“Interpreting the Implementing Regulations to provide a narrow scope of review is bolstered by a consideration of the parties' respective incentives. Charter schools have a strong incentive not to overestimate enrollment, because they must pay for empty classroom space. (Ed. Code, § 47614, subd. (b)(2); Cal. Code Regs., tit. 5, § 11969.8. See, *Sequoia Union High School Dist. v. Aurora Charter High School* (2003) 112 Cal.App.4th 185, 196 [“the school is subsequently penalized if its projection was incorrect by having to reimburse the district for over-allocated space”].) Hostile school districts, on the other hand, have every incentive to underestimate enrollment because they face no countervailing financial penalty. ***The regulations cannot be interpreted so as to give school districts carte blanche to lowball projected enrollment, thereby starving potentially viable charter schools of the classroom facilities they need to grow and thrive. Proposition 39 was enacted to prevent such conduct, and not to enable it.***” (Emphasis added.)

Here, the District has disregarded and ignored critical and relevant information that demonstrates the Charter School's reasonable projections of ADA, which will deny the Charter School the space it needs to serve those students who wish to attend the Charter School.

Furthermore, if the Charter School has in fact overestimated its ADA, the District's remedy is, in this circumstance, not to unilaterally reduce the Charter School's projected ADA to unreasonable levels; rather, the District's remedy is to reclaim over-allocated space or levy an over-allocation penalty on the Charter School. (Cal. Code Regs., tit. 5, § 11969.8.)

By comparison, in *Sequoia*, the Court noted that Aurora Charter High School (“Aurora”) had provided 93 Intent to Enroll forms from “in-district students who were either currently attending Aurora and planning to continue or had applied for admission for the 2002-2003 school year” with its request for facilities to accommodate 110 students – in other words, forms to support 84% of its projections as well as historic attendance rates and proof of its current enrollment of 90, along with “the expressed interest of current students and their families of continuing education at Aurora, and the expressed interest of prospective students and their families in attending Aurora during the next academic year.” (*Sequoia, supra*, at 196.) The Court then determined that Aurora had provided sufficient supporting documentation to demonstrate that its projections were

reasonable and ordered the Sequoia Union High School District to allocate facilities to Aurora based on the projections in original request for facilities.

It is unmistakable from the *Sequoia* ruling that Meaningfully Interested/Intent to Enroll forms, whether from existing or new students, are sufficient foundational documentation by which a District may determine the reasonableness of a charter school's ADA projections ***and the Prop 39 Regulations do not require a charter school to submit an Intent to Enroll form for every student it projects to enroll. Historical data and information is also relevant and must be considered.*** As the Charter School has provided comparable documentation of meaningful interest to support its projections as was provided in *Sequoia* along with general enrollment trends data, it has fully complied with the requirement to provide the District with sufficient foundational documentation and data by which the District is able to determine the reasonableness of its ADA projections. Thus, the Charter School's ADA projections are reasonable and were supported by ample, reliable documentation of meaningful interest.

The District's Counter-Projection of 43.16 is Arbitrary and Unreasonable

For all the reasons set forth above, the Charter School believes that its in-District classroom ADA projection of 89.30 is reasonable and cannot unreasonably be reduced to 43.16.

The Charter School originally provided the District with reliable documentation reflecting at least 48 meaningfully interested in-District new students, which supported 51% of the Charter School's in-District classroom ADA projection more than nine months before the start of the 2023-24 school year, and which strongly indicates that the Charter School will easily achieve its enrollment projections by the start of the 2023-24 school year. **Indeed, the Charter School has received 1 additional Meaningfully Interested/Intent to Enroll forms identifying the names and addresses of new meaningfully interested in-district students for 2023-24 and now supports 52% of its projected in-District ADA.** The Charter School's receipt of an additional meaningfully interested student still more than seven months before the start of the 2023-24 school year demonstrates the likelihood (and, therefore, reasonableness) of the Charter School reaching its projections. The data it provided regarding district enrollment trends, which the District did not address at all, shows that the District's projections are unreasonable in light of the Charter School's supporting documentation and information.

As such, the District's methodology for arriving at its counter-projection of 43.16 in-District ADA is unreasonable and inequitable and assumes, without any justification, that the Charter School will not receive any Meaningfully Interested/Intent to Enroll forms or Enrollment Applications between now and August 2023 while the Charter School completes its recruitment and enrollment efforts.

Additionally, the Charter School's projection for 2023-24 was made in the ongoing COVID-19 pandemic and its aftermath, which, at it has upon the District's operations, significantly impacted the Charter School. Nonetheless, the District's failure to provide any detail or substantive analysis or explanation for its counter-projection further demonstrates the lack of reasonableness in its counter-projection, particularly given the detailed methodology section included in the Charter School's Request. The District must also provide actual, detailed information explaining

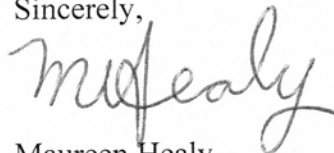
how it arrived at its counter-projection with specific references to the documentation provided to justify any reductions, and why that counter-projection is reasonable. Therefore, the District's reduction of the Charter School's projected ADA is unreasonable.

