Charter Oversight Document Request

Note: Please submit requested documents by January 1 (some documents will have been submitted earlier in year – if previously submitted, no additional submission necessary unless changed). Schools that do not submit documents will be rescheduled.

A: Document Request List - Review of Submitted *Current* Documents

Governance/School Operations and Management
☐ Updated Copies of By-Laws, Board Roster, Policies (if changed)
☐ Biennial Conflict of Interest Code Form ("COI") and date last reviewed by County Supervisors
☐ Organization Chart
☐ Updated List of Directors and Officers
☐ Comprehensive Site Safety Plan (updated by March 1 each year)
☐ Board Approved Local Control Accountability Plan (LCAP) with all updates and components
☐ School Accountability Report Card (SARC) and also posted to school website
☐ Budget/ Submission of all Budget Reports (see additional Fiscal/Operational document request list)
☐ Copies of Form 700s for all listed positions in COI (board, executives, site leadership, etc.)
☐ Board meeting calendar scheduled for year
☐ Date of Last Board Training (Brown Act, Ethics, Conflicts, etc.) as to be held annually

Enrollment
☐ Current enrollment (by grade, gender, ethnicity, EL status, special education)
☐ Recruitment and Lottery Plan/Calendar
☐ Recruitment notices
☐ Copy of application for lottery
☐ Copy of enrollment packet
☐ Copy of plan to balance racial/ethnic, special education, English Learner populations with district

Instruction
☐ Curriculum Maps
☐ Professional Development Plans
☐ Disaggregated Student Academic Performance Data (grade, gender, ethnicity, ELL, special education)
☐ Current English Learner Instructional Plan
☐ Current English Language Development Plan
☐ School Calendar and Bell Schedule
☐ Attendance Calendar
☐ Updated Contact Information for School(s) (also post on school website)

<u>Financial/Operational</u>

☐ Board Adopted Annual Budget

☐ LCFF Calculator

☐ Copies of all Bonds and Contracts

☐ Proof of Insurance (Complete Policy)

☐ Accounting & Financial Policies & Procedures (if changed)

☐ Updated list of Fiscal Contact(s) and Business Operations Manager(s) (BOMs)

☐ Updated/New Lease and/or Facility Use Agreement (FAU)

☐ Form 990

☐ Pupil Estimate for New or Significantly Expanding Charter (PENSEC) Report – if applicable

☐ First Interim Financial Report (By December 15 each year)

☐ Second Interim Financial Report (By March 15 each year)

☐ Annual Audit Report for Prior Fiscal Year (By December 15 each year)

B: SCCOE Review of Charter School Web Site

Student/Parent Handbook

☐ Uniform Complaint Procedures and Forms

☐ Suspension/Expulsion Policy

☐ Title IX policy

☐ School Contact Information

☐ Assurance that parent volunteering is not mandatory

☐ Student safety process

Enrollment Procedures

☐ Current Application forms

☐ Admission Requirements

☐ Copy of lottery application form (many are only available to parents if they create an account)

☐ Lottery selection process

☐ Required notices to parents and students regarding disenrollment

Governance

☐ Board meeting agendas /minutes

☐ ELAC meeting agenda (as appropriate)

☐ Board agenda prominent link on front page of school website

☐ School Accountability Report Card (posted by February 1 each year)

School Performance Indicators

☐ SARC (current by Feb 1 and posted to school website)

☐ LCAP (current by July 1 and posted to school website)

C: Day of Visit

☐Available Special Education folders (random selection by SCCOE of files)

☐School Emergency/Safety Plan

☐Available 504 documents

☐Classroom Visitations

☐Meetings with students/teachers/parents (each group separate interviews without school staff present)

☐Discussion regarding Requested Documents

☐Topics: Means to Achieve Reflective Racial/Special Education/English Learner Balance, LCAP, Parent and Staff Involvement, Instructional Practices, Services to Special Populations

D: Human Resources (Documents must be submitted to HR by Sept 20)

☐List of site administrators and teachers no longer employed at school – include names, SSN#, date of birth, contact information

☐Alphabetical list of current teachers teaching core classes – include their SSN#, date of birth, address, phone number, email address

☐Alphabetical list of current teachers teaching non-core classes – include their SSN#, date of birth, address, phone number, email address

☐Copies of certificate of compliance for teachers of non-core classes deemed Core by NCLB regulations

☐Master Schedule for Site – include teacher's name, assignment of the teacher (Core, subject, grade taught, period by period), denote classes having at least one student who requires EL services assigned