



## **Allocation of Funds to New and Expanding Charter Schools**

### **Charter School Criteria Requirements**

**Please provide response for each criterion.**

The ESEA definition of charter school, Section 10310(1) of the ESEA (20 U.S.C. 8066(1)), defines a charter school as a public school that --

In accordance with a specific State statute authorizing the granting of charters to schools, is exempted from significant State or local rules that inhibit the flexible operation and management of public schools, but not from any rules relating to the other requirements of this paragraph;

1. Is the charter school created by a developer as a public school, or is adapted by a developer from an existing public school, and is operated under public supervision and direction? Please indicate which criteria apply to your charter school.
  
2. Does the charter school operate in pursuit of a specific set of educational objectives determined by the school's developer and agreed to by the authorized public chartering agency? Please briefly describe the educational objectives.
  
3. Does the charter school provide a program of elementary or secondary education, or both?
  
4. Is the charter school nonsectarian in its programs, admissions policies, employment practices, and all other operations, and is not affiliated with a sectarian school or religious institution?

5. Does the charter school charge tuition?
6. Does the charter school compile with the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Part B of the Individuals with Disabilities Education Act? Is this expressly stated in the Charter School policies?
7. How does the charter school, a school to which parents choose to send their children admit students if more students apply for admission than can be accommodated?
8. Does the charter school agree to comply with the same Federal and State audit requirements as do other elementary and secondary schools in the State, unless such requirements are specifically waived for the purpose of this program?
9. Does the charter school meet all applicable Federal, State, and Local health and safety requirements?
10. Does the charter school operate in accordance with State Law?
11. Does the charter school have a written performance contract with the authorized public chartering agency in the State that includes a description of how student performance will be measured in charter schools pursuant to **State assessments** mutually agreeable to the authorized public chartering agency and the charter school?

A charter school must meet each element of this definition in order to receive funds under a covered program in accordance with the final regulations, 34 CFR §76.787.

*Oklahoma State Department of Education  
Titles I, II, VI and X  
Ramona Coats, Assistant State Superintendent  
Gloria Bayouth, Executive Director*

## **Charter School Eligibility Responsibility for Federal Programs**

- ✓ A charter school that is opening for the first time or significantly expanding its enrollment must notify the responsible State in writing, at least **120 days** in advance, of the date the charter school is scheduled to open or expand.

Date Charter School notified Oklahoma State Department of Education \_\_\_\_\_

- ✓ Charter school **must** set up meeting with Oklahoma State Department of Education Titles I, II, VI and X Office for technical support.
- ✓ A charter school **must** establish its eligibility to receive funds under the particular program and comply with all program requirements. A charter school must establish a Targeted Assistance Plan and establish assessments used to identify at risk students. Please see SDE website <http://sde.state.ok.us/NCLB/Title1PartA.html> and scroll down to lower portion of page under Title IA, Targeted Assistance Program for Components and Template of Title IA Targeted Assistance Plan. Please submit completed plan to:

Oklahoma State Department of Education  
ATTN: Dr. Gloria Bayouth  
Office of Titles I, II, VI and X  
2500 North Lincoln Blvd.  
Oklahoma City, OK 73105-4599

- ✓ Charter Schools are required to attend an application training session with Federal Programs. Please contact 405-521-2846 to schedule training.
- ✓ A charter school that has not yet opened or expanded **must provide** Oklahoma State Department of Education with any data or information available to the charter school that the State may reasonably need to **estimate** the amount of funds the charter school will be eligible to receive when it actually opens or expands.
  - Provide estimated economically disadvantaged (185% poverty) count, (130% poverty) count, and total population age 5-17.
  - If not using the Free lunch program please review documentation at end of packet on how to determine economically disadvantaged.
  - If using the free lunch program, provide the free lunch, reduced lunch, and 5-17 population.
  - Identify each group and from what sending county and district they came from.
  - Please see example on population template.

Sample template:

[illegible]

- ✓ Once a charter school actually opens or expands, **it must provide** actual enrollment and eligibility data to the State.
  - Provide economically disadvantaged (185% poverty) count, (130% poverty) count, and total population age 5-17.
  - If not using the Free lunch program please review documentation at end of packet on how to determine economically disadvantaged.
  - If using the free lunch program, provide the free lunch, reduced lunch, and 5-17 population.
  - Identify each group and from what sending county and district they came from.
  - Please see example above on population template.
  - Please provide actual enrollment data no more than two weeks after school starts.

Please provide date Charter School is expected to open: \_\_\_\_\_

The Charter School Representative is agreeing that all information provided is correct and transfer paperwork has been completed on all student counts provided to OSDE. Charter is responsible for providing copies of transfer paperwork if necessary.