Conclusion

Based on the foregoing, the Charter School has responded in detail to the District's objections and addressed the District's concerns. Furthermore, the Charter School has provided reliable documentation and clarifying information that more than reasonably supports the Charter School's in-District ADA projections and has demonstrated how the District's projections are unreasonable. Accordingly, the Charter School anticipates that the District's Preliminary Offer on or before February 1, 2023, will allocate reasonably equivalent facility space sufficient to accommodate the school's total projected in-District classroom ADA of 89.30.

We look forward to resolving any remaining concerns and receiving the District's written Preliminary Proposal on or before February 1, 2023, to accommodate the Charter School's entire projected in-District ADA of 89.30 pursuant to Section 11969.9(f). In the meantime, the Charter School would appreciate the opportunity to discuss with the District any remaining concerns and responses outlined herein.

Sincerely,

A handwritten signature in cursive script, appearing to read 'm. healy'.

Maureen Healy
Lead Petitioner

healyschoolinc@gmail.com
415-320-1063

Enclosure: Meaningful Interest Form

Enrollment Interest Form

Thank you for your interest in our program. Please fill out this form to express interest in enrolling your student at Healy School for the 2023-2024 School Year. This is not enrollment. There is no cost. This is simply expressing interest in enrolling for the 2023-2024 School Year.

Email *

Preferred Daytime Phone *

Cell Phone Number *

Parent / Guardian Name *

Student's First Name (one form per student) *

Student's Last Name (one form per student) *

Student's Date of Birth *

MM DD YYYY

Grade for 2023 - 2024 School Year *

- ☐ Transitional Kindergarten
- ☒ Kindergarten
- ☐ 1st
- ☐ 2nd
- ☐ 3rd
- ☐ 4th
- ☐ 5th

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Ed.D.

1015 7th Street
Novato, CA 94945
(415) 493-4211

February 1, 2023

Healy School Charter School
Attn: Maureen Healy
Novato, CA 94945
healyschoolinc@gmail.com

**Re: Healy School Charter School's Request for Proposition 39 Facilities
Rejection Confirmation**

Dear Ms. Healy:

As previously acknowledged, the Novato Unified School District ("District") received your letter dated November 1, 2022, requesting Proposition 39 facilities for the 2023-24 school year ("Request") for Healy School Charter School ("Healy" or "Charter School"). The allocation of facilities to charter schools under Proposition 39 ("Prop. 39") is governed by Education Code section 47614, the implementing regulations found at Title 5 of the California Code of Regulations sections 11969 et seq. ("Regulations"), and relevant case law interpreting the statute and Regulations.

The purpose of this letter is to confirm that the District rejects the Request and will not be providing a preliminary facilities proposal to Healy since Healy has not identified 80 or more in-District students who are meaningfully interested in enrolling in the Charter School in the 2023-24 school year.

The allocation of facilities under Prop. 39 is based upon "in-district classroom ADA." Only projected students that would otherwise be entitled to attend the schools of the district (other than by transfer or parental employment) are considered for the purposes of Prop 39. (Ed. Code, section 47614; Regulations, section 11969.2(c).) "Facilities requests based upon projections of fewer than 80 units of average daily classroom attendance for the year may be denied by the school district." (Ed. Code, section 47614(b)(4).)

By correspondence dated December 1, 2022, the District provided Healy with written objections ("Objection Letter") to its in-District ADA projections and rejected/returned the Request due to Healy's failure to identify at least 80 in-District students who are meaningfully interested in enrolling in Healy in the 2023-24 school year. Specifically, the District concluded that the documentation submitted by Healy supported no more than 41 meaningfully interested in-District students, far below the minimal 80 student threshold.

Documentation Submitted Does Not Support Healy is "Operating" in the District

Since Healy is not currently providing public education to in-District students, to qualify to receive facilities for the 2023-24 fiscal year under Prop. 39, Healy was required to identify 80 or more in-District students who are meaningfully interested

in enrolling in the Charter School next school year. As noted in the District's Objection Letter, a charter school submitting a request for facilities under Prop. 39 must submit certain information to a school district by November 1 to be eligible for an allocation of district facilities for the following school year. This information enables the school district to determine whether the charter school's in-district ADA projection is reasonable. The information that Healy was required to submit includes:

If relevant (i.e., when a charter school is not yet open or to the extent an operating charter school projects a substantial increase in in-district ADA), documentation of the number of in-district students meaningfully interested in attending the charter school that is sufficient for the district to determine the reasonableness of the projection, but that need not be verifiable for precise arithmetical accuracy. (Regulations, section 11969.2(c), emphasis added.)

As the court determined in *Environmental Charter High School v. Centinela Valley Union High School District* (2004) 122 Cal.App.4th 139 ("Environmental"), both Education Code section 47614 and Regulations section 11969.9(c), mandate inclusion of foundational documentation for Healy's projections to enable the District to review the reasonableness of those projections.

Specifically, Healy was required to support its projections with documentation of the number of in-District students meaningfully interested in attending the Charter School in the 2023-24 school year that was sufficient for the District to determine the reasonableness of Healy's projections. Even though Healy projects that it will enroll 86 in-District students in 2023-24, it only submitted documentation that it referred to as "Meaningful Interest" forms for 48 students.¹ Therefore, since Healy failed to submit the required documentation, it is within the District's discretion to deny Healy's Request.

