

January 27, 2026

Recommendation:

The Charter Review Team for Hayward Unified School District has reviewed the renewal petition for Hayward Twin Oaks Montessori Charter School. The recommendation is to approve the petition for a five-year term based on the school’s overall performance meeting the renewal criteria outlined in California Education Code sections 47607 and 47607.2, including demonstrated academic performance at the middle range, operational stability, and the capacity to continue implementing its educational program in compliance with applicable legal, fiscal, and governance requirements.

Charter Petition Evaluation Rubric

School Name: Hayward Twin Oaks Montessori School

Charter Performance Category: Middle Tier

Reviewer Name: Mr. Kwasi Reed, Alternative Education Director, Hayward USD

Submission Date: November 25, 2025

1st Public Hearing: January 14, 2026

2nd Public Hearing (Action Meeting): February 11, 2026

[HTOMS Website](#)

[HTOMS Dashboard](#)

[Hayward Unified Performance Overview](#)

This template is designed to guide review of charter school petitions. Throughout the evaluation, you are asked to rate the response as *Inadequate*, *Approaches*, *Meets* or *Excels*:

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Criteria for each section define the qualities of an “Excels” response in relation to the specific topic.

In addition, the following rating definitions should guide your assessment:

Inadequate: The response lacks meaningful detail; demonstrates lack of preparation; or otherwise raises substantial concerns about the petitioner’s understanding of the issue in concept and/or ability to meet the requirement in practice.

Approaches: The response addresses most of the selection criteria, but lacks some meaningful detail and requires important additional information in order to be reasonably comprehensive.

Meets: The response indicates solid preparation and grasp of key issues that would be considered reasonably comprehensive. It contains many of the characteristics of a response that excels even though it may require additional specificity, support or elaboration in places.

Excels: The response reflects a thorough understanding of key issues and indicates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

At the end of each section, you will identify “Criteria Satisfied” and “Criteria Not Sufficiently Addressed, Concerns & Additional Questions.” Those sections allow you to explain and elaborate on your ratings. Your comments are essential to staff’s understanding of your assessment. Your questions and comments are relevant to subsequent capacity interviews, public hearings and internal deliberations.

EVALUATION INSTRUCTIONS

The evaluation has four Parts corresponding to key aspects of the petition:

- I. Executive Summary**
- II. Educational Program**
- III. Petitioner Capacity**
- IV. Fifteen Elements**

Each Part is divided into sections addressing key provisions of the Charter Schools Act and the quality of a charter petition.

IMPORTANT:

- Read the relevant section of the petition.
- Read the evaluation criteria and mark the box that best fits your assessment of the response (*Inadequate, Approaches, Meets* or *Excels*).
- In those instances where the criteria are *bulleted*, you are expected to evaluate the criteria as a whole. In those instances where the criteria are *numbered*, you are expected to evaluate each criterion individually.
- For Parts II-IV, use the “Criteria Satisfied” text box to identify key strengths. Reference specific sections and page numbers.
- For Parts II-IV, use the “Criteria Not Sufficiently Addressed, Concerns & Additional Questions” text box to identify key concerns and to identify questions that are important to getting a full understanding of the plan. Reference specific sections and page numbers.
- For Parts II-IV, use the “Summary” boxes at the end to highlight the key strengths and concerns that you have for that Part of the petition as a whole.

NOTE: Many charter applications may not likely follow the format or sequence of this rubric. In many instances it will be necessary to review multiple sections of the petition before returning to the rubric to assess one of the following areas identified for evaluation.

I. EXECUTIVE SUMMARY

NOTE: *An Executive Summary is NOT a legally required element of a charter petition and therefore may not be specifically identified in the charter petition. However the petition must include a description of what it means to be an educated person in the 21st century, and how learning best occurs.” In addition, the petition must include the objective of “enabling pupils to become self-motivated, competent, and lifelong learners.”*

The Executive Summary provides a comprehensive overview of the proposed plan. The Executive Summary should present the school’s mission, vision, values and school educational philosophy. An Executive Summary that excels will articulate the following:

- A Mission Statement that is clear and compelling; focuses on improving educational outcomes; and establishes a set of priorities that are meaningful, manageable and measurable;
- A Vision Statement that describes a student’s daily experience at the school including rituals, expectations, and co-curricular activities;
- A defined **Educational Philosophy and Approach** – including what it means to be an “educated person” in the 21st Century and how learning best occurs– that is aligned with the mission statement, proven effective for the target population and applicable to varied teaching and learning styles (§ 47605(b)(5)(A) (Element 1);
- The goals identified in the educational program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners; and
- An organizational team that is diverse, supportive and committed to advancing the mission of the proposed school.

