



san diego county office of  
**EDUCATION**

FUTURE WITHOUT BOUNDARIES™

# CHARTER SCHOOL WELCOME PACKET



2024-25

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## Finance

A charter school has been authorized. Now what? Upon receiving approval to operate within San Diego County, there are a few things that a new charter school will need to do in order to receive funding and establish retirement reporting.

### *1. Establish a Fund 62*

If the charter school is direct funded, the charter school will need a Fund 62 to receive state and federal revenues and track its finances. A [sample fund 62 resolution](#) can be found on the San Diego County Office of Education (SDCOE) [Financial Accounting webpage](#).

### *2. Establish a Business Unit ID at SDCOE*

Complete the [Charter Oracle Account Questionnaire](#) and return it to Charter School Services at [charters@sdcoe.net](mailto:charters@sdcoe.net).

### *3. Establish an Oracle Account at the San Diego County Treasury*

If the charter school is direct funded, the California Department of Education (CDE) will send your apportionments to the San Diego County Treasury. Upon receipt at the Treasury, SDCOE will move your apportionment into the charter school's specific account. In the event that the charter school has not established an Oracle account with the Treasury prior to CDE issuing the first apportionment, the apportionment will be forwarded to the authorizing agency of the charter school. The authorizing agency will need to forward funds to the appropriate charter school. SDCOE will establish your Oracle account at the San Diego County Treasury. In order to establish an Oracle account, SDCOE will need the original board resolution to establish a Fund 62, and the completed [Charter Oracle Account Questionnaire](#).

Upon receipt of these two documents, SDCOE will proceed with establishing the Oracle account. This process usually takes about two to three weeks. Please plan accordingly. Original documents can be sent to:

San Diego County Office of Education  
**Attention: Charter School Services**  
6401 Linda Vista Road  
San Diego, CA 92111

#### 4. *Wire Transfers from an Oracle Account at the San Diego County Treasury*

If the charter school plans to do wire transfers you will need to establish Wire Access Request Portal (WARP) access. The charter school will need to work directly with the San Diego County Treasury in order to gain access. Access will not be granted until you have established an Oracle account. Instructions on how to establish WARP access are available in Section 1.11 of the [Financial Accounting Reporting Manual](#).

## Retirement Reporting

The San Diego County Office of Education (SDCOE) is required to report earnings and retirement contributions to the California State Teachers' Retirement System (CalSTRS) and the California Public Employees' Retirement System (CalPERS), for all local educational agencies (LEAs) in San Diego County. A charter school that is authorized to operate within San Diego County, and participating in CalSTRS and/or CalPERS, must report all CalSTRS and CalPERS through SDCOE. We have provided some helpful information and resources below to assist in CalSTRS and CalPERS participation and retirement reporting. If your charter school is not participating in CalSTRS or CalPERS, you do not need to complete any information below.

### 1. *Retirement Reporting for Charters*

The [SDCOE Retirement Reporting webpage for Charter School Independent Reporting](#) information contains:

- SDCOE Agreement for Charter School Retirement Reporting Services
- SDCOE Fee Schedule
- SDCOE Reporting Due Dates
- CalSTRS and CalPERS required documents and information for the application process for plan participation
- File Layouts

SDCOE **requires** a charter school to complete the [SDCOE Agreement for Charter School Retirement Reporting Services 2024-2025 \(PDF\)](#).

Once a charter school has been approved by CalSTRS and/or CalPERS, it will be reporting its payroll and retirement contributions to SDCOE. Charter school officials should review the [SDCOE Retirement Reporting webpage for Charter School Independent Reporting](#) for useful information and documents.

The SDCOE contact for charter schools' retirement reporting is:

Beth Valderrama  
Manager, Retirement Systems  
San Diego County Office of Education  
6401 Linda Vista Road, Room 605  
San Diego, CA 92111  
Phone: 858-295-6913  
Fax: 858-279-2953  
Email: [elizabeth.valderrama@sdcoe.net](mailto:elizabeth.valderrama@sdcoe.net)

## 2. *Participation in CalSTRS*

CalSTRS **requires** charter schools to complete the [CalSTRS Application for CalSTRS Activation ES1796 - REV May, 2020 \(PDF\)](#) (Includes Pre-Tax Deductions for Voluntary Receivable Resolution. See Section 4 on Page 6) prior to submitting contributions to CalSTRS. Send completed documents to the above contact at SDCOE for charter schools' retirement reporting.

*Please note that the CalSTRS application approval process can take six to eight weeks.*

## 3. *Participation in CalPERS*

CalPERS **requires** charter schools to complete the following forms and submit them to SDCOE:

- [CalPERS Circular Letter — New Charter School Certification Form for Charter Schools Requesting to Participate in the CalPERS Plan \(PDF\)](#)
- [CalPERS School Applicant Questionnaire \(PDF\)](#)
  - Copy of the Charter School's Approval for Establishment
  - Charter Petition
  - Articles of Incorporation
  - Bylaws
  - Audited Financial Report
- [CalPERS Resolution to Tax Defer Member Paid Contributions — IRC 414\(h\)\(2\) Employer Pick-Up \(.doc\)](#)
- [CalPERS Employer Resolution Tax Deferred Deduction Plan for Service Credit Purchases \(.doc\)](#)

CalPERS approval must be in place prior to withholding and reporting CalPERS retirement contributions from any of your employees. You should not report your employees under any other agency currently participating in the CalPERS plans until the charter school has been approved to participate in CalPERS. ***Please note that the CalPERS application approval process can take up to six months.***

## Learning and Leadership Services

In collaboration with other divisions within the San Diego County Office of Education, the Learning and Leadership Services (LLS) division works diligently to assist charter schools and districts in our county and region in providing the best possible education for all of our students. LLS focuses on building the capacity of charter school and district staff in the areas of assessment, accountability, and evaluation; college and career readiness; district and school improvement; and leadership.

