

New School Pre-Opening Checklist

School: _____ Anticipated Opening: _____

This checklist is organized around the IPCSC December, February, April, and June pre-opening conversations. This checklist is designed to be used in conjunction with the IPCSC Pre-Opening Questions. Schools should use the checklist to track readiness activities and documentation in advance of the December, February, April, and June pre-opening meetings. The Pre-Opening Questions will guide discussion with IPCSC staff during each meeting.

December Pre-Opening Checklist

Item	Notes / Requirements	Complete
Performance Certificate	Execute the Performance Certificate. Any desired changes require an amendment; contact an IPCSC Program Manager with questions.	☐
Finance policy and internal controls	Review the school's finance policy, with particular attention to internal controls.	☐
Banking and identification numbers	Establish the school bank account and identify signatories. Best practice: two signatures required and three signatories identified. Establish required tax/federal identification information.	☐
Salary scale	Develop a salary scale that considers fair hiring practices and local hiring competition.	☐
Bylaws and Articles of Incorporation	Execute the bylaws and file the Articles of Incorporation with the State.	☐
Board ethics and conflicts	Complete the Board Term Sheet, Conflict of Interest Statement, and Code of Ethics; obtain required board member signatures.	☐
Independent legal counsel	Secure independent legal counsel.	☐
Nonprofit tax-exempt filing	Address the school's federal tax-exempt filing with legal counsel, as applicable.	☐
Board meeting calendar	Develop a board meeting calendar that anticipates key work such as administrator evaluation, academic performance review, and the audit report.	☐
Board agendas	Establish a process to ensure board meeting agendas are posted accurately.	☐
School safety coordination	Connect with the School Safety team at OSBE early in the facility process and prepare for applicable safety, security, maintenance, and egress reviews.	☐

Item	Notes / Requirements	Complete
Procurement	Review procurement requirements before nutrition, transportation, IT, and other significant purchases or contracts.	☐
Staffing plan	Develop a comprehensive staffing plan aligned to enrollment projections, anticipated demographics, the school model, and budget. Include clear hiring trigger points.	☐
Job descriptions and hiring practices	Develop job descriptions and a process for reference checks/Release of Information on Past Job Performance. Establish and document fair hiring practices before hiring employees, including administrators.	☐
Curriculum selection process	Develop a curriculum selection process that reflects research, stakeholder input, and a plan for regular review of efficacy.	☐
Technology plan	Document progress on the school's technology plan and implementation.	☐
Stakeholder access and reporting structure	Establish clear access to appropriate school personnel, communication/grievance procedures, and a clear staff reporting structure.	☐
Recruitment plan	Develop a comprehensive student recruitment plan.	☐
Enrollment application and Home Language Survey	Develop a compliant, accessible enrollment application that considers language barriers, technology access, efficiency, and data security. Include the Home Language Survey in the registration process.	☐
Lottery and enrollment offers	Post required lottery information and establish the first-offer notification and expiration process.	☐
Registration paperwork	Confirm that registration paperwork and processes are compliant.	☐
Assessment and data analysis	Develop a data analysis and/or assessment plan.	☐

February Pre-Opening Checklist

Item	Notes / Requirements	Complete
Purchase orders and reimbursements	Establish purchase order processes for administrators, board members, and staff as applicable, along with reimbursement request forms and procedures.	☐
Kitchen and nutrition readiness	Review kitchen capital purchases and coordinate with the Idaho Department of Education Nutrition program regarding food safety, service, and point-of-sale requirements.	☐
Records request process	Establish a records request process and include applicable statutory references where appropriate.	☐
Student records	Establish procedures for receipt, review, and processing of student records before the post-lottery workload begins.	☐
Employee contracts	Confirm salaried and hourly employee contracts are established and compliant.	☐
Time-off process	Develop time-off request forms and procedures.	☐
Playground safety	Document playground safety practices, outdoor supervision expectations, and how expectations will be communicated to staff and students.	☐
Medication administration	Develop a medication administration plan, including applicable policy, administration tracking, parent authorization, and procedures for staff administration or student self-administration.	☐
Federal programs	Identify the school's primary federal programs contact and coordinate with the Idaho Department of Education regarding system access, low-income estimates, allocations, and reporting.	☐
Annual budget process	Review the annual budget approval process, including required notice/publication, hearing, board approval, and submission deadlines.	☐
Materials Safety Data Sheets	Establish procedures for appropriate chemical storage, tracking, and use of Safety Data Sheets, as applicable.	☐