Healy's Response to District Objection Letter

Healy responded to the District's Objection Letter with correspondence dated December 31, 2022 ("Response") and included additional untimely documentation in purported support for Charter School's projections. In the Response, Healy continues to maintain that its projection of 89.30 in-District ADA for 2023-24 is reasonable even though it admittedly only submitted documentation identifying "48 meaningfully interested" in-District students. The basis upon which Healy asserts that its projections are reasonable include:

- Healy submitted supporting documentation for 51% (48 of 95) of its projected in-District ADA several months before completion of the Charter School's recruitment and enrollment period.

¹ For the reasons detailed in the District's Objection Letter, the documentation submitted by Healy with its Request supported a projection of no more than 41 in-District students.

- Healy provided one (1) additional “Enrollment Interest Form” which it asserts brings the total number of “meaningfully interested” in-District students to 49.²
- In addition to the “Meaningful Interest” documents, Healy again references information submitted with its Request which Healy asserts demonstrates the reasonableness of its in-District projections, including (1) ADA from NUSD per its website;³ (2) ADA from Ross Valley Charter Board Meetings;⁴ and (3) *Marin Independent Journal* article about Novato Unified School District’s “enrollment jump.”⁵

While this information was apparently provided to show the student population is growing and there is a demand for charter schools in the area, it does not represent documentation of the number of in-District students meaningfully interested in attending the Charter School.

Despite Healy’s Response and further attempt to assert that its in-District enrollment projections are reasonable, the fact remains that Healy has not submitted documentation of the number of in-District students meaningfully interested in attending the Charter School.

Subsequently Received Information

Subsequent to its receipt of Healy’s Response, it was reported to the District that multiple families signed the “meaningfully interested” forms Healy submitted in support of its Request without understanding what they were signing. Specifically, multiple families with limited English language proficiency reported that the person(s) gathering signatures on behalf of Healy only spoke to them in English. As a result, these families did not correctly understand why signatures were being gathered. Specifically, these families reported that they incorrectly believed that they were signing a form in support of programs at Hamilton School, and not Healy Charter School.

Since these families were in fact not meaningfully interested in attending Healy in 2023-24, several more of the forms submitted by Healy in support of its Request cannot be relied upon in support of the ADA projections. This additional information further bolsters the District’s determination that Healy has failed to provide the necessary documentation to satisfy the minimal requirements to qualify for Prop. 39 facilities.

² This additional form was not only submitted late but is deficient for the same reasons the District notes for similar forms submitted with the Request since it states nothing about whether the person completing the form is meaningfully interested in having their child attend the Charter School next school year, is not signed electronically or otherwise, and contains no address to confirm whether the student resides in the District.

³<https://nUSD.org/wp-content/uploads/2022/05/Average-Daily-Attendance-Summary-4.19.22.pdf>

⁴ <https://bit.ly/3CSfQVL>

⁵<https://www.marinij.com/2022/08/10/novato-school-district-reports-robust-enrollment-jump/>



Rejection Confirmation

For the reasons discussed in this letter and our prior Objection Letter, the District confirms its rejection of the Request since Healy failed to reasonably support a projection of 80 or more in-District classroom ADA for the 2023-24 school year. To accept unsupported, and therefore unreasonable projections would run contrary to the requirements and intent of Prop. 39 and unfairly impact District students. As a result, the District will not be providing a preliminary proposal to Healy in response to its Request for 2023-24 facilities.

Sincerely,

Jan La Torre-Derby, Ed.D.
Superintendent
Novato Unified School District



FEBRUARY 21, 2023

Lois Standring
Assistant Superintendent, Business & Operations
Novato Unified School District
1015 7th Street
Novato, California 94945

*Re: Healy School
Demand for Preliminary Offer of Facilities
Proposition 39 2023-24*

Dear Ms. Standring:

This letter serves as a demand from the Healy School (the "Charter School") for an offer of reasonably equivalent facilities from the Novato Unified School District (the "District") for the 2023-24 school year in accordance with Section 47614 of the Education Code ("Proposition 39"). As detailed in our letter dated December 31, 2022, the Healy School is entitled to an offer of facilities from the District based upon the 89.30 projected in-District classroom ADA projected by the Charter School in its November 1, 2022, request. The District has violated Proposition 39 by failing to provide a preliminary proposal of reasonably equivalent facilities to the Healy School ("Preliminary Offer") by the February 1 deadline provided in subdivision (f) of Section 11969.9 of the regulations implementing Proposition 39 (5 Cal. Code Reg. §§ 11969.1-11969.10 [the "Implementing Regulations"].) The Healy School hereby reiterates its demand for the functional equivalent of a Preliminary Offer in accordance with the Implementing Regulations. Barring further action from the District, please take note that the Charter School may be forced to file suit in order to challenge the District's failure, as set forth in the District's February 1, 2023, letter, to issue a preliminary proposal and its further confirmation that it will not prepare a final notification of space to the Charter School pursuant to California Code of Regulations, title 5, section 11969.9, subdivisions (f) and (h) for the 2023-24 school year. The Healy School demands that the District provide a Preliminary Offer to the Charter School no later than March 1, 2023.

