

Charter Transfer Onboarding Checklist

I. Governance and Management

Item	Action Item	Acceptable Documentation	Submitted
1	Names of Board of Directors have been listed on school website	<ul style="list-style-type: none"> A link to school's webpage listing Board members and a method to contact the board 	
2	Expanded criminal history and child protection index checks for all Board members	<ul style="list-style-type: none"> Signed assurance that the organizer has completed the required expanded criminal history and child protection index checks for Board members, members of any subcommittee to which the organizer has delegated some authority regarding the charter school, and school leadership NOTE: For the duration of the school's operation, background checks must be completed 14 days prior to the approval of any new Board members or staff 	
3	By-laws have been ratified	<ul style="list-style-type: none"> Copy of ratified by-laws or a board resolution approving by-laws, if a ratified copy was not submitted with the original charter application or if changes have been made to the by-laws since application submission 	
4	Statement of Economic Interest and Conflict of Interest for all Board members	<ul style="list-style-type: none"> Signed form for each active Board member and verification of submission to ICSB and IDOE. 	
5	Leadership roles in the school have been filled	<ul style="list-style-type: none"> Updated organizational chart with names of individuals occupying key leadership roles Resume for the hired head of school(s) 	
6	Management contract with Educational Management Organization (if applicable) has been executed	<ul style="list-style-type: none"> Draft management contract must be submitted to the ICSB Executive Director for approval. Once contract has been approved, a copy of executed management contract 	

II. Staffing

Item	Action Item	Acceptable Documentation	Submitted
7	Staff hired in accordance with application staffing plan.	<ul style="list-style-type: none"> Updated staffing plan with names of specific individuals occupying instructional positions, including licensing information for each individual. 	
8	Special education and/or MLL personnel have been hired or contracted out.	<ul style="list-style-type: none"> Assurance that the school has hired or contracted with certified Special Education staff, speech and language therapists, occupational and physical therapists, and/or any other staff as required to meet the needs of enrolled students. If services will be contracted, the school must provide a copy of the signed contract Assurance that the school has hired or contracted with qualified English Language Learner staff as required to meet the needs of enrolled students. If services will be contracted, the school must provide a copy of the signed contract 	
9	Employment policies (including the dispute/complaint resolution process and expanded criminal history and child protection index policy) have been established and made available to staff.	<ul style="list-style-type: none"> Employee Handbook and evidence of distribution to staff. Expanded criminal history and child protection index policy. 	
10	Expanded criminal history and child protection index checks for all staff members and volunteers (including parents) who are likely to have direct, ongoing contact with children within the scope of the individuals' employment/duties.	<ul style="list-style-type: none"> Signed assurance that the organizer has completed the required expanded criminal history and child protection index checks for all staff members and volunteers. NOTE: For the duration of the school's operation, these background checks must be completed within 14 days of hiring any new staff or the use of volunteers in school 	
11	Each employee has a job description which he or she has	<ul style="list-style-type: none"> Job descriptions. 	

	read and agreed to, and signed contract on file for each teacher.		
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III. Curriculum and Instruction

Item	Action Item	Acceptable Documentation	Submitted
12	Student records are available to teachers for planning.	<ul style="list-style-type: none"> Evidence that a student roster and student records are on file and accessible to teachers for planning. Written assurance from the school 	
13	School Reading Plan(s)	<ul style="list-style-type: none"> School Reading Plan(s) for K-8 in accordance with IC 20-32-8.5 	

IV. Students and Parents

Item	Action Item	Acceptable Documentation	Submitted
14	Student admissions (including lottery procedures), enrollment, and intake procedures have been identified, including transfer of student records, and the procedures used to identify students with disabilities.	<ul style="list-style-type: none"> Admissions/Enrollment Policy (if different from Policy submitted with Charter Application) including a clear description of the following: enrollment deadlines, capacity by grade level (per the charter agreement), enrollment limitations as allowed under Indiana's charter statute (i.e., sibling preference), and the procedure and timeline for working through a lottery process if necessary 	
15	Families and students have been, or will be, provided with relevant information about the school.	<ul style="list-style-type: none"> Upcoming school year Student and Family Handbook, which includes, at a minimum: the school's discipline policy; notice of parental rights under the Family Educational Rights and Privacy Act ("FERPA"); school health record procedures; dispute/complaint resolution process; and 	

