

SAMPLE Pre-Opening Checklist

SCHOOL BASICS				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
School contact information	School contact information: school leader name, school phone, school fax, school leader emergency phone, leader email, school address	July 1 st		
CDE code	Confirmation of receipt of CDS code	July 1 st		
School leadership	Roster of school leadership with phone and email, including:	August 1 st		
	• school leader			
	• assistant leader (V.P., assist princ, etc.)			
	• on-site coordinators and/or coaches			
	• designated special ed coordinator			
	• designated English learner coordinator			
	• designated Section 504 coordinator			
	• designated homeless coordinator			
	• office/operations manager			
• primary finance/accounting contact				
• primary human resources contact				
Organizational chart	Structure of organization from governing board to classroom teacher, including Charter Management Organization, if applicable.	August 1 st		

GOVERNANCE				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Final charter	Final copy of charter with any requested changes	One week prior to approval of MOU		
Articles of Incorporation	As submitted to the state	July 1 st		
Bylaws	Latest version approved by the governing board	July 1 st		
501(c)(3) tax-exempt status	Letter from IRS confirming approval of tax exempt status	July 1 st		
Board roster	Names and email addresses of all board members, with end date for current term of service, officers and committee assignments identified.	September 1 st		

GOVERNANCE Cont.

Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Board clearance	Certification of clearance of governing board members (criminal background check DOJ and FBI; child abuse registry check)	September 1 st		
Board training	Verification of annual Brown Act and Fair Political Practices Act training for board and leadership	September 1 st		
Board meeting schedule	Dates, times and locations for all regular meetings of the board for the fiscal year; include all standing committees; identify annual organizational meeting at which board members and officers are elected	September 1 st		
Meeting agendas	All board and standing committee meeting agenda for the period from approval of the charter by SDCOE to the due date	September 1 st		
Meeting minutes	Minutes of all board and standing committee meetings for the period from approval of the charter by SDCOE to the due date	September 1 st		
ADOPTED POLICIES	All policies to be clearly marked with date of most recent board adoption.			
Conflict of Interest Policy	Conflict policy compliant with Charter and Fair Political Practices Act	August 1 st		
Public Records Act Policy	Procedures implementation of California Public Records Act	August 1 st		
Special Education Policy	Including procedures compliant with IDEA and requirements of SELPA; consistent with Charter	July 1 st		
Student Records Policy	FERPA-compliant student records policy, including information on directories and parental access to records	July 1 st		
Admission/Enrollment Policy	Procedures for admission and enrollment of students in the school, including assurances of non-discrimination	July 1 st		
Student Discipline Policy	Policies and procedures for student discipline, including behavior expectations, suspension/expulsion standards, and due process; including procedures for students with disabilities	July 1 st		
Rehabilitation Act §504 Policy	Procedures to ensure compliance with legal requirements; consistent with Charter	July 1 st		
English Learner Policy	Procedures to ensure compliance with legal requirements, including identification, placement and reclassification; consistent with Charter	July 1 st		
Complaint and/or Internal Dispute Resolution Policy	Including procedures and forms; must include Uniform Complaint Procedure; may include other forms and systems established by school	July 1 st		

GOVERNANCE Cont.				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Fiscal Management/Control Policy	Internal fiscal control policies and procedures meeting GAAP, including procedures for receipt and disbursement of funds, reconciliation of accounts, contracting, budget preparation, and protection of assets	July 1 st		
Health and Safety Policy/ies	Covering student health and wellness practices (including immunizations, medications, screenings, student wellness, and food service) and safety procedures for each campus, including campus supervision, field trip supervision and screening of volunteers	August 1 st		
Student Grading/Promotion	Policies and procedures regarding student grading, placement of students by grade, promotion from one grade to the next, and retention in current grade; including samples of parent notifications	August 1 st		
Student Free Speech Policy	Standards and procedures regarding student free expression, consistent with applicable state and federal law	August 1 st		

ADMINISTRATION				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Proof of Insurance	Certificate of insurance in the amounts required by the MOU; SDCOE as additional insured	August 1 st		
Risk Management Plan	Policies and practices to prevent and address reasonably foreseeable risks and incidents occurrences, plus certification that such policies and practices have been instituted	August 1 st		
Student information system	Contract or other verification of student information/attendance tracking system	July 1 st		
Student nutrition	Contract or other verification of plan for providing free or reduced price nutritionally adequate meals	August 1 st		
Health Department	Health department approval for service of food at school facility	August 1 st		

PERSONNEL				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Employee Handbook	Personnel policy/ies and/or documentation provided to all employees regarding terms of employment; including mandated child abuse reporting, non-discrimination, sexual harassment, and complaint procedures	July 1 st		
Teacher credentials and highly qualified teacher requirements	Spreadsheet containing specified information on all instructional personnel	August 1 st		
Criminal and TB screening	Certification that all employees have been subject to criminal background check (FBI and DOJ) and tuberculosis screening	August 1 st		
Safety training	Certification that all employees have been trained in health, safety and emergency procedures	First day of school		
Payroll	Contract or other verification of payroll service provider; or identification of individual responsible for payroll processing	July 1 st		
STRS/PERS Reporting	Contract/s for STRS and/or PERS reporting	July 1 st		
Job descriptions	Job descriptions for all school leadership positions (listed above) and teachers (including resource teachers, prep teachers, instructional coaches, etc.)	July 1 st		
Evaluation	Performance evaluation procedures for all leadership positions (listed above) and teachers (including resource teachers, prep teachers, instructional coaches, etc.)	July 1 st		