In our December 31, 2022, letter, we informed the District that Proposition 39 compels the District to provide a Preliminary Offer to the Charter School. This Preliminary Offer must be based upon the Charter School's projected in-District classroom ADA of 89.30. The District has asserted a counter-projection of 43.16 in-District classroom ADA, and claims that Healy School had not produced adequate documentation to support its projection – thus denying the Healy School an allocation of facilities under Prop. 39 for the 2023-24 school year. Most significantly, the District is unconscionably proposing to deny reasonably equivalent facilities to resident public school

students of Novato Unified over an unreasonably disputed ADA difference between the District's projection and its obligation to provide space for projections of 80.00 units of in-District classroom ADA or more pursuant to Education Code Section 47614(b)(4). As explained in our December 31, 2022, letter, which is incorporated herein by reference, Proposition 39 does not allow the District to make an arbitrary "low-ball" counter-projection in this manner.

As further explained below, the Healy School has demonstrated that it has complied fully with Proposition 39 and is entitled to a Preliminary Offer. The Healy School provided the District with sufficient explanation and reliable supporting documentation to clearly demonstrate the reasonableness of its in-District classroom ADA projection of 89.30 for the 2023-24 school year.

THE DISTRICT MUST PROVIDE A PRELIMINARY OFFER

Under the Implementing Regulations, the Charter School must provide "documentation of the number of in-district students meaningfully interested in attending the charter school that is sufficient for the district to determine the reasonableness of the projection, but that need not be verifiable for precise arithmetical accuracy." (5 CCR § 11969.9, subd. (c) [emphasis added].) In *Sequoia Union High School Dist. v. Aurora Charter High School* (2003) 112 Cal.App.4th 185, the Court found that Proposition 39 does not "require the school to demonstrate arithmetical precision in its projection or provide the kind of documentary or testimonial evidence that would be admissible at a trial." (*Id.* at 195-196.) Instead, if the Charter School's projection turns out to be overstated, the District's remedy is to charge an over-allocation penalty. (*Ibid.*; 5 CCR § 11969.8.)

The District's tactic in this case is identical to the approach that has been characterized as "hostile" by reviewing courts. In *Rocketship v. Mt. Diablo Unified School District* (Contra Costa Superior Court, Case No. MSN17-0137), the Court specifically found that Proposition 39 does not permit a "low-ball" counter-projection such as asserted by the District in this case, which serves only to further a hostile agenda intended to "starve" the Charter School of the facilities to which it is entitled under Proposition 39.

The District can point to no authority to support its position that the Charter School must provide a one-to-one correlation between the documentation of each student and its in-District ADA projection. Again, the Implementing Regulations, as interpreted by the Courts, do not require such proof.

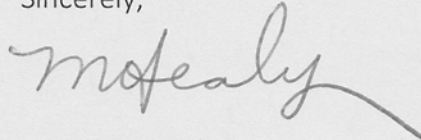
The Healy School has provided a comprehensive response to the District on this point and will not reiterate those arguments here. It is sufficient to note that Proposition 39 entitles the Healy School to a Preliminary Offer, and the District has no lawful basis upon which to deny such a Preliminary Offer in this case.

Assistant Superintendent Standing
Re: Healy School
Demand for Preliminary Offer of Facilities
Proposition 39 2023-24
February 21, 2023
Page 3 of 3

* * *

If the District intends to offer reasonably equivalent teaching and non-teaching space for the Charter School's program for the 2023-24 school year, please provide a Preliminary Offer including further detail regarding the particular classrooms to be occupied by the Healy School, and the proposed terms of a draft Facilities Use Agreement, by no later than March 1, 2022.

Sincerely,

A handwritten signature in dark ink, appearing to read 'm. healy', with a long, sweeping horizontal line extending to the right.

Maureen Healy
Lead Petitioner
415-320-1063
healyschoolinc@gmail.com

Appendix F:

Public Correspondence

**Healy School Charter Petition
Community Correspondence**

Healy School Charter Petition

Community Correspondence Regarding the Charter School Petition

Name	Date Received
Maija Schaefer	2/14/2023
Barbara Roddie	2/14/2023
Tanya Grasser	2/14/2023
Tenesa Vuilleminot	2/13/2023
Karrie Coulter	2/13/2023

Superintendents Office

From: Maija Schaefer <maija@brasslantern.com>
Sent: Tuesday, February 14, 2023 10:07 AM
To: Fel Agrelius; Li Delpan; Patricia D. Garbarino; Greg Knell; Curtis F. Robinson M.D.; Marilyn Nemzer; Clairette C. Wilson; Superintendents Office
Subject: Please vote No on the Healy Charter School

As a Novato parent, I am concerned that the Healy Charter School would impose a significant financial burden on the existing schools and resources for the students of NUSD, and the proposed benefits have not been adequately detailed.

Thank you for your consideration of this issue.

Superintendents Office

From: Barbara Roddie <barbdesrod@comcast.net>
Sent: Tuesday, February 14, 2023 9:17 AM
To: Superintendents Office
Subject: Healy Charter

No to the Healy Charter in Novato.

Barbara Roddie

Superintendents Office

From: Tanya Grasser <tanyagrasser@gmail.com>
Sent: Tuesday, February 14, 2023 9:12 AM
To: Fel Agrelius; Li Delpa; Patricia D. Garbarino; Greg Knell; Marilyn Nemzer; Curtis F. Robinson M.D.; Clairette C. Wilson; Superintendents Office
Subject: NO to the "Healy School" Charter

Dear Trustees and Superintendent Carroll,

I just heard that you'll be meeting today to discuss the proposed "Healy School" Charter. I hope you will do the right thing and VOTE NO.