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

HUSD Staff Summary:

The Executive Summary for Hayward Twin Oaks Montessori School provides a comprehensive and well-organized overview of the proposed educational program and clearly articulates the school’s mission, vision, values, and Montessori-based educational philosophy. The mission statement is clear, compelling, and focused on improving educational outcomes by nurturing lifelong learners, global citizens, and environmental stewards, while establishing meaningful and measurable priorities centered on college and career preparation.

The vision statement effectively describes the student experience, emphasizing individualized and collaborative mastery learning, social responsibility, leadership development, and the school’s core values reflected through the GRACE framework. The educational philosophy is clearly defined, grounded in the Montessori model, and aligned with the mission. It articulates what it means to be an educated person in the 21st century by emphasizing self-motivation, adaptability, critical thinking, and community stewardship, and demonstrates applicability to varied learning styles and diverse student needs.

The Executive Summary highlights strong academic outcomes, growth trends, and postsecondary readiness indicators, reinforcing the effectiveness of the school’s approach for its target population. The goals of developing self-motivated, competent, and lifelong learners are evident throughout the program

description. Additionally, the summary reflects an experienced, accredited, and mission-driven organizational structure committed to advancing the school’s vision and sustaining program quality.

II. EDUCATIONAL PROGRAM

Statutory References:

E.C. § 47605(b)(1)

E.C. § 47605(b)(5)(A)-(C)

The education program should tell you who the school expects to serve; what the students will achieve; how they will achieve it; and how the school will evaluate performance. It should give you a clear picture of what a student who attends the school will experience in terms of educational climate, structure, materials, schedule, assessment and outcomes.

A. TARGET POPULATION

A description of the Target Population excels if it has the following characteristics:

- Coherent description of the students the school expects to serve based on understanding of the district population and the location in which the school expects to operate;
- Demonstrated understanding of the educational needs of the target population; and
- Explanation of how the mission and vision align with the needs of the target population.

TARGET POPULATION

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: TARGET POPULATION

If Meets or Excels; <i>Strengths</i>	Reference (pg. #s refer to original petition)	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
<p>The charter renewal petition for Hayward Twin Oaks Montessori School presents a coherent and well-defined description of the students and families the school intends to serve. Twin Oaks identifies its target population as students in grades 1–12 from Hayward and the greater East Bay Area who seek a free, public Montessori education.</p> <p>The petition demonstrates an understanding of the district’s diverse demographic profile, including students from varied racial, cultural, socioeconomic, linguistic, and ability backgrounds, and positions the school as a unique educational option within the region.</p>	Pg. 32-34	<p>Although enrollment trends are provided, the narrative does not consistently connect the needs of specific student subgroups (e.g., English Learners, students with disabilities, socioeconomically disadvantaged students) to differentiated outcomes or targeted strategies within the educational program.</p> <p>Community demand is supported through enrollment growth,</p>	

<p>The petition reflects an understanding of the educational needs of this population, emphasizing inclusion, acceptance, community stewardship, and the development of active, informed citizens. Enrollment and demographic data demonstrate that Twin Oaks serves meaningful proportions of English Learners, students with disabilities, and socioeconomically disadvantaged students, with growth in several of these student groups over time. High enrollment demand, strong retention, stability rates exceeding district and state comparisons, and positive survey results further indicate that the school’s program is responsive to community needs.</p>		<p>retention, and survey results; however, the narrative relies largely on general indicators of satisfaction rather than clearly articulated academic or programmatic gaps that Twin Oaks uniquely addresses.</p>	
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B. PHILOSOPHY AND APPROACH TO INSTRUCTION

A description of the Educational Philosophy and Approach to Instruction excels if it has the following characteristics:

1. **Rationale:** *Is the rationale compelling?*
 - A compelling rationale with a clear foundation in research-based educational practices, teaching methods and/or high standards for student learning;
2. **Mission Alignment:** *Do the philosophy and approach align with the mission and vision?*
 - Alignment with mission and vision; and
3. **Population Alignment:** *Does sound reasoning or evidence indicate that the target population is likely to benefit?*
 - Persuasive explanation of why the philosophy and approach are appropriate for and likely to result in improved educational performance for the target population, including any available performance data from use of the same educational philosophy and approach to instruction with similar populations.

1. Rationale: *Is the rationale compelling?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

2. Mission Alignment: *Do the philosophy and approach align with the mission and vision?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

3. Population Alignment: *Does sound reasoning or evidence indicate that the target population is likely to benefit?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: EDUCATIONAL PHILOSOPHY AND APPROACH TO INSTRUCTION

