



SCHEDULE A: Required Documentation

This Schedule lists the documents to be submitted to CCCOE, the dates they are due, and the frequency at which they are due. When any document is revised it must be submitted to CCCOE within 14 business days of the revision whether they are based on material changes or not. Remember all material changes must be first submitted to and approved by the County Board before they are instituted. Documents which are to be posted on the charter’s website must also be revised to reflect any changes when made.

The Authorizer or Designee may also request documents and information from the charter school by email, phone or other form of communication. Within 10 days of the request the charter must confirm receipt of the request, and establish with CCCOE the due date of submission. Information not submitted to the County Office within the agreed upon timeline will be referred to the Authorizer for further action.

NOTE: The documents highlighted in gold below are fillable forms that are available on the CCCOE Charter Webpage at https://www.ccco.k12.ca.us/cccoe_schools/charter_schools.

ITEM	DESCRIPTION	DUE DATE	Method of Delivery and Access	FREQUENCY			DATE RECEIVED
				Before Start Up & When Changed	Annually & When Changed	Other	
GOVERNANCE AND ORGANIZATIONAL MANAGEMENT							
1.1 Organizational Structure							
CDS code	Confirmation of receipt of CDS code		Email to CCCOE	X			
Organizational Chart	Structure of organization from governing board to classroom teacher, including Charter Management Organization, if applicable.		Posted on the Charter Website and Email to CCCOE	X			

ITEM	DESCRIPTION	DUE DATE	Method of Delivery and Access	FREQUENCY			DATE RECEIVED
				Before Start Up & When Changed	Annually & When Changed	Other	
Non-profit Status	A copy of the signed contract, stating that the charter is a non-profit corporation.		In Petition and Email to CCCOE	X			
All contracts that impact governance	All contracts signed by the Charter or the Charter Management Organization that have an impact on the functioning and governance of the board of directors.		In Petition and Email to CCCOE	X			
School Contact Information	CCCOE form of contact information: school leader name, school phone, school fax, school leader emergency phone, school leader email, school address, and school leader's office hours	August 1 st	Email to CCCOE		X		
School Leadership Information	CCCOE form with a roster of school leadership that includes phone number and email address for: <ul style="list-style-type: none"> ▪ School leader ▪ Assistant leader (Vice Principal, Assistant Principal, etc.) ▪ On-site Coordinators and/or Coaches ▪ Designated Special Education Coordinator ▪ Designated English Learner Coordinator ▪ Designated Section 504 Coordinator ▪ Designated Homeless Coordinator ▪ Designated Foster Youth Coordinator ▪ Office Manager ▪ Operations Manager ▪ Primary Finance/Accounting contact ▪ Primary Human Resources contact ▪ Primary Attendance reporting contact 	August 1 st	Posted on Charter Website and Email to CCCOE		X		
1.2 Board Governance							
Articles of Incorporation	As submitted		In Petition and Email to CCCOE	X			

ITEM	DESCRIPTION	DUE DATE	Method of Delivery and Access	FREQUENCY			DATE RECEIVED
				Before Start Up & When Changed	Annually & When Changed	Other	
Board biographies	Brief summaries of the background and experience of board members		In Petition and Email to CCCOE	X			
Board Roster	Names and email addresses of all board members, with end date for current term of service, officers and committee assignments identified.		In Petition and Email to CCCOE	X			
Bylaws	Current version of the bylaws as approved by the school's governing board		In Petition and Email to CCCOE	X			
501(c)(3) tax-exempt status	Letter from IRS confirming approval of tax-exempt status		In Petition and Email to CCCOE	X			
Board election process	Process used for choosing Board Members. It should be a brief description of the process and be consistent with the charter and its bylaws.		Email to CCCOE	X			
Board Meeting Schedule	Dates, times and locations for all regular meetings of the board for the fiscal year; include all standing committees; identify annual organizational meeting at which board members and officers are elected.	August 1 st	Posted on Charter Website and Email to CCCOE		X		
Board Meeting Agendas	Board and standing committee meeting agendas	At time of required posting (Brown Act)	Posted on Charter Website and Email to CCCOE			To be Posted on Charter Website for Every Meeting	
Agenda Item Attachments	All documents referred to in the agenda or discussed at the meeting.	Within 3 days after the meeting	Posted on Charter Website and Email to CCCOE			To be Posted on Charter Website for Every Meeting	