I was very relieved when the NUSD Board of Trustees took the advice of NUSD staff to unanimously deny the petition in November 2022. This proposed charter school will take much-needed money and resources away from existing NUSD schools and programs, and its resilience curriculum isn't needed. It also doesn't sound like the petition was well-developed, which isn't a good sign of things to come.

NUSD recently recovered from a severe budget crisis and is facing an uncertain future with the renewal of a parcel tax (and even if it passes, it doesn't include any increases). NUSD can't afford another charter school siphoning off funds from existing schools that are already struggling to survive and thrive.

Please vote NO.

Thank you,

Tanya Eckert Grasser
Novato, CA
Parent of a Novato High/MSA 2020 graduate and a Novato High Class of 2024 student

Superintendents Office

From: Tenesa Vuillemenot <tenesamv@gmail.com>
Sent: Monday, February 13, 2023 11:29 PM
To: Fel Agrelius; delpan@marinschools.org; Patricia D. Garbarino; Greg Knell; Curtis F. Robinson M.D.; Clairette C. Wilson; Superintendents Office; Marilyn Nemzer
Subject: Healy Charter School Hearing

superintendentsoffice@marinschools.org

Dear Superintendent Carroll and Board of Education Members,

I am a parent of two NUSD middle school students, active school and PTA volunteer and a proud product of the California public school system.

I am opposed to the Healy Charter School and ask you to concur with the NUSDs denial of the charter petition. The reasons for the denial are well documented within the NUSD staff report. Charter schools have an important place within our educational system, but this does not present a sound charter school option and would not serve the community.

NUSD did their due diligence and spent valuable time and resources reviewing the petition. Ms. Healy was either unprepared or unaware of the nature and process of the charter school approval process and failed to deliver a petition worthy of approval.

Kind Regards,
Tenesa Vuillemenot

Superintendents Office

From: KARRIE COULTER <KCOULTER@nUSD.org>
Sent: Monday, February 13, 2023 4:01 PM
To: Superintendents Office; Fel Agrelius; Li Delpa; Patricia D. Garbarino; Greg Knell; Marilyn Nemzer; Curtis F. Robinson M.D.; Clairette C. Wilson
Cc: EMY MACAL; Jan LaTorre Derby
Subject: Hamilton Mother's Club to Attend Charter to School Petition Appeal 2/14/23
Attachments: MCOE letter.docx

Hello-My name is Karrie Coulter. I am the English Learner Program Coordinator for Novato Unified. I am writing to you to let you know that a group of parents from the Hamilton Mother's Club will be attending tomorrow's public hearing to protest in opposition of the Healy Charter School petition. The parents intend to make a public comment regarding the deception in which the signatures in support of the Healy Charter School were obtained. Please see the attached letter that will be read during the public comment portion of the meeting.

Please let me know if you have any questions.

Karrie



Karrie Coulter

English Learner Program Coordinator

415.493.4214 | kcoulter@nUSD.org | www.NUSD.org
1015 7th St, Novato, CA 94945



Febrero 14 del año 2023

Carta de denuncia publica

Mi nombre es Lilian, y represento a una de varias familias de la escuela de Hamilton que firmaron estos formularios sin comprender las verdaderas intenciones de la Sra. Healy.

Hace unos meses estaba en casa con mis hijos, alguien tocó la puerta de mi apartamento, vivimos en un barrio predominantemente hispano. Cuando abrí mi puerta, era una señora que solo me hablaba inglés y se identificó como una persona que estaba recolectando firmas para traer más servicios y programas a la Escuela Hamilton. Ella solo hablaba ingles y yo solo hablaba español, pero usó palabras en español que pude entender donde me dijo "Hamilton School, Good, good school" y eso fue lo único que entendí y pensé que estoy ayudando a mi escuela y comunidad si firmo este papel.

NUNCA, imagine las consecuencias de firmar un documento que para empezar no entendía porque solo estaba en inglés, nunca me explicaron nada en español que es mi idioma principal. Si hubiera sabido cuál era la intención de ese formulario, nunca lo habría firmado. Todos mis hijos asisten a Hamilton y amamos nuestra escuela y nuestro distrito. NO QUEREMOS NINGUNA ESCUELA MÁS QUE HAMILTON.

Gracias por escuchar mi historia.

My name is, _____. And I represent one of several Hamilton school families who signed these forms without understanding Ms. Healy's true intentions.

A few months ago, I was at home with my children, someone knocked on my apartment door, we live in a Hispanic neighborhood. When I opened my door, it was a lady who only spoke English to me and identified herself as a person who was collecting signatures to bring more services and programs to Hamilton School. She only spoke English and I only spoke Spanish, but she used words in Spanish that I could understand where she told me "Hamilton School, Good, good school" and that was the only thing I understood, and I thought I am helping my school and community if I sign this paper.

NEVER, imagine the consequences of signing a document that I did not understand to begin with because it was only in English, nothing was ever explained to me in Spanish, which is my main language. If I had known what the intention of that form was, I would never have signed it. All my children attend Hamilton, and we love our school and district. WE WANT NO SCHOOL OTHER THAN HAMILTON.

Thanks for listening to my story.

February 14, 2023

Public Complaint

Hello, good afternoon, everyone. My name is: _____, and I am representing the Hamilton Mother's Club and at the same time I represent the group of families from our school who could not be here for work reasons, but I have been entrusted to Share their feelings with this group.