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
<p>The rationale is philosophically strong and developmentally grounded. The inclusion of extended instructional minutes and protected professional development time supports implementation fidelity; however, the narrative relies more on general theory and descriptive practice than on cited research or outcome-based evidence directly linked to instructional design and time use.</p> <p>Instructional practices, whole-child support, and the academic schedule align clearly with the school’s mission to develop lifelong learners, global citizens, and socially responsible individuals. The calendar structure reinforces the mission by prioritizing teacher learning and collaboration as a lever for student success.</p> <p>The Montessori model, combined with extended instructional minutes and consistent professional development, is suited to supporting diverse learners. The schedule allows for differentiated instruction, individualized pacing, and educator collaboration—key components for serving English Learners, students with disabilities, and socioeconomically disadvantaged students.</p>		<p>.While grounded in established educational theory, the petition does not reference specific empirical studies or peer-reviewed research validating Montessori effectiveness in comparable public charter contexts.</p> <p>Performance data demonstrating success are referenced generally but are not consistently tied back to specific instructional practices within the philosophy narrative.</p>	

C. CURRICULUM FRAMEWORK

The description of the curriculum should provide the reviewer with a sense not only of *what* the school will teach but also of *how* and *why*. It must present research, applicant experience and/or reasoning sufficient to convince the reviewer that the applicants have already made sound educational decisions.

A description of the Curriculum Framework excels if it has the following characteristics:

Mark this box and complete this part, on behalf of the curriculum that has already been selected/developed:

1. **Alignment:** *Is the selection well-reasoned and aligned with the mission, state standards and student needs?*
 - A clear description of the framework and research, experience and/or sound reasoning that demonstrates alignment with the school’s mission, state standards and anticipated student needs;
2. **Implementation:** *Does the plan demonstrate the resources, scheduling and professional support needed for effective implementation?*

- An implementation plan showing persuasively the resources, daily schedule, annual calendar and professional development that support effective implementation; and
 - A clear description of the manner in which the school will prioritize the implementation of those elements of the proposed educational program that will ensure likely achievement of the goals of the program;
- 3. Evaluation:** *Does the school have strategies to evaluate effectiveness and respond when student performance falls short of goals?*
- Effective strategies for evaluating the effectiveness of implementation and responding when student performance falls short of goals.
- 1. Alignment:** *Is the selection well-reasoned and aligned with the mission, state standards and student needs?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

- 2. Implementation:** *Does the plan demonstrate the resources, scheduling and professional support needed for effective implementation?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

- 3. Evaluation:** *Does the school have strategies to evaluate effectiveness and respond when student performance falls short of goals?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

ANALYSIS: CURRICULUM FRAMEWORK

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
Twin Oaks demonstrates a clear commitment to serving a diverse student population, including students who qualify for free or reduced-price meals, English Learners, and students with disabilities. The Charter School provides a comprehensive set of staffing supports, differentiated instructional practices, and student-facing interventions designed to promote access, inclusion, and academic growth within the general	pg.41-65	<p>The section describes numerous interventions and staffing supports but does not clearly explain how the school evaluates their effectiveness or determines when adjustments are needed.</p> <p>Differentiation is emphasized philosophically; however, the framework would benefit from more concrete examples of instructional differentiation tied to specific learner needs and performance indicators.</p> <p>The section describes numerous interventions and staffing supports but does not clearly explain how the school evaluates their effectiveness or determines when adjustments are needed.</p>	Pg. 63-66

education setting. The narrative reflects a culture of collaboration, shared accountability, and data-informed decision-making. However, while supports are robust and well described, this section would benefit from clearer articulation of effectiveness measures and outcome data tied to specific student groups.			
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D. SPECIAL POPULATIONS: SPECIAL EDUCATION

Federal law requires charter schools, like all public schools, to provide a free appropriate education in the least restrictive environment to students identified with disabilities who are enrolled at the school. A plan for serving students with disabilities excels if it has the following characteristics:

- Demonstrated understanding of state and federal special education requirements including the fundamental obligation to provide a free, appropriate education to students identified with disabilities and obligations held under Section 504 of the ADA;
- A clear statement regarding what petitioners expect will be the school’s anticipated LEA status for purposes of special education and the implications of that status determination;
- A sound plan -- including lead contact, funding, service and intervention arrangements -- for identifying and meeting the needs of students identified with disabilities;
- Alignment of the special education plan with the core educational program; and
- Evidence of high expectations for students with special needs.

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: SPECIAL EDUCATION

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
HTOMS demonstrates a clear and accurate understanding of state and federal requirements under IDEA, Section 504, ADA, and Child Find, including the obligation to provide FAPE in the LRE. HTOMS functions as an independent LEA and maintains active membership in a state-approved SELPA, with clear notification, fiscal responsibility, and compliance protocols.	504 pg. 67-68	The model relies heavily on coordination among general educators, specialists, tutors, and external providers; continued attention to staffing stability, caseload management, and succession planning is warranted as enrollment and service needs fluctuate. While instructional strategies and tools are clearly described, more explicit documentation of program	Pg. 57

