

July 2026		
1	Finance  - Board Adopted Annual Budget - Local Control Funding Formula (LCFF) Calculator - Updated/New Bonds and Contracts Copies - Accounting & Financial Policies & Procedures (if changed) - Updated List of Fiscal Contact(s) & Business Operations Manager(s) (BOMs) - Updated/New Lease and/or Facility Use Agreement (FAU) - Form 990	Finance Submit Beginning of Fiscal Year Documents to Charter Fiscal Admin Using This Link for Reportwell <i>Please direct Finance questions to:</i> Shallu Sharma
	Attendance  2026-27 Board Approved Attendance Calendar	Attendance Submit to SCCOE District Business Services
	Program Governance  - Updated List of Directors & Officers - Updated Contact Information for School(s) (<i>also post on school website</i>) - Conflict of Interest (COI) Code Updates (if any) - Most recent Biennial COI Review Form (2026 version) - Charter Regular Board Meeting Schedule (<i>also post on school website</i>) - Charter Bylaws Updates (if any) - Complete Local Control Accountability Plan (LCAP) Package including: - Board Approval LCAP - Dashboard Local Indicators Approval - Annual Update for 2025-26 LCAP - Goals and Actions for 2024-28 LCAP - Action Tables (plus Excel Workbook) - Budget Overview for Parents - Federal Addendum (if applicable) - LCAP approval documents (agenda/minutes) - Board Packets (Agendas, Minutes, Documents) for each meeting as they occur*** NEW Parent Involvement - School Year Calendar - Master Schedule – including credential info - Bell Schedule - Instructional Minutes Calculation showing compliance with required minutes	Program Submit to Charter Program Admin Using Reportwell. <i>Please direct Program questions to:</i> Michelle Johnson, Ed.D.

July 2026		
	Health & Safety - Updated Student/Parent Handbook - Updated Employee Handbook - Certificate of Occupancy, if required	
3	Authorizer Offices Closed – Independence Day Observed	
8	Attendance Annual Attendance Prior Year	Attendance Submit to SCCOE Internal Business Services
15	Finance Pupil Estimate for New or Significantly Expanding Charter (PENSEC) Report <i>(also submit electronically to California Department of Education (CDE))</i>	Finance Submit to Other Reports to Charter Fiscal Admin Using This Link
	Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
15	Santa Clara County Board of Education (SCCBOE) Meeting	
20	Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link

August 2026		
3	Annual Visits - List of Required Documents for Annual Visits (see July and January List) Finance - Proof of Insurance (Complete Policy per MOU)	Annual Visits Distribution FROM SCCOE to Charter Schools (included in this calendar) Finance Submit Beginning of Fiscal Year Documents to Charter Fiscal Admin Using This Link
6	SCCBOE Meeting	
14	Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
20	Finance	Finance

August 2026		
	- Monthly Financial Reports - Revised Budget (45-day revise, if needed)	Submit Monthly Reports to Charter Fiscal Admin Using This Link Submit to Other Reports to Charter Fiscal Admin Using This Link
21-28	Getting to Know You SCCOE Charter Schools Department Welcome Back to School Visits	

September 2026		
2	SCCBOE Meeting	
2	Program List of classes for semester, including teacher assignments, credentials, and teacher vacancies** using the excel template received from the SCCOE credential office	Program Submit to Charter Program Admin Using Reportwell Portal.
7	Authorizer Office Closed – Labor Day	
15	Finance Prior Year Unaudited Actuals	Finance SACS Web System Application
15	Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
16	SCCBOE Meeting	
21	Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link

October 2026	
1	CALPADS & CBEDS Submission Window Opens for Fall 1
1	SCCOE Charter Leaders Meeting – In Person: 1:00-3:00 p.m.
7	SCCBOE Meeting

October 2026		
15	Attendance - Attendance for the Prior Month Finance 20 Day Attendance Report (Only if PENSEC report is submitted)	Attendance Submit to SCCOE Internal Business Services Finance Submit to Other Reports to Charter Fiscal Admin Using This Link
20	Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link
21	SCCBOE Meeting	

November 2026		
4	SCCBOE Meeting	
11	Authorizer Offices Closed – Veteran’s Day	
16	Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
18	SCCBOE Meeting	
20	Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link
26-27	Authorizer Offices Closed – Thanksgiving Day & Day After Thanksgiving	

December 2026		
10	SCCBOE Meeting	
15	Finance - First Interim Financial Report - Annual Audit Report for the Prior Fiscal Year (FY)	Finance Submit to Other Reports to Charter Fiscal Admin Using This Link

December 2026		
	Attendance - Attendance for Prior Month Program - List of classes for semester 2, including teacher assignments, credentials, and teacher vacancies**	Attendance Submit to SCCOE Internal Business Services Program Submit to Charter Program Admin Using Reportwell Portal.
16	SCCBOE Board Meeting – Organizational Meeting	
20	Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link
24-25	Authorizer Offices Closed – Christmas Eve & Day	
31	Authorizer Offices Closed – New Year’s Eve	