STUDENT ENROLLMENT				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Recruitment materials	Promotional materials and description of outreach/recruitment activities to be undertaken (with dates and locations); including notice of enrollment period (accepting applications, close of applications, lottery, etc.)	January 1 st		
Admission, Enrollment and Exit Procedures	Description of process for admission and enrollment of students, consistent with Charter, and including dates for receiving applications and conducting lottery; also addressing process for exit (voluntary withdrawal) and notification of district of residence	January 1 st		

STUDENT ENROLLMENT Cont.				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Application Form	Current printed, downloadable or on-line form to apply for admission to the school	January 1 st		
Required documents/enrollment package	List of information and documents required to complete enrollment of admitted students	January 1 st		
Verification of sufficient enrollment	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; verification to consist of spreadsheet with student name, DOB, grade enrolled, parent/guardian name/s, home address, phone	July 1 st		
Student roster	List (specified Excel format) of students admitted, enrolled 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 (i.e., admitted, enrollment complete, wait list)	September 30 th of first year		
Notices to Parents/Guardians	Copies of all mandated notices to parents and guardians, including those required under NCLB and other applicable law (examples: ESSA Title I, English learners, special education, etc.)	August 1 st		
Student/Family Handbook	Material provided to students and families regarding school policies, procedures and expectations; including attendance, discipline, parent volunteers, electronics, dress codes, etc.	August 1 st		

FACILITY				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Facilities Lease Agreement(s)	Lease, rental agreement, facilities use agreement or similar documentation of right to use school facilities	July 1 st		
Building permits	Evidence of compliance with local building code for educational uses, including building permits and zoning (conditional use permit)	1 week prior to opening		
Certificate of Occupancy	Valid current Certification of Occupancy for school use	1 week prior to opening		

FACILITY Cont.				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Fire Marshal Inspection	Verification of passage of Fire Marshal inspection of the site	1 week prior to opening		
Safety plan	Safety and emergency response plan for specific site/s, covering earthquake, fire, natural disasters, bomb threat and criminal activity lock-down procedures; sample evacuation plans for classrooms; planned rotation of safety drills	2 weeks prior to opening		
Facility inspection	School site passes, to satisfaction of [authorizing agency] staff, pre-opening facility inspection based on published standards	1 week prior to opening		

ACADEMIC PROGRAM				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Academic calendar	Calendar of academic year showing holidays, recess periods, staff development days, etc.	July 1st		
Daily bell schedule for site- based programs	Current schedule of class periods on daily and weekly basis, with arrival and dismissal times for regular and early release days	July 1st		
LCAP	Local Control and Accountability Plan, using state template	July 1st		
Curriculum	Scope and sequence for all subjects in grades to be served in first year	1 week prior to opening		
A-G Approved Courses: High Schools Only	Verification of UC/CSU approval of A-G courses	August 1st		
Instructional materials	List of instructional materials and textbooks to be used in the first year of operation; copy of orders for materials	August 1st		
SELPA Documentation	Verification of provision for special education services: membership in a Special Education Local Planning Area (SELPA) or agreement with SDCOE on charter school as "school within the district" for purposes of special education	July 1st		

ACADEMIC PROGRAM Cont.				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Special education services (if not "school within the district")	Signed contract with special education and/or 504 service providers; or identification of individual/s responsible for providing service	August 1 st		
Independent Study Program Verification (if applicable)	Documentation verifying compliance with independent study requirements	August 1 st		

FINANCE				
Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Attendance Accounting Procedures	Description of or instructions for attendance accounting	August 1 st		
Preliminary Budget	Budget for first fiscal year of operation; completed using specified template and instructions for additional information, as requested (i.e., MYP, Cash Flow, LCAP expenditures, special education)	1 week before July 1 st deadline		
Revised Preliminary Budget	Updated/revised budget and cash flow schedule for first fiscal year of operation; completed using specified template, with amounts reflecting actual enrollment and hiring	September 1 st		
Charter School Annual Information Survey	CDE on-line form designating status of school as direct or in- direct funded	CDE due date prior to opening (May)		
PENSEC	Pupil Estimates for New or Significantly Expanding Charters (PENSEC) reporting estimated average daily attendance (ADA) and other pupil counts for charter schools that will be newly operational	1 week before CDE due date in fiscal year prior to opening (July)		
Procedures to be used in event of school closure	Plan for school closure, consistent with charter provisions	July 1 st		
Identification of point of contact for closure activities	Name, phone, email, fax and postal address for primary contact in event of school closure	July 1 st		

FINANCE Cont.

Item	Description	Due Date (all dates prior to school opening)	Date of Completion	Verified By: Ex. J. Smith X 1234
Accounting services	Signed contract with back-office or financial services provider; or identification of individual/s responsible for fiscal management	July 1 st		
Bank information for fund transfers	Completed forms for transfer of funds to charter school (to COE for direct-funded; to [authorizing agency] for locally-funded)	June 1 st		
Start-up grant	Public Charter School Grant Program application and subsequent correspondence re: status	July 1 st		

SAMPLE