		evaluation cycles (e.g., formal reviews of intervention effectiveness and instructional impact) would strengthen accountability and continuous improvement efforts.	
<p>The Montessori instructional model is aligned with inclusive practices, emphasizing individualized learning, mixed-age classrooms, flexible pacing, and differentiated instruction.</p> <p>Students with disabilities are educated primarily in general education settings with push-in and pull-out support as appropriate, reinforcing LRE principles and high expectations.</p> <p>Clear 504 identification, evaluation, documentation, accommodation, monitoring, and annual review processes are articulated, with defined team membership and procedural safeguards.</p>	pg 67-74	<p>As an independent LEA HTMOS is fully responsible for special education costs, the school faces potential fiscal risk related to high-cost services, legal proceedings, or non-public placements, which should continue to be proactively monitored and planned for.</p> <p>Given the breadth of services described across elementary and secondary levels, ongoing monitoring is needed to ensure consistent implementation fidelity, particularly during student transitions between programs.</p>	

E. SPECIAL POPULATIONS: ENGLISH LANGUAGE LEARNERS

Federal law requires charter schools, like all public schools, to meet the needs of English language learners by helping them gain English proficiency and also make progress in all academic subjects. A plan for serving English language learners excels if it has the following characteristics:

- Demonstrated understanding of the likely English language learner population;
- A sound approach to identifying and meeting the needs of English language learners tailored to the anticipated population;
- A sound approach to helping English language learners fulfill expectations of the core educational program, including a lead contact and intervention process; and
- Evidence of high expectations for English language learners.

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: ENGLISH LANGUAGE LEARNERS

If Meets or Excels; <i>Strengths</i>	Refer ence	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Ref ere nce
The Charter School meets all legal requirements related to English Learner identification, assessment, instruction, monitoring, parent notification, reclassification, and post-reclassification monitoring. Clear procedures are in place	Pgs. 58-62		

<p>for administration of the Initial and Summative ELPAC, data review, instructional placement, and reporting.</p> <p>The instructional program for English Learners is well aligned with the Montessori model and incorporates both integrated and designated ELD instruction. The school employs a range of research-based strategies, including scaffolding, flexible grouping, small group instruction, tutoring support, technology-based interventions, and culturally responsive practices. Students have full access to the general education program while receiving targeted language support.</p>			
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F. PUPIL OUTCOMES

Pupil outcomes are central to the school’s existence. They represent the school’s definition of success and should drive all aspects of the program and operation. A description of Pupil Outcomes excels if it has the following characteristics:

1. **Alignment:** *Do the objectives align with the mission and vision?*
 - o Educational objectives aligned with the mission, vision and educational program;
2. **Measurement:** *Are the goals clear, specific and measurable?*
 - o Multiple performance measures applied to student learning objectives.
 - o Measures include performance goals based on absolute (e.g., proficiency levels), relative (e.g., comparison schools) and individual gains (e.g., year-to-year matched student cohort gains);
 - o Goals that are specific, measurable and time bound;
3. **Performance Level:** *Have the petitioners demonstrated that the target performance levels are both ambitious and attainable?*
 - o Performance levels that are both ambitious and realistic including rigorous promotion and graduation standards;
 - o Performance levels are considered annually and graduated as needed to sufficiently accelerate learning based on the needs of the target population;

1. Alignment: *Do the objectives align with the mission and vision?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Measurement: *Are the goals clear, specific and measurable?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

3. Performance Level: *Have the petitioners demonstrated that the target performance levels are both ambitious and attainable?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: PUPIL OUTCOMES

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
<p>HTOMS meets the statutory requirements of Education Code sections 47605(c)(5)(B) and (C) by clearly identifying measurable pupil outcomes and describing multiple methods for assessing pupil progress. Outcomes address schoolwide performance and student subgroups, including English Learners and students with disabilities, and align with the Eight State Priorities through the Local Control and Accountability Plan (LCAP)</p> <p>HTOMS pupil outcomes are clearly aligned with its mission, vision, and Montessori-based educational philosophy. The outcomes emphasize academic proficiency, self-motivation, critical thinking, social-emotional development, and lifelong learning, which are consistently reflected throughout the educational program design. The integration of Montessori principles—such as individualized learning, mixed-age classrooms, and student autonomy—supports coherence between stated outcomes and instructional practices.</p>	p. 82-89	<p>While pupil outcomes are broadly articulated and aligned to the mission, some outcomes emphasize qualitative descriptors (e.g., self-motivation, lifelong learning) without consistently identifying explicit, time-bound performance targets.</p> <p>Clearer articulation of expected growth benchmarks or proficiency thresholds tied to specific timelines would strengthen alignment with “ambitious and attainable” performance expectations.</p>	pg. 82-89

G. PUPIL PROGRESS

Summative evaluations measure student performance for the purpose of evaluating academic program effectiveness and overall school operation. In other words, they are used to determine how much students have learned. Formative evaluations measure student performance for the purpose of determining students’ learning needs and to inform instructional strategies. In other words, they are used to determine what students still need to learn.