We, the more than a dozen families who signed that form without being clear about the intentions of the people who were collecting names and signatures in our neighborhood. We want to make a public complaint of the deception of which we were victims a few months ago by the group of people who represent the Healy Charter School.

This group of people walked through our neighborhoods and picked out families that they knew could be easily fooled because we do not speak the same language. Our neighborhoods are full of hard-working, honest, and good-hearted families who put their trust in the wrong people without knowing it, they spoke to them in a language they did not fully understand. The little information they could glean was that they were collecting signatures and names to bring more aid and programs to our existing Hamilton school.

Now they are saying that they already have students and families Interested in their Charter school proposal, but those names were taken without permission and with deceit, lies that today we have come to publicly denounce and demand a public apology from that group that took advantage of us and that the names of our families and students be withdrawn and annulled from that supposed form of Interest. We are not interested in a new charter school in our neighborhood, especially one that is trying to get started with lies and false promises.

Febrero 14, 2023

Denuncia Publica

Hola buenas tardes a todos, mi nombre es: _____, y estoy representando al Club de Mamas de la escuela de Hamilton y al mismo tiempo represento al grupo de familias de nuestra escuela que no pudieron estar aqui por motivos de trabajo pero me han encomendado que comparta su sentir con este grupo.

Nosotros, las mas de una docena de familias que firmamos esa forma sin tener claras las intenciones de las personas que estaban recolectando nombres y firmas en nuestro vecindario. Queremos hacer una denuncia publica del engano de la que fuimos victimas hace unos meses por el grupo de personas que representan la escuela Charter Healy.

Este grupo de personas caminaron por nuestros vecindarios y escogieron a las familias que ellos sabian que podian enganar facilmente porque no hablamos el mismo idioma. Nuestros vecindarios estan llenos de familias muy trabajadoras, honestas y de buen corazon que confirmaron plenamente en las pocas palabras que pudieron entender en una conversacion que fue practicamente en Ingles, un idioma que no manejamos al 100%. La poca informacion que pudimos percibir fue que estaban recolectando firmas y nombres para traer mas ayudas y programas a nuestras ya existente escuela de Hamilton.

Ahora dicen que tienen ya estudiantes y familias interesadas en su propuesta de escuela Charter, pero esos nombres fueron tomados sin permiso y con enganos, mentiras que hoy venimos a denunciar publicamente y exigimos una disculpa publica de parte de ese grupo que tomaron ventaja de nosotros y que los nombres de nuestras familias y estudiantes sean retiradas y anuladas de esa supuesta forma de Interes. No nos interesa una nueva escuela de Charter en nuestro vecindario, especialmente una que esta tratando de empezar con mentiras y falsas promesas.

Appendix G:

Appeal Timeline

Healy School Charter Petition Appeal Timeline						
Month	Description and Statutory Dates	Statutory Dates	District and MCBE Board Dates	Assigned Staff Matrix Review Dates		Ad Hoc Meeting Dates
August	NUSD Receives Petition		8/31/2022			
October	NUSD Holds Public Hearing within 60 days	10/30/2022	10/11/2022			
November	NUSD Board Action within 90 days	11/29/2022	11/29/2022			
December	Submission of Appeal to County	Received 12/22/2022				
January	Draft Staff Review			1/6 - 2/27		1/6/2023
February	Preliminary Draft Staff Report				2/15/2023	
	Charter Ad Hoc Committee meets with Petitioner					2/17/23
	Charter Ad Hoc Committee meets with District					2/27/23
	60 days MCBE Public Hearing - Appeal to MCBE Ed Code 47605 (j)(1) MCBE Policy 2301: General Charter Policy	2/20/2023	2/14/2023			
March	Charter Ad Hoc Committee and Review Team Leads Review Staff Reports					2/27/23
	Charter Ad Hoc Committee Recommendation					2/27/23
	90 days from receipt of petition - MCBE takes Action CCR 11967(d) MCBE Policy 2301: General Charter Policy	3/22/2023	3/14/2023			

Appendix H:

Marin County Board of Education

Board Policy 2301

2000 ADMINISTRATION**2300 CHARTER SCHOOLS****2301 APPEALS OF DISTRICT DECISIONS REGARDING CHARTER SCHOOLS**

The Marin County Board of Education (MCBE) shall consider any appeal of a decision made by the governing board of a school district within the MCBE 's jurisdiction to deny a petition for the establishment of a charter school, deny the renewal of a charter, or revoke a charter that was originally authorized by the district, provided that the request for the appeal meets the requirements described below. (Education Code 47605, 47607; 5 CCR 11967)

Individuals submitting a petition on appeal should receive a copy of this MCBE Policy and MCBE Policy 2302, as well as information regarding the general content of the Memorandum of Understanding (MOU), which is typically considered at the same time as the charter proposal.

The MCBE shall request that the Marin County Superintendent of Schools or designee communicate with charter petitioners and perform a review of the petition on behalf of the MCBE and report any findings to the MCBE at a public meeting.

