

New School Pre-Opening Checklist

This document is intended to serve as a guide for staying on track with all of the pre-opening actions required to open a charter school. Use this document as a guide for ensuring that all requirements are met timely.

| December | | |
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| Item | Notes/Requirements | Verification (Mark as Complete) |
| Performance Certificate executed. Please note, any adjustments the board may want to make to this content require an amendment of the certificate. Contact Jared Dawson with questions. | Fully executed copy on file with the PCSC. | |
| Bylaws executed. | Executed copy of bylaws and meeting minutes evidencing adoption. | |
| Articles of Incorporation (to be filed with Secretary of State). | Executed Copy. PCSC will verify this online. | |
| Board Term Sheet/ Conflict of Interest Statement / Code of Ethics (33-5200 ; 74-404) | Signed by Each Board Director when applicable. Must have either a separate conflict of interest statement signed by each director, or board bylaws must note compliance with statutes 33-5200 and 74-404. | |
| Independent Legal Counsel Secured | Meeting Minutes evidencing Approval of Engagement | |
| 501c3 (file the IRS form 1023. This is a lengthy application and costs approx. \$1K. Please work with your legal counsel.) For planning purposes - the 1023 application requires that documentation such as executed bylaws, conflict, and articles of incorporation are already finalized. | Approval or Interim Approval letter from the IRS (the final letter can take months to arrive, for most purposes the interim letter is sufficient) | |

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| Bank account established; signatories identified (best practice is 2 required, 3 identified); EIN established (state Tax ID number); DUNS number established (required for eligibility to receive government dollars; Comprehensive recruitment plan | | |
| Compliant and Accessible Student Enrollment Application (considers potential language barriers a/o access to technology as well as efficiency and security of data collection). | Verified online | |
| Board Meeting Calendar (high level evidence that the board is planning for key work such as, administrator evaluation process, academic performance review, the audit report, etc.) | | |
| Looking forward to February | | |
| Staffing plan should be fully established and comprehensive. This should reflect enrollment projections, anticipated demographics, model specific needs, and budgets. It should also include clear trigger points for hiring prior to the first year (i.e. how will you know you can hire a 2nd teacher or a counselor and how will you balance that with the natural hiring season?) | See IDAPA 08.02.02 for staffing certification needs | |
| Job descriptions for general positions are generally representative of duties. A full collection of job descriptions is available from the ISBA with membership. | See IDAPA 08.02.02 for staffing certification needs. Verified online. | |

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| Release of Information on Past Job Performance. Ensure that you have a plan for checking references and documenting fair hiring practices, prior to hiring any employee (including admin). This generally includes board adoption of policy before you can interview. | | |
| Provide an update on the schools technology plan/progress. | | |
| Stakeholders must have adequate access to appropriate school personnel. Many schools adopt communication/grievance procedures that include clear documentation. This will also require that the staff reporting structure is clear. | Website provides a clear org chart and contact information as well as board meeting process descriptions. | |
| Curriculum Selection Process (should evidence research and stakeholder input as well as a plan for regular review regarding efficacy) | Consider I.C. 33-512A | |
| Home Language Survey (a section of the registration paperwork) SDE has a statewide required document | | |
| Job Descriptions for Board Officers (chair, secretary, treasurer, etc.) and Committees (governance, academic, finance, etc.) | | |
| Meeting Agendas posted Accurately | | |
| Board Meeting Minutes (format consistent, content sufficient, see open meetings law) | | |
| Board Member Succession, Orientation, and Termination Process | | |

February

| Item | Notes/Requirements | Verification (Mark as Complete) |
|---|---|---------------------------------|
| Policy adoption progress review | Provide copies/ or digital access to all board approved policies to date | |
| PO Process Outlined (for admin, board, and staff if different) | | |
| Reimbursement request forms and process established | | |
| Records Request process. It is common to include the reference to the applicable statute on the document. See I.C. 33-209 | | |
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| Notification of lottery date posted three months prior to lottery (08.02.04 Rules Governing Public Charter Schools - Section 203.02) | | |
| First offer notification for enrollment and enrollment expiration process is developed | | |
| Registration paperwork is compliant (08.02.04.203.04) | | |
| Student record receipt and processing practices should be ready to go | This will be a significant amount of time after the lottery, and it will matter that you have clear procedures before you begin | |
| Salaried and hourly contracts established and compliant; Salary scale developed | | |
| Time-off request forms/ process developed | | |
| Contact the Federal Programs Office (Elmira Feather) at the SDE and notify them of your school's primary contact. They will get you set up with a login in for their system. In March you'll provide an estimate of low income students and in April you'll be able to see an estimated | | |