A plan for evaluating Pupil Progress excels if it uses both formative and summative and includes the following characteristics:

1. Assessments: *Does the school have valid and reliable measures of student progress?*

- Identification of the expected range of formative and summative assessments including but not limited to state-mandated assessments;

- Evidence that assessments will be valid and reliable measures of student progress toward achieving the identified Pupil Outcomes.

2. Instruction Improvement: *Does the school have a sound plan for using assessments to inform instruction?*

- A coherent strategy for using student assessment and performance data to evaluate and inform instruction on an ongoing basis.

3. Reporting: *Is the school committed to reporting and disseminating performance information?*

- A plan for sharing performance information, including standardized test results, with students, families and public agencies, as required.
- A clear description of the manner in which stakeholders will act upon and make use of the performance information provided.

1. Assessments: *Does the school have valid and reliable measures of student progress?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Instruction Improvement: *Does the school have a sound plan for using assessments to inform instruction?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

3. Reporting: *Is the school committed to reporting and disseminating performance information?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

ANALYSIS: PUPIL PROGRESS

If Meets or Excels; <i>Strengths</i>	Refer ence	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Refer ence
HTOMS has clearly identified a comprehensive range of valid and reliable formative and summative assessments aligned to its pupil outcomes and instructional program. standards aligned while others are developed internally with rubrics to determine progress. Summative Assessments include all required state-mandated measures (CAASPP, CAST, ELPAC, CAA, PFT), ensuring alignment with California accountability expectations and enabling longitudinal comparisons across student groups.	pg. 82-88	While assessment analysis is frequent, the documentation of clear, time-bound instructional adjustments and expected impact is not consistently articulated across all grade spans. Evidence of how data-driven instructional changes are monitored for effectiveness over time is uneven. The Montessori emphasis on individualized learning is strong, but explicit connections between formative data and instructional pivots are sometimes implied rather than clearly documented.	

<p>Formative and Interim Assessments include Renaissance 360, SBAC Interim Assessment Blocks, pre- and post-diagnostic assessments, course-embedded assessments, portfolios, and performance-based exhibitions.</p> <p>Assessments are explicitly aligned to State Standards, Montessori learning progressions, and the school's defined academic and whole-child outcomes</p>			
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EDUCATIONAL PROGRAM SUMMARY

Please summarize your evaluation of the school's proposed educational program by rating the program's soundness as a whole. Your rating should reflect your overall impression of the plan as presented. Following the rating, please use the comment boxes to discuss the most significant strengths and weaknesses of the educational program.

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

EDUCATIONAL PROGRAM SUMMARY

Strengths

Based on a comprehensive review of the renewal petition and supporting documentation, the educational program proposed by Hayward Twin Oaks Montessori School (HTOMS) meets the standard for soundness and viability. The program is coherent, aligned to state requirements, and reflects a clear commitment to serving the academic and developmental needs of all students through a Montessori-informed, standards-based instructional model.

HTOMS demonstrates strength in its inclusive design, robust assessment system, and intentional use of professional development time to support instructional quality. The school exceeds required instructional minutes, maintains a structured academic calendar that prioritizes teacher collaboration, and implements a range of academic supports and interventions to address diverse learner needs. Collectively, these elements indicate a program that is educationally sound and reasonably likely to support positive pupil outcomes.

Concerns and Additional Questions

HTMOS educational program demonstrates overall soundness; however, several limitations were identified that constrain its ability to fully meet renewal criteria at the highest level. Specifically, while multiple assessment measures are administered, the documentation does not consistently demonstrate a systematic process for linking assessment results to instructional adjustments and for evaluating the effectiveness of those adjustments over time. In addition, although student performance data is made available to families, students, and stakeholders, the plan lacks sufficient specificity regarding how this information is intended to be used to drive instructional support, family engagement, and continuous improvement. Lastly, greater consistency and clarity in the description of implementation across grade spans would strengthen evidence of coherent, schoolwide execution of the educational program.

PETITIONER CAPACITY

Statutory References:

E.C. § 47605(b)(2); E.C. § 47605(b)(5)(D)-(P); E.C. § 47605(c)(2); and E.C. § 47605(g)

The Charter Schools Act requires the authorizer to determine whether the petitioners are “demonstrably unlikely to successfully implement the program.” Experience with new school development demonstrates that unless petitioners have sound plans and capacity for governance, management, employment and financial operation, they are unlikely to successfully implement the program. This section should provide a clear, convincing picture of the petitioners’ capacity to operate the school successfully.