All meetings of the MCBE at which the appeal of a charter petition is to be discussed shall be subject to the state open meeting laws (the Brown Act). (Education Code 47608)

Appeal of District Denial of Charter Authorization or Renewal

If the governing board of a school district denies a petition for the establishment or renewal of a charter school, the petitioners may submit an appeal to the MCBE within 30 calendar days of the denial. Any petition submitted to the MCBE after this time frame shall be considered denied with no further options for administrative appeal. (Education Code 47605)

A petition to the MCBE to establish or renew a charter school that has been denied by a school district governing board shall include: (Education Code 47605; 5 CCR 11966.5, 11967)

1. A complete copy of the charter petition as denied, including, but not limited to, the signatures required by Education Code 47605 and the identification of the proposed site(s) where the charter school will operate.
2. Evidence of the school district governing board's action to deny the petition, such as meeting minutes.
3. Any written factual findings from the school district governing board setting forth specific facts to support the grounds for denial.
4. A signed certification stating that the petitioner(s) will comply with all applicable law.
5. A description of any changes to the petition necessary to reflect the MCBE as the chartering entity.

If the petition submitted on appeal contains new or different material terms, the MCBE shall immediately remand the petition to the governing board of the school district for reconsideration. If the governing board of the school district denies a petition after reconsideration, the petitioner may elect to resubmit the petition for the establishment of a charter school to the MCBE. (Education Code 47605)

Within 60 days of the receipt of the petition, the MCBE shall hold a public hearing to review documentation and obtain public input. A petition is deemed received on the day the petitioner submits a petition to the county office of education, along with a signed certification that the petitioner deems the petition to be complete (Education Code 47605).

In considering the charter petition, the MCBE is not limited to a review based solely on the reasons for denial stated by school district. The MCBE shall review and approve or deny a petition based on the criteria specified in Education Code 47605 (Education Code 47605; 5 CCR 11967), and MCBE Policy 2302.

In conducting the review of the charter petition on appeal, the Marin County Superintendent of Schools shall utilize charter petition evaluation resources, including but not limited to charter petition evaluation resources developed by the Fiscal Crisis and Management Assistance Team (FCMAT).

When considering a petition for renewal, the MCBE shall also, consider the charter school's past performance on academics, finances, and operations, along with any plans for improvement, in evaluating the school's likelihood of future success. (5 CCR 11966.5)

Following review of the petition and the public hearing, the MCBE shall either grant or deny the charter within 90 days of receipt of the petition, or within 120 days if the petitioner and MCBE agree to the extension. (Education Code 47605)

Upon approval, the Charter Schools Section of the California Department of Education, and other agencies as required by law, will be notified that the charter has been approved.

A charter school authorized by the MCBE on appeal shall be subject to the same requirements concerning geographic location to which it would otherwise be subject if it received approval from the school district to which it originally submitted its petition. (Education Code 47605, 47605.1)

A charter school authorized by the MCBE on an appeal shall operate under the provisions of its charter, relevant policies and regulations adopted by the MCBE, any memorandum of understanding (MOU) between the MCBE and the charter school, and applicable state and federal laws. The MCBE may approve one or more MOUs with the charter school to clarify the financial and operational arrangements, such as how and when the charter school will establish governing bylaws, policies, and procedures or implement additional requirements that the MCBE considers necessary for the sound operation of a charter school. Any such MOU shall be annually reviewed by the MCBE and the charter school governing body and be amended as necessary.

Any charter petition appealed to and denied by the MCBE may be submitted to the State Board of Education (SBE) within 30 days of the denial. Upon request by the petitioner, the MCBE shall prepare a documentary record, if any, of the public hearing at which the petition was denied, no later than 10 business days of the request. Within 30 days of receipt of the appeal submitted to SBE, the MCBE may submit a written opposition and supporting documentation or evidence that was considered by the

MCBE in reviewing and denying the petition. (Education Code 47605)

Denial of Petition, or Renewal, on Appeal– Findings

It is the intent of the Board that charter schools with sound educational and financial practices should be encouraged. The Board shall deny a petition only if the MCBE makes written factual findings, specific to the particular petition, setting forth specific facts to support one, or more, of the following findings:

1. The charter school presents an unsound educational program that presents a likelihood of physical, educational, or psychological harm to, or which is not likely to provide an educational benefit for the pupils who attend the school.
2. The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.
3. The petition does not contain the number of signatures required by the Code (Section 47605(a) of the Code).
4. The petition does not contain an affirmation of each of the conditions set forth in Section 47605(d) of the Code.
5. The petition does not contain reasonably comprehensive descriptions of all the information required under this policy including but not limited to section (1) of the Components of the Charter Petition of MCBE policy 2302 (Section 47605(c) of the Education Code).
6. The petition does not contain a declaration of whether or not the charter school shall be deemed the exclusive public employer of the employees of the charter school for purposes of Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code.
7. The charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposing to locate. Analysis of this finding shall include consideration of the fiscal impact of the proposed charter school. A written factual finding shall detail specific facts and circumstances that analyze and consider the factors enumerated in Education Code Section 47605(c)(7).
8. The school district denying the petition on appeal has a qualified interim certification and is not positioned to absorb the fiscal impact of the proposed charter school as defined under Education Code Section 47605(c)(8) or the denying school district has a negative interim certification pursuant to Education Code Section 42131, or is under state receivership. Charter schools proposed in a school district satisfying one of these conditions shall be subject to a rebuttable presumption of denial. (Education Code Section 47605(c)(8)).

Monitoring and Supervision

Monitoring and supervision of an approved charter school on appeal shall follow the provisions outlined in Marin County Board of Education Policy 2302.