The LLS team impacts student achievement through the improvement of:

- Teacher Practice
- Instructional Leadership
- District Systems of Support

Dr. Angela Bass, Assistant Superintendent of Learning and Leadership Services

Phone: 858-298-2149

Email: [abass@sdcoe.net](mailto:abass@sdcoe.net)

### *1. Assessment, Accountability, and Evaluation*

The [Assessments](#), Accountability, and [Evaluation](#) teams provide information, consultation, professional development, and technical assistance in all areas of assessment, program evaluation, and data analysis for charter schools and districts in San Diego County. This department also conducts monitoring service for [federal programs, Title I, Title III](#), Local Control and Accountability Plans (LCAPs), and Williams Settlement monitoring.

Steven Green, Senior Director of Assessment, Accountability, and Evaluation

Data & Impact Center of Excellence

Phone: 858-295-8834

Email: [steven.green@sdcoe.net](mailto:steven.green@sdcoe.net)

## 2. *Local Control and Accountability Plan (LCAP)*

The Assessment, Accountability, and Evaluation team also provides local educational agencies (LEAs) with [resources and support for developing and monitoring the implementation of their LCAP](#). By communicating timely and accurate information regarding LCAP regulations and best practices, LEAs are better equipped to design goals, actions, and services to meet the needs of their students and stakeholders, especially students who are learning English as a second language, in foster care, experiencing homelessness, or from low-income families.

Deborah Hernandez, Ed.D., Director of Continuous Improvement and LCAP

Phone: 858-295-8827

Email: [deborah.hernandez@sdcoe.net](mailto:deborah.hernandez@sdcoe.net)

## 3. *District and School Improvement*

The District and School Improvement department provide innovative, high-quality leadership and improvement services that develop systems thinking charter schools and districts to ensure equity and access for each and every student so they are prepared for college and career. Support is provided to charter schools and districts in building coherent systems focused on [improving instructional leadership](#), professional practice, and [systems of support](#).

Jeff Warshaw, Senior Director of District and School Improvement

Phone: 858-295-8919

Email: [jeff.warshaw@sdcoe.net](mailto:jeff.warshaw@sdcoe.net)

## 4. *Curriculum and Instruction*

The [Curriculum and Instruction team](#) offers innovative services that keep the focus on students to assist teachers, instructional coaches, and administrators in implementing California Standards, instructional frameworks, and research-based instructional practices across all content areas.

Dr. Shannon Baker, Executive Director of Curriculum and Instruction

Phone: 858-295-8895

Email: [shannon.baker@sdcoe.net](mailto:shannon.baker@sdcoe.net)

## 5. *Leader Networks and Professional Development Opportunities*

### **English Learners and Language**

- [English Learners Resources](#)
- [Dual Language School Site and District Support](#)
  - Contacts:
    - Olympia Kyriakidis, Ed. D.  
Executive Director, Multilingual Education and Global Achievement (MEGA)  
Phone: 858-295-8991  
Email: [olympia.kyriakidis@sdcoe.net](mailto:olympia.kyriakidis@sdcoe.net)
    - Izela Jacobo  
Senior Director, MEGA  
Phone: 858-295-8985  
Email: [izela.jacobo@sdcoe.net](mailto:izela.jacobo@sdcoe.net)
- [Long-Term English Learner Network](#)
- [Multilingual Education and Global Achievement](#)
- [World Languages](#)

### **Content Areas**

- [English Language Arts \(ELA\) Literacy District Leaders Network](#)
- [Health and Physical Education Advisory](#)
- [History-Social Science Professional Development Opportunities](#)
- [Math Leaders Network](#)
- [Leading Mathematics: An Administrator's Approach to Transforming Mathematics Education](#)
- [Science Leaders Network](#)
- [San Diego Arts Leadership Community](#)

### **Assessment**

- [Data and Assessment Network](#)



### **Other Areas of Support at SDCOE**

- [Charter School Services Professional Development Opportunities](#)
- [College and Career Readiness](#)
- [Community Schools](#)
- [Curriculum and Instruction \(C&I\) Leaders Network](#)
- [Educational Technology](#)
- [Equity](#)
- [Expanded Learning](#)
- [Instructional Materials at the Learning Resource Display Center](#)
- [Library Media Services](#)
- [School Counselor Leadership Network](#)
- [SDCOE Expanded Learning Consortium](#)
- [Whole Child and Community Design](#)
- [Health and Well-Being](#)
- [School Nursing](#)
- [School Safety](#)
- [Supporting Special Populations](#)
- [State and Federal Programs](#)
- [Universal Design for Learning](#)
- [Whole Child and Community Design](#)