ITEM	DESCRIPTION	DUE DATE	Method of Delivery and Access	FREQUENCY			DATE RECEIVED
				Before Start Up & When Changed	Annually & When Changed	Other	
Board Meeting Minutes	Approved minutes of board and standing committee meetings	Within 2 business days after approval	Posted on Charter Website and Email to CCCOE			To be Posted on Charter Website for Every Meeting	
1.3 Board Policies							
Complaint and/or Internal Dispute Resolution Policies	Must include the procedures and forms used for Uniform Complaint and Due Process Hearings for parents and staff; may include other forms and systems		In Petition, Posted on Charter Website and Email to CCCOE	X			
Conflict of Interest Policies	Conflict policy compliant with Charter and Fair Political Practices Act		In Petition, Posted on Charter Website and Email to CCCOE	X			
Fiscal Management/ Control Policies	Internal fiscal control policies and procedures meeting GASB, including procedures for receipt and disbursement of funds, reconciliation of accounts, contracting, budget preparation, and protection of assets.		In Petition and Email to CCCOE	X			
Health Practices	Covering student health and wellness practices (including immunizations, medications, screenings, student wellness, and food service).		In Petition and Email to CCCOE	X			
Public Records Act Policy	Procedures to implement the California Public Records Act		In Petition and Email to CCCOE	X			
English Learner Policies	Procedures to ensure compliance with legal requirements, including identification, placement and reclassification; consistent with Charter		In Petition and Email to CCCOE	X			

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				Before Start Up & When Changed	Annually & When Changed	Other	
Rehabilitation Act §504 Polices	Procedures to ensure compliance with legal requirement for 504 plans		In Petition and Email to CCCOE	X			
Special Education Policies	Including procedures compliant with IDEA and requirements of SELPA; consistent with Charter		In Petition and Email to CCCOE	X			
Student Discipline Policies	Policies and procedures for student discipline, including behavior expectations, suspension/expulsion standards, and due process; including procedures for students with disabilities.		In Petition and Email to CCCOE	X			
Student Free Speech Policies	Standards and procedures regarding student free expression, consistent with applicable state and federal law		In Petition and Email to CCCOE	X			
Student Grading/Promotion Policies	Policies and procedures regarding student grading, placement of students by grade, promotion from one grade to the next, and retention in current grade; including samples of parent notifications		In Petition and Email to CCCOE	X			
Student Records Policies	FERPA-compliant student records policy, including information on directories and parental access to records.		In Petition and Email to CCCOE	X			
ADMINISTRATION AND LEADERSHIP							
2.1 Personnel Procedures							
Teaching Staff Master List	CCCOE form that lists current teachers, coaches and other student services personnel with current assignments, certifications, and documentation.	August 1 st	Email to CCCOE		X		
Signed Certification letter	Certifying that the following requirements have been fulfilled: all board trainings, all notices to parents, staff licenses and certifications, background checks, TB screening, Mandated Reporter Training, and safety training.	August 1 st	Email to CCCOE	X	X		
Job Descriptions	Job descriptions for all school leadership positions and teachers listed above (including resource teachers, prep teachers, instructional coaches, etc.)		In Petition and Email to CCCOE	X			

ITEM	DESCRIPTION	DUE DATE	Method of Delivery and Access	FREQUENCY			DATE RECEIVED
				Before Start Up & When Changed	Annually & When Changed	Other	
Employee Contracts	A sample of each type of Employee contract (including collective bargaining agreements)		Email to CCCOE	X			
Evaluation procedures and forms	Performance evaluation procedures and sample forms for all leadership positions and teachers (including resource teachers, prep teachers, instructional coaches, etc.).		In Petition, Posted on Charter Web site and Email to CCCOE	X			
2.2 Facilities Inspection and Documentation Viability							
Building Permits	Evidence of compliance with local building code for educational uses, including building permits and zoning.		Email to CCCOE	X			
Certificate of Occupancy	Valid current Certification of Occupancy for school use.		Email to CCCOE	X			
Facilities Lease Agreement(s)	Lease, rental agreement, facilities use agreement or similar documentation of right to use school facilities.	August 1 st	Email to CCCOE	X	X		
Fire Marshal Inspection	Verification of passage of Fire Marshal inspection of the site.	August 1 st	Email to CCCOE	X	X		
Safety plan	Per Ed. Code Sec. 32281, safety and emergency response plan for specific site/s, covering earthquake, fire, natural disasters, bomb threat and criminal activity lock-down procedures; sample evacuation plans for classrooms; planned rotation of safety drills. Must address child abuse reporting procedures. The School will provide training for staff in responding to emergencies and conduct emergency response drills for its students.	March 1 st	Posted on Charter Website and Email to CCCOE		X		
Proof of Insurance	Certificate of insurance in the amounts required by the MOU [authorizing agency]	August 1 st	Email to CCCOE	X	X		