A. GOVERNANCE CAPACITY

A description of the plan for Governance excels if it has the following characteristics:

1. Legal Structure: *Does the school have adequate and appropriate legal structure?*

- Documentation of proper legal structure (Articles of Incorporation stamped by the Office of the Secretary of State and corporate Bylaws);
- Evidence of 501(c)3 Non-Profit Corporation status;
- Adequate bylaws, policies & procedures for governing body operation (director selection & removal, decision making, powers and duties, expansion and transition plans)

2. Governance Experience: *Does the board demonstrate the capacity needed to govern effectively?*

- Evidence of analysis that proposed founding members of the governing body possess and will contribute the wide range of knowledge and skills needed to oversee a successful charter school;
- Evidence of the existing or emerging capacity of the proposed founding members of the governing board to work as an effective unit in the interest of the proposed charter school;

3. Operating Plan: *Does the school have an operating plan that complies with legal obligations and incorporates sound governance practices?*

- Demonstrated understanding of the board’s responsibility for the educational and fiscal integrity of the school and for fulfilling the terms of the charter;
- Clear, reasonable selection and removal procedures, term limits, meeting schedules, and powers and duties for members of the governing body;
- Demonstrated understanding and assurance of compliance with open meetings requirements;
- Reasonable conflict of interest policy;
- Adequate plan for insurance;
- A plan for meaningful involvement or input of parents and community members in the governance of the school;
- Clear, sensible delineation of roles and responsibilities of parent councils, advisory committees or other supporting groups; and
- Clear, sensible definition of governing body roles and responsibilities in relation to management.

1. Legal Structure: *Does the school have adequate and appropriate legal structure?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Governance Experience: *Does the board demonstrate the capacity needed to govern effectively?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

3. Operating Plan: Does the school have an operating plan that complies with legal obligations and incorporates sound governance practices?

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: GOVERNANCE CAPACITY

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
<p>The Charter School demonstrates a governance structure that is largely sound and compliant with applicable statutory requirements. The school operates under an appropriate legal structure as a California nonprofit public benefit corporation with valid 501(c)(3) status and clearly articulated autonomy consistent with the Charter Schools Act. The Board has adopted required policies, including a reasonable Conflict of Interest Code, maintains appropriate insurance coverage, and conducts meetings in compliance with the Brown Act.</p> <p>HTOMS also maintains an operating plan that reflects generally sound governance practices. Roles and responsibilities of the governing board, Superintendent, and supporting committees are clearly delineated in policy and practice, with appropriate safeguards for delegation of authority and retention of ultimate board accountability. Structures are in place to ensure meaningful parent and community involvement through advisory committees, parent organizations, and stakeholder engagement processes.</p>	pg. 90-97	<p>While the governance framework is well defined, evidence demonstrating the Board’s depth of experience and capacity to govern at a consistently high level is limited. Although the Board participates in required training and demonstrates compliance with core governance responsibilities, the petition does not establish sustained expertise in charter school oversight, long-term strategic governance, or continuous performance monitoring.</p>	pg. 90-92

B. MANAGEMENT CAPACITY

A leadership plan excels if it has the following characteristics:

1. **Enrollment Procedures:** *Does the petition present reasonable enrollment procedures that comply with applicable law?*
 - A description of the means by which the school will seek to attain a racial and ethnic balance among its pupils that is reflective of the district including specific plans and strategies for student recruitment;
 - A clear and compelling student recruitment plan likely to attract projected enrollment, particularly in Year 1;
 - A specific plan for conducting a public random drawing or an assurance that such a drawing will be conducted subject to district approval in the event that the number of pupils who wish to attend the school exceed the capacity;
 - An assurance that the school will not impose admission requirements OR, if the school proposes to have requirements, a precise description of those requirements, a compelling statement regarding why they are essential to fulfillment of the school's mission, and a specific plan for the school will incorporate the requirements into any random drawings.
 - A clear description of the enrollment process to include any unique intake or application evaluation process to be used by the school designed to meet the needs of the target population outlined in the petition.

2. **Operating Procedures:** *Does the petition present sound operating procedures that comply with applicable law?*
 - The procedures that the school will follow to ensure the health and safety of pupils and staff;
 - A clearly articulated discipline policy with suspension and expulsion procedures that are fully explained consistent with the school's mission, educational philosophy and applicable law;
 - A statement regarding attendance alternatives for students residing in the district who choose not to attend the school;
 - A statement that the school intends to use the district's approved procedure for resolving disputes relating to provisions of the charter OR, in the alternative, a clear description of the procedures that the school proposes to use;
 - A description of the systems likely to be effective in addressing parent and community complaints; and
 - An assurance that the school will comply with the district's approved procedures for school closure in the event that the charter is relinquished, revoked or not renewed.

3. **Management Structure:** *How effective is the management structure likely to be?*
 - Clearly defined management roles and responsibilities for all positions within the administration of the school;
 - A clear plan for recruitment, selection, development and evaluation of staff including the school leader;
 - Verifiable internal procedures and controls to ensure conformance with the approved budget;
 - An approved and public organizational chart delineating board and management roles and lines of authority;
 - Clear, sensible delineation of roles and responsibilities for implementing the school program including clearly defined roles for parent councils, advisory committees and other supporting groups;
 - Management job descriptions identifying key roles, responsibilities and accountability;
 - An allocation of time, financial resources and personnel that is sufficient for planning and start-up prior to the school's opening; and

- The manner in which administrative services are to be provided and any potential civil liability effects on the school or the district.