January 2027		
1	Authorizer Offices Closed - New Year’s Day	
4	Annual Visit Window Opens - Remaining Annual Visit Documents Finance: FCMAT Charter School FHRA Tool Submission <i>(Submission Window January – March)</i> Program Governance - Updated Organizational Chart - Board Roster and contact information, board committee members and assignments, term expirations, designated parent representative - Updated Board calendar - Articles of Incorporation (if updated) - Updated policies and procedures (if any recent updates) - Conflict of Interest (COI) Code (if updated or if not previously submitted) - COI Biennial Review Form (if updated or not previously submitted)	Finance Submit to Other Reports to Charter Fiscal Admin Using This Link Program Submit to Charter Program Admin Using Reportwell Portal.

January 2027

	<u>Enrollment</u> • Copy (pdf) of current Lottery and/or Enrollment Application • Current lottery process and detailed procedures • Current enrollment disaggregated by student group (grade level, English Learner (EL), Students with Disabilities (SWD), Socioeconomically Disadvantaged (SED), ethnicity, etc.) <u>Instruction</u> • English learner plan • Internal verified assessment data disaggregated (grade level, EL, SWD, SED, ethnicity, etc.) for ELA and Math • Professional Development Plans with examples <u>Parent Involvement</u> • English Learner Advisory Council (ELAC) agendas and minutes • School Site Council agendas and minutes • Evidence of education partner input in LCAP (i.e., meeting notes, survey information, etc.) <u>Health and Safety</u> • Certificate of Food Safety (i.e., SafeServ certification) • Health and safety policies • Internal annual facility review	
4	CALPADS & CBEDS Submission window opens for Fall 2024 Attendance • P-1 Attendance Report	Attendance Submit to SCCOE Internal Business Services
15	Attendance • Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
15	CALPADS Fall 1 Amendment	
18	Authorizer Offices Closed – Martin Luther King, Jr. Day	
20	SCCBOE Meeting – Tentative	
20	Finance • Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link

January 2027

28	SCCOE Charter Leaders Meeting – Virtual 1:00 – 3:00 p.m.
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February 2027

1	Program School Accountability Report Card (SARC) Report (<i>also post to school and CDE websites</i>)	Program Submit to Charter Program Admin Using Reportwell Portal.
3	SCCBOE Meeting - Tentative	
11	Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
12-15	Authorizer Offices Closed – Lincoln’s Birthday (Observed) and President’s Day	
17	SCCBOE Meeting - Tentative	
19	Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link

March 2027

1	Program Comprehensive School Safety Plan including evidence of first responder review	Program Submit to Charter Program Admin Using Reportwell Portal.
3	SCCBOE Meeting - Tentative	
13	Data Book - Data Book Information Form Finance - Second Interim Financial Report	Data Book Submit to Charter Schools Dept. Using This Link Finance Submit to Other Reports to Charter Fiscal Admin Using This Link

March 2027		
	Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
17	SCCBOE Meeting - Tentative	
19	CALPADS Fall 2 Certification Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link
31	Finance Auditor Selection Form	Finance Submit to Other Reports to Charter Fiscal Admin Using This Link

April 2027		
1	Program Completed Form 700(s) for current year for all indicated on Conflict of Interest, including those entering and exiting positions	Program Submit to Charter Program Admin Using Reportwell Portal.
15	Annual Visit Window Closes Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
14	SCCBOE Meeting - Tentative	
20	Finance - Monthly Financial Reports Attendance - P-II Attendance Report	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link Attendance Submit to SCCOE Internal Business Services

May 2027	
5	SCCBOE Meeting - Tentative

May 2027		
14	Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
20	Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link
19	SCCBOE Meeting - Tentative	
20	SCCOE Charter Leaders Meeting – Format TBD: 1:00-3:00 p.m.	
24	Authorizer Offices Closed – Memorial Day	

June 2027		
TBD	2025-2026 Data Book Presentation to the SCCBOE	
9	SCCBOE Meeting - Tentative	
15	Attendance Attendance for the Prior Month	Attendance Submit to SCCOE Internal Business Services
16	SCCBOE Meeting - Tentative	
19	Authorizer Offices Closed – Juneteenth	
22	Finance Monthly Financial Reports	Finance Submit Monthly Reports to Charter Fiscal Admin Using This Link

**Charter School shall provide the SCCOE with a list of classes evidencing the class offerings for the semester and the teacher(s) assigned to each class including credentials, specifying any class(es) for which a teacher is not yet assigned, which information shall be updated upon assignment of a teacher to each class.

***Charter School shall provide the SCCOE with the Charter Board packets (agendas, minutes, and documents) prior to each charter board meeting. (NEW)