Appeal of District Charter School Revocations

If a school district governing board revokes the charter of school it authorized, the charter school may appeal the revocation by delivering a written Notice of Appeal to the MCBE within 30 days the district's final decision. (Education Code 47607; 5 CCR 11968.5.4)

The Notice of Appeal shall include all of the following: (5 CCR 11968.5.4)

1. A copy of the district's Notice of Violation, Notice of Intent to Revoke, and the Final Decision, unless the school district did not provide them to the charter school as required pursuant to 5 CCR 11968.5.2
2. Evidence of the final vote of the school district governing board, if available
3. All evidence relied upon by the school district in determining whether substantial evidence existed that the charter school failed to remedy one or more violations identified in the Notice(s) of Violation
4. All evidence and correspondence submitted by the charter school's governing body in response to the school district's Notice of Violation and Notice of Intent to Revoke
5. Minutes of any public meeting at which the school district governing board considered or made its decision to revoke the charter, if available
6. A written statement from the charter school explaining why it does not believe that the school district's factual findings are supported by substantial evidence
7. Identification of any procedural omissions or errors the charter school alleges to have occurred in the revocation process

The MCBE shall consider the following when determining whether school district's factual findings are supported by substantial evidence: (5 CCR 11968.5.4)

1. Whether the district provided the charter school a Notice of Violation and a reasonable opportunity to remedy the identified violation(s)
2. If the charter school submitted a response to the Notice of Violation, whether the charter school complied with the procedures set forth for that response
3. Whether the district provided the charter school a Notice of Intent to Revoke, a public hearing, and Final Decision
4. Whether the school district provided the charter school a Notice of Revocation by Determination of a Severe and Imminent Threat to Pupil Health or Safety, if applicable
5. Whether an alleged procedural deficiency negatively impacted the charter school's ability to refute or remedy the alleged violation(s) or the school district's ability to comply with its procedural obligations or authorizing duties

The County Board shall provide the California Department of Education and the school district a copy of its written decision within 10 calendar days of its action. (5 CCR 11968.5.4)

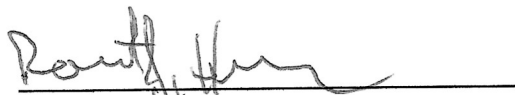
The County Board may reverse the district's decision if it determines the district's findings are not supported by substantial evidence. If the district's decision is reversed on appeal, the district shall continue to be regarded as the chartering authority. The school district may appeal the reversal to SBE. (Education Code 47607)

If the County Board does not issue a decision within 90 days of receiving the Notice of Appeal, or if the County Board upholds the district's decision to revoke the charter, the charter school may appeal to SBE. (Education Code 47607)

Miscellaneous

1. Should a charter school elect to operate as, or be operated by, a nonprofit public benefit corporation, the Board of Education may appoint a representative to serve on the board of directors of the corporation, and the corporation shall confer upon the board's appointee all rights and responsibilities exercised by any other director of the corporation.
2. A charter school shall promptly respond to all reasonable inquiries from the Marin County Office of Education.
3. The Marin County Superintendent of Schools is charged with developing such administrative regulations or petition review guidelines as may be necessary or prudent to implement this policy.

Approved as to form:


Robert J. Henry, MCOE Legal Counsel

Approved by the Marin County Board of Education: June 10, 2003

Approved by the Marin County Board of Education: November 18, 2008

Approved by the Marin County Board of Education: December 11, 2012

Approved by the Marin County Board of Education: November 18, 2014

Approved by the Marin County Board of Education: January 10, 2023

Federal

20 USC 7223-7225
34 CFR 200.1-200.79

Description

Charter schools
Accountability

Management Resources

Attorney General Opinion
Attorney General Opinion

Description

80 Ops.Cal.Atty.Gen. 52 (1997)
78 Ops.Cal.Atty.Gen. 297 (1995)

State

5 CCR 11960-11969.10
Ed. Code 220
Ed. Code 47600-47616.7
Ed. Code 60600-60648.5
Gov. Code 3540-3549.3
Gov. Code 54950-54963

Description

Charter schools
Prohibition of discrimination
Charter Schools Act of 1992
Assessment of academic achievement
Educational Employment Relations Act
The Ralph M. Brown Act

Appendix I:
Marin County Board of Education
Board Policy 8422

8000 COUNTY BOARD OF EDUCATION

8400 ORGANIZATION

8420 COMMITTEES

8422 AD HOC COMMITTEES AND BOARD REPRESENTATIVES

The President, with the approval of the Board, may appoint Ad Hoc Committees composed only of members of the Board to investigate and report on assigned problems and serve until discharged by the Board.

1. No more than three (3) members shall be assigned to an Ad Hoc Committee. If more than three (3) members wish to serve, the committee shall be deemed to be a committee of the whole and will conduct its meetings pursuant to the Brown Act.
2. The Superintendent or his/her designee may attend meetings in order to serve as secretary of all committees.

Board members may also be assigned as Board representatives to other groups.

Committee and Board representative assignments may be established by the President, with the approval of the members concerned, at the annual organization meeting.

References: Education Code 1040(a)
Government Code 54952

Approved as to form:

Allyce McBratney
Deputy County Counsel

Approved by
Marin County Board of Education - 9/26/89
Revised - 5/10/94