

# LAKE MOUNTAIN SCHOOL DISTRICT

## Charter School Authorizer Transfer Request Process

### INTRODUCTION

This document provides procedural direction to existing charter school boards and leadership in formally requesting transfer of their charter to Lake Mountain School District and to have Lake Mountain serve as their authorizer. This is based on the USBE Administrative Rule [R277-552-8](#). The section of the rule specific to requesting a change in authorizer is provided at the end of this document.

### CRITERIA

Lake Mountain Board of Education is willing to consider requests for the transfer of authorizer that meet the following criteria:

- Charter School is located in Lake Mountain School District

### PROCESS

As outlined in USBE Administrative Rule R277-552-8, the requesting charter school must complete the following steps:

1. Submit a written request that includes the following:
  - a. the name and location of the charter school;
  - b. the name and contact information of all current governing board members.
2. Submit the following documents:
  - a. financial records that demonstrate the charter school's financial position, including the following:
    - i. most recent annual financial report (AFR);
    - ii. annual program report (APR); and
    - iii. audited financial statements;
  - b. test scores for at least the last 5 years, including all state required assessments; (if a school has been in operation less than 5 years, all test scores must be submitted)
  - c. current employees and assignments;
  - d. board minutes for the most recent 12 months;
  - e. affidavits, signed by all board members certifying:
    - i. the charter school's compliance with all state and federal laws and regulations, including documentation if requested;
    - ii. all information on the transfer application is complete and accurate;
    - iii. the charter school is current with all required charter school governing board policies;
    - iv. the charter school is operating consistent with the charter school's charter agreement;
    - v. the charter school has met all financial reporting and audit requirements;and

- vi. the charter school has no pending corrective action plans (CAP) either financially or academically; and
  - f. description of any corrective or disciplinary actions they have received in the past and resolution of those actions.
  - g. documentation of any outstanding lawsuits, judgments, or liens against the charter school.
- 3. Request the current authorizer and Board of the requesting charter school submit to Lake Mountain Board of Education a position statement addressing the following:
  - a. the charter school's status;
  - b. the compliance with the charter school authorizer requirements;
  - c. the academic performance of the charter school
  - d. the financial status of the charter school (specify any existing debt to the current authorizer and/or the state); and
  - e. any other unresolved concerns.
- 4. Facilitate an on-site school visit by Lake Mountain Board of Education representatives. The visit will include:
  - a. Meetings
    - i. Full Charter School Board
    - ii. Faculty
    - iii. Staff
      - 1. General
      - 2. Leadership (principal/director etc.)
      - 3. Financial officer
      - 4. Academic Leader
    - iv. Parents
  - b. Tour of the facilities
  - c. Final Meeting with Charter School Leadership

#### **ADDITIONAL INFORMATION**

- Any application for change in authorizer will extend to all satellite schools of the requesting charter school.
- An application for a change in authorizer must be received 90 before a proposed change.
- The Lake Mountain Board of Education/Staff will review the application for requesting a change in authorizers within 60 days of receiving the complete application, including all required documentation).
- Lake Mountain Board of Education/Staff will request input from the State Superintendent and the State Board of Education in regard to the charter schools academic and financial performance.
- If the application is approved, Lake Mountain Board of Education/Staff will notify the State Superintendent of the change in authorizer.

**R277-552-8 – PROCEDURES AND TIMEILINES TO CHANGE CHARTER SCHOOL AUTHORIZERS**

- (1) A charter school may transfer to another charter school authorizer.
- (2) A charter school shall submit an application to the new charter school authorizer at least 90 days prior to the proposed transfer.
- (3) The charter school authorizer transfer application shall include:
  - (a) the name and contact information of all current governing board members;
  - (b) financial records that demonstrate the charter school's financial position, including the following: (i) most recent annual financial report (AFR); (ii) annual program report (APR); and (iii) audited financial statements;
  - (c) test scores, including all state required assessments;
  - (d) current employees and assignments;
  - (e) board minutes for the most recent 12 months; and
  - (f) affidavits, signed by all board members certifying: (i) the charter school's compliance with all state and federal laws and regulations, including documentation if requested; (ii) all information on the transfer application is complete and accurate; (iii) the charter school is current with all required charter school governing board policies; (iv) the charter school is operating consistent with the charter school's charter agreement; and (v) there are no outstanding lawsuits, judgments, or liens against the charter school.
- (4) The current authorizer of a charter school seeking to transfer charter school authorizers shall submit a position statement to the new charter school authorizer about:
  - (a) the charter school's status;
  - (b) compliance with the charter school authorizer requirements; and
  - (c) unresolved concerns.
- (5) If a school applies to change authorizer's, the existing authorizer shall advise the proposed authorizer if there is any outstanding debt to the existing authorizer or the state.
- (6) If a school applies to change authorizers, the request shall extend to all satellite schools.
- (7) A new charter school authorizer shall review an application for transferring to another charter school authorizer within 60 days of submission of a complete application, including all required documentation.
- (8) Prior to accepting a charter school's transfer from another authorizer, the new authorizer shall request and consider information from the Board and current authorizer concerning the charter school's financial and academic performance. (9) The Superintendent and current authorizer shall provide the information described in Subsection (7) to a new charter authorizer within 30 days of request described in Subsection (7).
- (10) If an authorizer accepts the transfer of a charter school, the new authorizer shall notify the Superintendent within 30 days.