April Pre-Opening Checklist

Item	Notes / Requirements	Complete
Facility and occupancy	Describe progress toward executing the facility plan and the anticipated occupancy date. Prepare for the IPCSC pre-opening site visit after occupancy.	☐
Board policies	Continue policy adoption and provide IPCSC access to adopted policies for compliance review.	☐
Board training	Identify board training completed since approval and the timing of the board's annual meeting.	☐
Charter start boot camp	Identify who attended charter start boot camp and any questions or feedback arising from the training.	☐
Enrollment by grade	Provide current accepted enrollment offers by grade level.	☐
Registration and records requests	Describe how registration information is collected, how acceptance is documented, and when records will be requested from prior schools.	☐
Student information system / ISEE readiness	Identify the student information system, the person responsible for setup, and implementation status. Plan to run sample reports before required ISEE reporting.	☐
Grading practices	Establish grading terms and grading practices.	☐
School culture and events	Develop plans for school-wide assemblies, cultural experiences, and recurring community or student events.	☐
Behavior expectations	Establish common student behavior expectations and a consistent plan for teaching them across classrooms.	☐
Positive behavior plan	If used, develop the school-wide positive behavior plan and implementation approach.	☐
Extracurricular activities	Identify planned clubs, sports, or other extracurricular opportunities.	☐
Before/after-school care	If partnering with a care provider or renting space, address facility use, insurance, and funding limitations.	☐
Teacher orientation and training	Develop a teacher orientation/training plan with adequate pre-opening and ongoing training time. Provide the training schedule.	☐
Administrator evaluation training and teacher coaching	Confirm the administrator has completed applicable teacher-evaluation training and identify any additional teacher coaching supports.	☐

Item	Notes / Requirements	Complete
Special education leadership and transition	Identify qualified special education leadership, timing for student-file review, and plans for transition meetings for students receiving special education services.	☐
Curriculum map and first two weeks	Prepare a draft curriculum map for June and ensure the first two weeks of instructional plans will be ready for the pre-opening site visit.	☐
Substitutes	Develop a substitute staffing process and confirm applicable certification requirements.	☐
Staff recruitment and hiring	Provide an update on staff recruitment and hiring.	☐
Payroll, timecards, benefits, and PERSI	Identify who will manage payroll and timecards; confirm health benefits and PERSI readiness.	☐
New employee intake and records	Establish new-employee intake, paperwork, and employee-file procedures.	☐
Grant applications and federal programs	Prepare for applicable consolidated federal/state grant applications and determine whether the school will participate in federal programs.	☐
Financial transparency	Establish processes for board approval and public posting of required expenditure reports and contracts.	☐
IPCSC reporting and notifications	Establish a process for prompt reporting to IPCSC under I.C. § 33-5205B, including material noncompliance, governing-document changes, accreditation deficiencies, complaints/lawsuits, board changes, and early warning signs of distress.	☐
IPCSC monitoring information	Be prepared to provide information necessary for IPCSC's ongoing monitoring of performance and legal compliance.	☐
State reporting calendar	Review applicable Idaho Department of Education reporting calendars and ensure appropriate staff are on relevant mailing lists.	☐
Principal reporting to the board	Develop consistent expectations for the information and performance data the school leader will report to the governing board.	☐
Section 504	Identify who will manage Section 504 responsibilities.	☐
School meals	If providing federally reimbursable meals, document application and program-development progress.	☐
Building maintenance and safety checks	Identify responsibility and frequency for routine interior and exterior building maintenance and safety checks.	☐

Item	Notes / Requirements	Complete
School calendar and schedule	Finalize the school calendar and daily/weekly schedule and provide the requested schedule to IPCSC.	☐
Website readiness	Ensure required school documents are posted on the website, including the Performance Certificate, IPCSC annual reports, annual board-approved budget, and Strategic Performance Plan, as applicable.	☐

June Pre-Opening Checklist

Item	Notes / Requirements	Complete
Facility and occupancy	Provide an updated facility-plan status and anticipated occupancy date.	☐
Facility changes after occupancy	Establish a process to notify IPCSC and the Idaho School Safety team at OSBE of significant facility changes after occupancy, as applicable.	☐
Board policies	Provide an update on remaining board policy adoption.	☐
Board training	Provide an update on governing-board training completed since the prior pre-opening meeting.	☐
School leader evaluation process	Define the school leader evaluation process, including goal setting, mid-year progress review, and end-of-year summative evaluation.	☐
Independent auditor	Identify the school's independent auditor.	☐
Enrollment by grade	Provide current accepted enrollment offers by grade level.	☐
Special-services estimate	Estimate the percentage/number of incoming students likely to need special services and identify readiness implications.	☐
First two weeks of school	Describe the instructional and operational plan for the first two weeks of school.	☐
Family orientation	Describe the family orientation process before opening.	☐
Mid-year student orientation	Establish an orientation process for students who enroll after the school year begins.	☐
Student information system	Provide an update on SIS setup and readiness to run sample reports before required ISEE reporting.	☐