1. Enrollment Procedures: *Does the petition present reasonable enrollment procedures that comply with applicable law?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

2. Operating Procedures: *Does the petition present sound operating procedures that comply with applicable law?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

3. Management Structure: *How effective is the management structure likely to be?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: MANAGEMENT CAPACITY

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
The petition states a clearly defined administrative structure, with detailed descriptions of responsibilities for the Superintendent, Principals, Directors, Instructional Coaches, and other support staff.	p. 97-108	While the structure is well designed, documentation of the consistent effectiveness of management oversight, particularly in monitoring program fidelity and linking administrative decisions to student outcomes, is not fully discussed. Operating procedures are described at a general level, but additional detail is needed to understand how policies—particularly related to discipline, complaints, and parent communication—are implemented consistently and monitored for effectiveness. The petition also does not clearly define how management uses data to guide instructional improvement, intervention oversight, and subgroup performance monitoring.	

C. EMPLOYMENT CAPACITY

An employment plan excels if it has the following characteristics:

1. **Qualifications and Responsibilities:** *How clear and sensible are required staff capacities and intended allocation of responsibilities?*
 - Description of the qualifications for and responsibilities of key employees of the school, including the instructional leader and other key school administration positions.

2. **Compensation Plan:** *How sound is the staff compensation plan?*
 - A compensation plan based on sound budget assumptions that reflects understanding of the prevailing market and supports the proposed educational program.

3. **Policies and Assurances:** *Does the petition contain the required assurances and a reasonable plan for policy development?*
 - Adequate personnel policies or a sound plan articulated for timely development;
 - An assurance that staff will meet applicable state and federal requirements for credentialing and "highly qualified" status;
 - An adequate description of the manner by which staff members of the charter school will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security;
 - A statement regarding employee rights of return, if any;
 - A clear declaration of whether or not the charter school shall be deemed the exclusive public school employer of the employees of the charter school for the purposes of the Educational Employment Relations Act; and
 - An assurance that staff will have criminal background and other required health and safety checks and manner in which these will be conducted.

1. Qualifications and Responsibilities: *How clear and sensible are required staff capacities and intended allocation of responsibilities?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Compensation Plan: *How sound is the staff compensation plan?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

3. Policies and Assurances: *Does the petition contain the required assurances and a reasonable plan for policy development?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: EMPLOYMENT CAPACITY

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
Job descriptions reflect appropriate qualifications,			

<p>Montessori experience, and expertise necessary to implement the educational program. Systems for staff recruitment, selection, development, and evaluation are articulated, as are internal controls to ensure fiscal and operational</p>			
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D. FINANCIAL CAPACITY

The petition should present an understanding of how the charter operators intend to manage the school’s finances and maintain the organization’s financial viability. It should make a persuasive case for financial viability including sound revenue projections; expenditure requirements; and budgetary support for and alignment with the educational program.

A plan for financial capacity excels if it has the following characteristics:

1. Financial Operation: *How would you rate the structures and practices related to financial operation?*

- A balanced three-year budget accurately reflecting all budget assumptions;
- A start-up year plan with reasonable assessment of and plan for costs;
- A clear indication that the school has a sound plan for sustainability including funding for the core program that does not have ongoing reliance on “soft” money (e.g., donations, grants, etc.);
- Clear evidence and track record of sustainability, in the event there is an enduring reliance on “soft” money (e.g., donations, grants, etc.);
- An adequate reserve and contingency plan targeted to the minimum enrollment needed for solvency (especially for year 1);
- A sound plan for financial management systems;
- An audit assurance and/or plan with adequate budget allocation; and
- A plan for dissolution of assets should the school close.

2. Revenues: *How would you rate the accuracy and attainability of the revenue projections?*

- A narrative explaining key revenue assumptions;
- Realistic revenue projections showing all anticipated revenue sources -- including state, local, federal and private funds, and any fee-based programs and services;
- Realistic cash flow projection; and
- A fundraising plan including assumptions and report on current status.

3. Expenditures: *How would you rate the expenditure plan in terms of sound assumptions and priorities consistent with effective operation of the school?*

- Spending priorities that align with the school’s mission, educational program, management structure, professional development needs, and growth plan;
- A budget narrative explaining key expense assumptions;
- Realistic expense projections addressing major operating expenses including staffing and benefits, special education, facility, materials and equipment, and contracted services;

- Budgeting to meet minimum insurance requirements; and
- Evidence to support key assumptions including that compensation is sufficient to attract qualified staff and that facilities budget is adequate.