Charter School Representative Name: \_\_\_\_\_ Date: \_\_\_\_\_

Charter School Representative Email address: \_\_\_\_\_

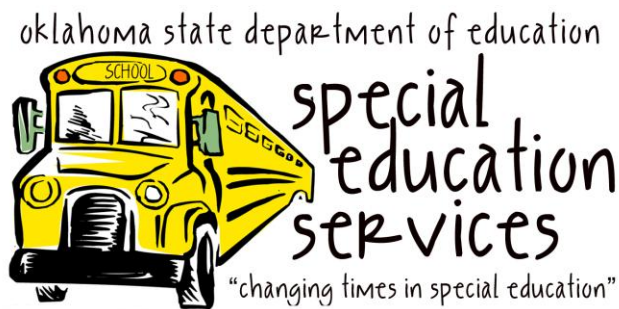
Charter School Representative Signature: \_\_\_\_\_

Sponsor Superintendent Name: \_\_\_\_\_ Date: \_\_\_\_\_

Sponsor Superintendent Email address: \_\_\_\_\_

Sponsor Superintendent Signature: \_\_\_\_\_

Please complete this form and fax to (405-521-2998) or email to Tina.Dewey@sde.ok.gov



*Dr. Rene Axtell, Assistant State Superintendent, Special Education Services*  
*Anita Eccard, Associate State Director*

## Charter School Responsibility for Individuals with Disabilities Education Act (IDEA) Part B

Agencies responsible for special education and related services must abide by Oklahoma State law, policies and procedures, and the federal regulations for the IDEA Part B. Agencies having these responsibilities are: local educational agencies (LEA), educational service agencies (ESA), **public charter schools** not otherwise included as LEAs or ESAs, other public agencies (e.g., State schools for students with deafness and blindness and State and local juvenile and adult correctional facilities), and accredited private schools and facilities as described in the applicable federal regulations and established by Oklahoma State laws (**34 CFR § 300.12**)

Each LEA (including a charter school) must make available, upon request, information needed by the State Education Agency (SEA) to meet the requirements of the IDEA. In addition, each LEA must, upon request, provide information to the public regarding the eligibility of the LEA for the IDEA Part B funds. The LEA must also cooperate in any efforts to aid in the transfer of records for migratory children. The LEA must assure that it will make available to parents of children with disabilities and to the general public all documents relating to the eligibility of the agency under the IDEA Part B.

### **Expending Funds**

Each local educational agency (LEA) receiving federal IDEA Part B funds must expend those funds in accordance with the federal regulations which appear in the *Special Education Funding Manual for IDEA Part B*. The *Special Education Funding Manual for IDEA Part B* is a technical assistance document for use by LEAs in implementing the funding requirements of the IDEA Part B. Within the *Part II, IDEA Part B LEA Application for Federal Special Education Funds*, each LEA receiving funds must assure that those funds are used only to pay the excess costs of providing special education and related services to children with disabilities. Each LEA must also assure that the funds are used to supplement, not supplant, State and local funds. All employees paid with federal funds must maintain time and effort reports. All IDEA Part B funds are available on a claims reimbursement basis.

## **What you Need to Know**

- ✓ A charter school that is opening for the first time or significantly expanding its enrollment must notify the OSDE in writing, at least **120 days** in advance of the date the charter school is scheduled to open or expand.
- ✓ A Charter school **must** meet with an OSDE IDEA Part B Finance Coordinator for technical support. Contact Ms. Pam Kimery, (405) 522-3246, to schedule an appointment.
- ✓ A charter school **must** establish its eligibility to receive funds under the particular program and comply with all program requirements. Please see the OSDE Web site at <[www.sde.state.ok.us/Curriculum/SpecEd/Finance.html](http://www.sde.state.ok.us/Curriculum/SpecEd/Finance.html)> for the current Finance Manual and other important information.
- ✓ A charter school that has not yet opened or expanded **must provide** the OSDE with any data or information available to the charter school that the State may reasonably need to **estimate** the amount of funds the charter school will be eligible to receive when it actually opens or expands.
  - Provide estimated student free and reduced lunch count age 3-21.
  - Identify each **free/reduced lunch** student (count) from each sending county and district.
  - Provide student population age 3 – 21.
  - Identify each student (count) from each sending county and district.
  - Provide IDEA student population age 3 – 21.
  - Identify each IDEA student (count) from each sending county and district.

**Sample Template:**

Site Name: \_\_\_\_\_

<b>3 – 21 Free Lunch Enrollment</b>	<b>3 -21 Reduced Lunch Enrollment</b>	<b>Total Site Enrollment 3 – 21 Population</b>



If the Charter School LEA is not using the free or reduced lunch program please attach documentation on how the LEA determined the poverty data.

\*Once a charter school actually opens or expands, **it must provide** actual enrollment and eligibility data to the State.

**Sample template:**

Site Name: \_\_\_\_\_

Total Site Enrollment 3-21 Population		Total Site Enrollment of children on Individual Education Programs (IEP)	
<b>IDEA Part B - Please enter data for <u>Child Count</u></b>			
<i>If the Charter School LEA has students who are receiving Special Education services or related services and are currently on an IEP, please enter the student information below:</i>			
Student Name	Student Birthdate	Sending* County Name	Sending* District Name
Add more rows as necessary			
*Sending county and district is the county and district that the student would have attended.			