		<ul style="list-style-type: none"> • 5) the right of individuals to attend Board meetings. 	
16	Procedures are in place for creating, storing, securing and using student academic, attendance, discipline, and test records.	<ul style="list-style-type: none"> • Evidence that a suitable electronic data system is in place (e.g., PowerSchool). • Evidence of locked and/or secured electronic storage • Written assurance from the school 	
17	Student health records are separate from academic records and are in locked storage in the office of the school nurse or other appropriate location.	<ul style="list-style-type: none"> • Evidence of separation in locked and/or secured electronic storage • Written assurance from the school 	

V. Operations

Item	Action Item	Acceptable Documentation	Submitted
18	Appropriate provisions have been made for transportation in compliance with federal law, including homeless students and students whose IEP requires transportation as a related service.	<ul style="list-style-type: none">• Transportation Plan.• Agreement with provider of supplemental transportation services.• Signed assurance that the organizer has conducted expanded background checks for employees of the supplemental transportation services provider	
19	Written plans for safety procedures, including fire drills and emergency evacuation, consistent with Indiana's Health and Safety Standards (IC 20-34).	<ul style="list-style-type: none">•• Evidence that the Department of Public Works has been contacted and a request has been made for the installation of school zone/speed limit signs.	
20	Provisions have been made for required health services and screenings, including immunization records.	<ul style="list-style-type: none">• Evidence that health services are available (e.g., school nurse on staff or contract, contract with health care clinic).• Medication administration policy.• Written plan for providing required health services (e.g., student hearing and vision).• Immunization records or proper exemption forms.	

VI. Finance

Item	Action Item	Acceptable Documentation	Submitted
21	School has established fiscal management and oversight policies and an accounting system with internal controls.	<ul style="list-style-type: none"> • By <u>July 1st</u>, Initial Statement as adopted by the Board as well as evidence that the school has contracted with a Certified Public Accounting firm or Accountant to complete an Independent Accountants' Report, per <u>Section 6.4</u> of the Charter Agreement. • Independent Accountants' Report no later than forty-five (45) days of engagement of CPA. • Evidence of employment of or contract with accountant, bookkeeper or other person to handle such duties. • Copy of the school's fiscal policies and procedures • A written statement of assurance that the dollars set aside in the school's escrow account are separate from the operating funds of the school • Each charter school must establish a separate escrow account of no less than thirty-thousand dollars (\$30,000). This reserve must be maintained outside of the school's general operating fund account and cannot be used for operational purposes The school may provide for the full amount at any time during its first three years of operation, or provide for a minimum of ten-thousand dollars (\$10,000) per year for the first three years of its charter term, beginning with the December following the school's first fiscal year of instruction. The Charter School's failure to provide for a minimum of ten-thousand Dollars (\$10,000) by December 31st in each of the first three years of its charter term, beginning with the December following the first fiscal year of instruction, will be deemed a material violation of the Charter Agreement 	
22	A payroll system has been established.	<ul style="list-style-type: none"> • Contract with payroll company or evidence of employment of or contract with persons to handle payroll; and copy of deduction policy. 	

VII. Facilities, Fixtures & Equipment

Item	Action Item	Acceptable Documentation	Submitted
23	School location identified and facility secured and/or in development. An organizer operating a virtual charter school may seek an exemption from this section by obtaining prior written consent from the Executive Director.	<ul style="list-style-type: none"> Copy of lease or deed with the physical address of the facility clearly indicated. 	
24	Evidence of insurance	Certificates of Insurance for all required insurance coverage from an insurance company that is licensed to do business in Indiana or in another state, if applicable, and is rated an A or better by A.M. BEST rating service	
25	A certificate of occupancy (or statement of substantial completion) is on file, as well as any other appropriate certificates of inspection, or permits.	<ul style="list-style-type: none"> Certificate of occupancy or statement of substantial completion. Zoning, land use, and building use permits and/or certification. State construction design release (if applicable). Documentation from Indiana Department of Homeland Security. Documentation from the county or relevant local Health Department. Documentation from the State Fire Marshall or local Building Inspector. If applicable, documentation from the local Fire Department. 	
26	Safety Plan	Submission of School Safety and Security Plan during upcoming school year reporting requirements ("IC") § 20-34-3-23	