1. Financial Operation: *How would you rate the structures and practices related to financial operation?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

2. Revenues: *How would you rate the accuracy and attainability of the revenue projections?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

3. Expenditures: *How would you rate the expenditure plan in terms of sound assumptions and priorities consistent with effective operation of the school?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>

ANALYSIS: FINANCIAL CAPACITY

If Meets or Excels; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
		<p>While the petition has met the budgetary standard set by CDE for a two year period; the petition does not mention who will oversee the independent audit of these resources.</p> <p>While the petition includes operational budget and reasonable estimates of all expected revenues and expenditures, the petition states that the auditor will have at minimum a CPA, educational institution audit experience, not experience in education finance.</p> <p>The petition does not mention that the audit report will be submitted to the SBE (State Board of Education)</p>	pg. 122

E. FACILITIES PLAN

The Facilities Plan should demonstrate that the petitioners understand the school’s facilities needs and its options for meeting those needs.

Do the petitioners anticipate using a district facility or finding a facility independent of the district?

- Non-district facility **X** District facility (Prop 39)

District facility anticipated pursuant to Prop 39

A description of the facilities plan where the applicants have not yet identified a specific site will include the following characteristics:

- Informed assessment and description of anticipated facilities needs;
- Adequate budget based on 3% of anticipated per pupil revenue;
- A thoughtful contingency plan in the event that a mutually agreeable district facility is unable to be procured,
- A site preference with a compelling rationale for the preference; and
- An assurance of legal compliance (health and safety, ADA, and applicable building codes).

Facilities Plan: Does the facilities plan indicate a thorough understanding of the school's needs?

Inadequate	Approaches	Meets	Excels
X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ANALYSIS: FACILITIES PLAN

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
		The petition does not address facilities.	

PETITIONER CAPACITY SUMMARY

Based on the information presented in the petition, how would you rate the likelihood that petitioners will successfully implement the proposed program? Your comments should identify the most significant strengths and weaknesses with respect to petitioner capacity.

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

PETITIONER CAPACITY SUMMARY

Strengths
<p>Based on the information presented in the petition, the Charter School demonstrates adequate capacity to successfully implement the proposed educational program. The petition provides detailed evidence of organizational, governance, management, and employment structures that collectively support the implementation of the Montessori-based curriculum and the broader educational mission. The petitioners demonstrate sufficient capacity to implement the proposed educational program successfully, with established governance, leadership, and operational systems that support the Montessori instructional model. While certain areas—particularly the systematic use of assessment data, monitoring of instructional impact, and schoolwide consistency—require additional clarity and strengthening, these limitations do not preclude successful implementation. Addressing these areas would further enhance the Charter School’s readiness and overall effectiveness.</p> <p>The Board of Directors is well-defined with clear roles and responsibilities, adherence to conflict-of-interest policies, and ongoing training on governance, ethics, and legal compliance. Committees such as ELAC, Wellness, and School Safety provide structured opportunities for parent, student, and staff engagement in decision-making, demonstrating a strong commitment to participatory governance.</p> <p>The petition presents a coherent management framework with clearly defined roles for key administrators, including the Superintendent, Principals, Directors, and Instructional Coaches. Administrative staff possess appropriate Montessori and credentialing qualifications, experience in curriculum implementation, and leadership capacity to oversee both academic and operational functions.</p>

The Charter School articulates clear staff qualifications, responsibilities, and job descriptions aligned with Montessori pedagogy and state standards. Employment policies include assurances regarding credentialing, background checks, retirement benefits, and compliance with federal and state employment laws. Staff recruitment and retention strategies are reasonably described, supporting program continuity.

Enrollment, discipline, attendance, and health and safety policies are outlined and designed to comply with applicable law. The Charter School provides for equitable enrollment, procedural transparency, and operational accountability, reflecting capacity to manage day-to-day school operations effectively.

Criteria Not Sufficiently Addressed, Concerns & Additional Questions

While multiple formative and summative assessments are utilized, the petition does not consistently demonstrate a systematic process for using assessment results to inform instruction or to evaluate the impact of instructional adjustments over time.

The plan for disseminating student performance data to families and stakeholders is adequate; however, greater specificity is needed on how this information will actively guide instructional support, family engagement, and programmatic improvement.

Evidence of uniform implementation across grade spans is limited. Strengthening clarity and documentation of consistent schoolwide practices would reinforce capacity to execute the program coherently across all levels.

Although staff roles, responsibilities, and compensation are well-described, the petition provides limited evidence of systematic monitoring of staff capacity relative to programmatic goals and evaluation of compensation structures to ensure retention and program effectiveness.

The petition also does not adequately demonstrate how enrollment and recruitment practices are designed to reflect Hayward USD's highest-need student populations, including English learners and students with disabilities. The absence of targeted outreach strategies and analysis of enrollment disparities limits confidence that access and equity concerns are being systematically addressed.