ITEM	DESCRIPTION	DUE DATE	Method of Delivery and Access	FREQUENCY			DATE RECEIVED
				Before Start Up & When Changed	Annually & When Changed	Other	
Risk Management Plan	Policies and practices to prevent and address reasonably foreseeable risks and incidents occurrences, plus certification that such policies and practices have been instituted		In Petition and Email to CCCOE	X			
Health Department Approval	Health department approval for service of food at school facility		Email to CCCOE	X			
Free and Reduced Price Lunch	Process for provision of free or reduced price nutritionally adequate meals		In Petition and Email to CCCOE	X			
EDUCATIONAL PROGRAM AND STUDENT ENROLLMENT							
3.1 Admissions and Enrollment Procedures							
Admission, Enrollment and Exit Procedures	Description of process for admission and enrollment of students, consistent with Charter, and including dates for receiving applications and conducting lottery; also addressing process for exit (voluntary withdrawal)	December 15 th	Posted on Charter Website and Email to CCCOE	X			
Student Application Form	Current sample of printed, downloadable or on-line application for admission to the school.	December 15 th	Posted on Charter Website and Email to CCCOE	X			
Student Recruitment Plans	Including scheduling meetings, outreach and description of process for targeting the process in attempts to mirror the local districts enrollment.	December 15 th	Email to CCCOE		X		
Enrollment preferences, if any	List of preferences that will be given to students for enrollment priority.	December 15 th	In Petition and Email to CCCOE	X			
Required Documents for Enrollment	List of information and documents required to complete enrollment of admitted students.	December 15 th	Posted on Charter Website and Email to CCCOE	X			

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3.2 Family Involvement and Participation							
Student/Family Handbook	School will annually provide a hardcopy of the parent/student handbook to each family. Materials will be provided to students and families regarding school policies, procedures and expectations; attendance policies, discipline, the right to appeal expulsions with the County Board, parent volunteers, electronics, dress codes, etc.	August 1 st	Posted on Charter Website and Email to CCCOE		X		
Parent Involvement Process	Description of process used to involve parents/guardians in decision-making about the school. Should include an annual schedule of events, how parents were engaged, and how many attended.	August 1 st	In Petition and Email to CCCOE	X	X		
3.3 Academic Program: Curriculum and Instruction							
Academic Calendar	Calendar of academic year showing holidays, recess periods, staff development days, etc.	August 1 st	Posted on Charter Website		X		
WASC Accreditation	Documentation of current status of WASC accreditation (<i>High Schools Only</i>).		Email to CCCOE			When Granted	
A-G Course Approval	Verification of UC/CSU approval of A-G courses (<i>High Schools Only</i>).		Email to CCCOE			When Granted	
Bell Schedule for Site-based Programs	Current schedule of class periods on daily and weekly basis, with arrival and dismissal times for regular and early release days.	August 1 st	Posted on Charter Website	X	X		
Curriculum	Overview for all subjects in grades to be served.	August 1 st	In Petition and Email to CCCOE	X			
Instructional Materials List	List of Instructional Materials to be used (including materials for English language learners).	August 1 st	Email to CCCOE	X			
Instructional Minutes	Amount of time in which students are participating in an approved course, curriculum, or educationally related activity under the direction of a teacher.	August 1 st	Email to CCCOE	X			
Submission of Board Approved LCAP	Annual Local Control and Accountability Plan (LCAP) using state template (to be submitted with budget)	Last Week in June	Posted on Charter Website and		X		

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				Before Start Up & When Changed	Annually & When Changed	Other	
			Email to CCCOE				
3.4 English Learner (EL) Support							
Evaluation of EL progress after reclassification.	Description of regular, on-going policies to evaluate EL student progress for at least three years after each student has been reclassified as English proficient.		In Petition and Email to CCCOE	X			
EL access to standards and grade level instruction	Description of how English learners will have access to standards-aligned and grade level appropriate instruction in mathematics and English language arts.		In Petition and Email to CCCOE	X			
3.5 Special Education							
SELPA Verification	Letter of verification of good standing in a Special Education Local Planning Area (SELPA).	August 1 st	Email to CCCOE		X		
Special Education Services	Signed contract with special education and 504 service providers; or identification of individuals responsible for providing service.		In Petition and Email to CCCOE	X			
3.6 Independent Study							
Independent Study Program Verification	Documentation verifying compliance with independent study requirements as required by MOU (<i>if applicable</i>).		In Petition and Email to CCCOE	X			
FINANCIAL MANAGEMENT AND REPORTING							
4.1 Fiscal Management							
Funding	Verification of Funding.		In Petition and Email to CCCOE	X			
Start-Up Grant Funding	Public Charter School Grant Program application and subsequent correspondence about status.		Email to CCCOE			When Applying for Funding	
Accounting Services	Signed contract with back-office or financial services provider; or identification of individual/s responsible for providing service.		Email to CCCOE	X			