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| allocation. If you choose to take this allocation, formal reporting is due by end of June. | | |
| Annual Budget Approval Process - Review the SDE template for newspaper publication. | Must have a hearing 30 days prior to the July regular meeting for each school. Budget must be approved by July and is due to the PCSC and the SDE in July. | |

| April | | |
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| Item | Notes/Requirements | Verification (Mark as Complete) |
| Policy adoption progress review | Bring copies/ or digital access to all board approved policies to date | |
| Student information system implementation update | Provide PCSC with information about which system is used, timeline for implementation, and who is managing the system set up | |
| Payroll and timecards systems adopted; Health Benefits secured; Retirement Benefits secured | | |
| Substitute process established | | |
| New Hire process established | Paperwork, legal, payroll, benefits, etc. | |
| New Hire Orientation established | Should consider certified and classified staff and evidence plans for beginning of year as well as mid-year hires | |
| Establish Annual calendar, daily schedule, Stakeholder Reporting Calendar | Should evidence report cards, state of the school address, stakeholder survey timelines, etc. Provide copy of calendar published to parents to PCSC. | |
| Principal's Report (to Board) Plan (i.e. data dashboard) | Best practices include a standard set of data reported to the governing | |

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| | board by the school principal each meeting. This data should reflect progress toward established goals, and attempt to reflect the board's administrator evaluation process. | |
| Community Meeting Plan (assemblies) and Community Event Plan (student work showcases, conferences, etc.) established | | |
| School-wide professional development plan established | Should include with time sufficiently reflected in the calendar and daily schedule | |
| Teacher coaching plan | Reflecting how individual needs will be met beyond the school-wide PD plan | |
| Formal teacher evaluation tools established | | |
| Special Education Director and 504 coordinator identified | | |
| NSLP application approved (if applicable) | | |
| Common behaviors descriptions are communicated | Transitions between classes, bathrooms, cafeteria, etc. when published as part of the school's handbook | |
| Positive Behavior Plan | This is in extension of the formal discipline policies and should evidence the school's day to day philosophy and procedures for classroom management | |
| Extracurricular plan and after school care plans established | | |
| Review the estimated federal programs allocation, provided by the federal programs department and decide whether you intend to pursue the funds | | |

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| Review of readiness for special education | Please bring meeting minutes evidencing adoption of the special education manual and special education policies, | |
| Board Member Training | When required, evidence that all board members have completed the required trainings and a copy of the year 1 development plan is due to the PCSC | |
| Building maintenance safety check | | |
| Materials Safety Data Sheet (MSDS) utilized appropriately through the school (applicable to high schools or science-specific elementary schools) | Any chemicals need to be stored appropriately and usage must be tracked according to these guidelines. Mostly applies to chemistry supplies but may also apply to janitorial or art supplies. This will matter for fire safety and health inspections. verify that your school is compliant if applicable | |
| Playground safe practices outlined | Student expectations for outdoor play and supervision plan/expectations. Document should reflect how this information is presented to teachers/students or playground attendants | |

| June | | |
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| Item | Notes/Requirements | Verification (Mark as Complete) |
| Child Find, RtI and at-risk identification procedures | Provide copies to PCSC when documented | |
| School Leader Evaluation Tools | | |

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| Transportation Contract Executed | Meeting Minutes evidencing contract award or authorization for signatory | |
| Landscaping/Snow Removal Contract Executed | Meeting Minutes evidencing contract award or authorization for signatory | |
| Special Services (speech, OT, etc.) Identified and retained | Meeting Minutes evidencing contract award or authorization for signatory | |
| Independent Auditor Contract Executed | Meeting Minutes evidencing contract award or authorization for signatory | |
| IT Contract Executed (if applicable) | Meeting Minutes evidencing contract award or authorization for signatory | |
| D&O Insurance Policy, Property and Liability Insurance, and Worker's Compensation Insurance Secured | Insurance binder evidencing these items are secured with a company authorized to do business in Idaho | |
| Monthly finance reports established for board Family orientation, new student beginning of year and new student mid-year processes developed | | |
| Process for identifying and preparing for the needs of incoming students with disabilities | Discussion regarding who /when/how incoming records are being evaluated and who /when follow-up with previous school and family is happening. | |
| Assessment Coordinator Identified | | |
| ELL coordinator identified | Discussion regarding how many students the school expect to serve, who is trained, and what the plan is for being ready to serve these students on day 1. | |
| Asset tracking and Materials Receipt Process | | |
| Drop off and dismissal procedures established | Evidence should reflect how this information is shared | |

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| | with families as well as supervision expectations | |
| FRL application process established | | |
| Vended Program Contract Executed or Food and Milk Vendors Contracts Executed | | |
| Crisis Management Plan | <p>Review with your local emergency responders the summer before opening; start early as a quality plan will take several months to develop (plan should include training materials, quick reference guide, evacuation maps, recovery plan, roles of incident team personnel, communication plan, and drill tracking document)</p> <p>PCSC will need a copy of your "Incident Team" org chart with roles defined We will also need to be included on your emergency notification system (whether that is text system, phone tree, or email distribution system). Building inspection reports due within 30 days before school initially opens, and within 7 days of receipt afterwards</p> | |
| Charter School Advanced Payment Request Awareness | Contact SDE | |
| Transportation Advance Payment Request Awareness | Contact SDE | |
| Special Education Assurances Filed with SDE Awareness | Contact SDE | |
| Formal Reporting with Federal Programs Department is due in June | | |

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| for the upcoming school year | | |
| Building Reconfiguration Form: anytime a school changes the grade levels served, or makes a significant change to the building this form needs to be filed with the Idaho School Safety and Security department of the Division of Building Safety | Contact Mike Munger | |

July 1 of the school’s approved certification year marks the date that the school is considered operational by the SDE.