

[District/COE]

Charter School Pre-Opening Requirements Checklist

Provision of all documents listed herein, to the satisfaction of the authorizer, is a condition of opening the charter school. In the event that the Board determines that the school has failed to comply with these conditions, the Board may delay the opening of the Charter School by up to one year and may specify conditions for such delayed opening.

Category	MOU Reference	Description	Due Date	✓
School Basics		School contact information: school leader name, school phone, school fax, school leader emergency phone, leader email, school address		
		Confirmation of receipt of CDS code		
		Roster of school leadership (Excel format) with phone and email, including: <ul style="list-style-type: none"> • school leader • assistant leader (vice principal, assistant principal, etc.) • on-site coordinators and/or coaches • designated special education coordinator • designated English learner coordinator • designated Section 504 coordinator • designated McKinney-Vento (homeless) coordinator • office/operations manager • primary finance/accounting contact • primary human resources contact 		

Category	MOU Reference	Description	Due Date	✓
		Organizational chart, extending at least from governing board to classroom teachers		
Governance		Final copy of charter that incorporates any required changes post-approval		
		Articles of Incorporation (with proof of filing)		
		Bylaws approved by governing board (with minutes of meeting at which approved)		
		Proof of federal non-profit status (501(c)(3) letter with Employee Identification Number)		
		Roster of current board members, including terms (date service began, when re-elected, end date of current term) and officers positions and/or committees		
		Description of process for recruitment, nomination, screening and election of board members (may include excerpts from charter, governance policies and/or bylaws)		
		Calendar of governing board meetings		
		Certification of Brown Act Training (designated form)		
		Adopted Board Policies and Procedures (all policies to clearly state date of adoption on the document): <ul style="list-style-type: none"> • Conflict of Interest Policy • Fiscal Control/Management Policy • Student Records (FERPA) Policy • Admission/Enrollment/Attendance Policy • Student Health and Medications Policy, including procedures and forms for administration of first aid and medications 		

Category	MOU Reference	Description	Due Date	✓
		<ul style="list-style-type: none"> • Student Discipline Policy, including suspension/expulsion standards and procedures • Student Grading and Grade Promotion/Retention Policy • Student Free Speech and Expression Policy 		
		Closure procedures		
School Site Procedures		Contract or license for student information / attendance tracking system		
		Food service plan or contract with food service vendor		
		Health department approval for service of food at school facility		
Risk Management		Certificates of Insurance, with authorizer as an additional insured		
		Risk Management Plan or Policy		
		Safety/Emergency Response Plan		
Human Resources		Employee Handbook, with information on mandated child abuse reporting responsibilities, non-discrimination, sexual harassment, and complaint procedures		
		DOJ number received for criminal background checks		
		Standard form employment contracts or engagement letters, as applicable		
		List of all staff hired (Excel format), including information on teacher credentials and assignments		

Category	MOU Reference	Description	Due Date	✓
		Certification that all employees have been subject to criminal background check (FBI and DOJ) and screening for tuberculosis		
		Certification that all employees have been trained in health, safety and emergency procedures		
		Board-approved policy on screening for volunteers and vendors		
		Contract for STRS and/or PERS reporting, as applicable		
		Contract for payroll services provider or statement of who will be responsible for processing payroll		
		Job descriptions for all leadership positions (listed above) and teachers		
		Performance evaluation procedures for leadership positions (listed above) and teachers		
Facilities		Signed Lease or Facilities Use Agreement		
		Certificate of Occupancy		
		Fire Marshall Report		
		Pass pre-opening site inspection (including completion of corrective action), to satisfaction of charter authorizer staff		
Admission / Enrollment		Promotional materials and description of outreach/recruitment activities undertaken (with dates and locations)		
		Admission application form/s		

Category	MOU Reference	Description	Due Date	✓
		Lottery announcement (date, time, location)		
		Enrollment/registration package		
		List (Excel format) of students admitted and on wait list, including student name, CSIS number, DOB, grade enrolled, parent/guardian name/s, home address, phone, district of residence, prior school attended, enrollment status (admitted, enrollment complete, wait list)		
		Verification that school has completed enrollment process for a number of students in each grade equal to at least 80% of the enrollment projected in its budget for the first year of operation		
		Policy or procedure, plus forms, for exiting students for reasons other than expulsion (i.e., voluntary withdrawal), including procedure for notification to superintendent of student's district of residence		
Education Program		Scope and sequence for all grades/subjects to be taught in the first year of operation		
		List of instructional materials and textbooks to be used in the first year of operation; copy of order for materials		
		Annual calendar		
		Daily bell schedule for site-based programs		
		LCAP		
		Student (or Family/Parent) Handbook, including suspension/expulsion procedures		
		Statutory notifications to parents, including rights of parents/guardians under NCLB		

Category	MOU Reference	Description	Due Date	✓
Special Needs		Rehabilitation Act Section 504 Policy and Procedures		
		Special Education Policy and Procedures		
		Signed documentation confirming membership in a SELPA		
		Contract/s with special education or 504 service providers		
		Certification Requirements		
English Learners		English Learner policy, including copies of required notifications to parents and plan for parent engagement		
		Description of English learner program elements, including assigned teachers		
Finance		CDE charter school “annual information survey” electing direct funding		
		PENSEC		
		Revised Preliminary Budget		
		Contract with “back office” management services provider, bookkeeper, accountant or other firm or individual responsible for financial management		
		Public Charter School Grant Program application and subsequent correspondence re: status		
		Bank information for transfer of funds from authorizer		