\*Once a charter school actually opens or expands, **it must provide** actual enrollment and eligibility data to the State.

- ✓ Send all required documentation as specified to:

Oklahoma State Department of Education  
ATTN: Ms. Anita Eccard  
Special Education Services  
Suite 412  
2500 North Lincoln Blvd.  
Oklahoma City, OK 73105-4599

- ✓ Complete Assurances on the OSDE District Reporting Site by July 1 of the appropriate fiscal year.
- ✓ Complete LEA Agreement by July 1 Assurances on the OSDE District Reporting Site by July 1 of the appropriate fiscal year.
- ✓ Complete the IDEA Part B Budget Application by the fourth Friday of September Assurances on the OSDE District Reporting Site by July 1 of the appropriate fiscal year.
- ✓ Identify **each student** (count) from each sending county and district.

The Charter School Representative is agreeing that all information provided is correct and transfer paperwork has been completed on all student counts provided to OSDE. Charter is responsible for providing copies of transfer paperwork if necessary.



Charter School Representative Name: \_\_\_\_\_ Date: \_\_\_\_\_

Charter School Representative Email address: \_\_\_\_\_

Charter School Representative Signature: \_\_\_\_\_

Sponsor Superintendent Name: \_\_\_\_\_ Date: \_\_\_\_\_

Sponsor Superintendent Email address: \_\_\_\_\_

Sponsor Superintendent Signature: \_\_\_\_\_

**Please complete the contact information and signature above and mail to:**

Oklahoma State Department of Education  
ATTN: Ms. Anita Eccard  
Special Education Services  
Suite 412  
2500 North Lincoln Blvd.  
Oklahoma City, OK 73105-4599

or email to [Anita.Eccard@sde.ok.gov](mailto:Anita.Eccard@sde.ok.gov)

## ECONOMIC DISADVANTAGED APPLICATION

<b>LIST ALL HOUSEHOLD MEMBERS</b>				
Names of ALL Household Members (First, Middle Initial, Last)	Name of School for Each Child or Indicate NA If Person is not in School			Grade (If Applicable)
<b>TOTAL HOUSEHOLD GROSS INCOME</b>				
<b>A. NAME</b> (List only household members with income)	<b>B. GROSS INCOME AND HOW OFTEN IT WAS RECEIVED</b>			
	Earnings from Work Before Deductions	Welfare, Child Support, Alimony	Pensions, Retirement, Social Security, SSI, VA	All Other Income
<i>(Example) Jane Smith</i>	\$199.99 / week	\$149.99 / every other week	\$99.99 / monthly	\$50 / monthly
<b>SIGNATURE</b> <i>I certify (promise) that all information on this application is true and that all income is reported.</i>  <b>Sign Here:</b> _____  <b>Print Name:</b> _____  <b>Date:</b> _____				
<b>DO NOT FILL OUT THIS PART. THIS IS FOR OFFICIAL USE ONLY.</b>				
Annual Income Conversion: Weekly x 52, Every 2 Weeks x 26, Twice Monthly x 24, Monthly x 12 <b>INCOME ELIGIBILITY:</b> Total Income: _____ Per: Week <input type="checkbox"/> Every 2 Weeks <input type="checkbox"/> Twice a Month <input type="checkbox"/> Month <input type="checkbox"/> Year <input type="checkbox"/> Household Size: _____ Economically Disadvantaged: 130% of Poverty <input type="checkbox"/> 185% of Poverty <input type="checkbox"/> No <input type="checkbox"/>				

## INCOME-ELIGIBILITY GUIDELINES FOR SCHOOL YEAR 2013

This is the income scale used by \_\_\_\_\_

(School Food Authority)

130 Percent of Poverty Level					
Household Size	Income				
	Annual	Monthly	Twice Per Month	Every Two Weeks	Weekly
1	14,521	1,211	606	559	280
2	19,669	1,640	820	757	379
3	24,817	2,069	1,035	955	478
4	29,965	2,498	1,249	1,153	577
5	35,113	2,927	1,464	1,351	676
6	40,261	3,356	1,678	1,549	775
7	45,409	3,785	1,893	1,747	874
8	50,557	4,214	2,107	1,945	973
For each additional family member, add:	5,148	429	215	198	99

185 Percent of Poverty Level					
Household Size	Income				
	Annual	Monthly	Twice Per Month	Every Two Weeks	Weekly
1	20,665	1,723	862	795	398
2	27,991	2,333	1,167	1,077	539
3	35,317	2,944	1,472	1,359	680
4	42,643	3,554	1,777	1,641	821
5	49,969	4,165	2,083	1,922	961
6	57,295	4,775	2,388	2,204	1,102
7	64,621	5,386	2,693	2,486	1,243
8	71,947	5,996	2,998	2,768	1,384
For each additional family member, add:	7,326	611	306	282	141