ITEM	DESCRIPTION	DUE DATE	Method of Delivery and Access	FREQUENCY			DATE RECEIVED
				Before Start Up & When Changed	Annually & When Changed	Other	
Verification of use of a Student Information System	Contract or other verification of the use of a student information/attendance tracking system.		Email to CCCOE	X			
Process for Maintaining a Reserve	Consistent with <i>CCR, Title 5, Section 15443</i> , the School is expected to maintain prudent reserves at least equivalent to those required of a school district of similar size: <u>School ADA</u> <u>Expected Reserve</u> 0–300 greater of 5%* or \$50,000 301–1,000 greater of 4%* or \$50,000 1,001–30,000 3%* Percentages are applied to total expenditures, transfers out and other uses, except as provided for in <i>EC 33128</i> .		In Petition and Email to CCCOE	X			
Bank Information for Fund Transfers	Completed CCCOE forms for transfer of funds from CCCOE to charter school.		Email to CCCOE	X			
Independent Auditor Selection	Notification of independent auditor selected for annual audit.	April 1 st	Email to CCCOE		X		
Payroll	Contract or other verification of payroll services provider.		Email to CCCOE	X			
Contract for STRS/PERS Reporting	Contract with CCCOE for STRS and/or PERS reporting, if applicable	Last Week of June	Email to CCCOE		X		
Oversight Fees	Payment of invoice for oversight fee.	Last Week of June	Email to CCCOE		X		
4.2 Student Attendance Reporting							
PENSEC report	Attendance report for new or significantly expanding charter .	1 week before CDE deadline (July 31)	Email to CCCOE			When Sending to CDE	

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First 20-Day Attendance report	First 20 day attendance reports for newly operational or expanding charters have been filed (due December)	1 week before CDE deadline (October)	Email to CCCOE			When New or Expanding	
First Principal Apportionment (P-1)	July-Dec (P-1) Attendance /supporting documents are filed (due January 15)	1 week before CDE deadline (January 15)	Email to CCCOE		X		
Second Principal Apportionment (P-2)	July-April 15 (P-2) Attendance /supporting documents are filed (due May 1)	1 week before deadline (April)	Email to CCCOE		X		
Annual Apportionment (P-Annual)	Attendance report for annual attendance accounting period, in CDE format.	1 week before CDE deadline (July 15)	Email to CCCOE		X		
4.3 Revenue and Expenditure Reporting							
Approved Budget	Final budget for first fiscal year of operation; completed and approved (includes MYP, Cash Flow, LCAP and special education).	Last week of June	Email to CCCOE		X		
First Interim Report	Report on first period revenues and expenditures; completed using CCCOE template, with additional information as requested (i.e., special education).	1 week before CDE deadline (December 15)	Email to CCCOE		X		
Second Interim Report	Report on second period revenues and expenditures; completed using CCCOE template, with additional information as requested (i.e., special education).	1 week before CDE deadline (March 15)	Email to CCCOE		X		
4.4 Annual Audit							
Unaudited Actuals	Report on prior year revenues and expenditures; completed using CDE template.	1 week before CDE deadline (September 15)	Email to CCCOE		X		

ITEM	DESCRIPTION	DUE DATE	Method of Delivery and Access	FREQUENCY			DATE RECEIVED
				Before Start Up & When Changed	Annually & When Changed	Other	
Annual Audit Report	Annual report from the charter's independent financial audit.	December 15 th for prior fiscal year	Email to CCCOE		X		
FULFILLING CHARTER TERMS							
5.1 Material Amendments							
Material Amendment Approvals	Approval of any material amendments/revisions to the charter by the governing board and by the County Board.		Email to CCCOE			Before Every Material Change	
5.2 Adherence to the Charter							
Required Visitor Policy Adopted by Charter School	Described required visitor policies adopted by the Charter School during unannounced visits.		In Petition, Posted on the Charter Website, and Email to CCCOE	X			
Identification of Point of Contact for Closure Activities	Name, phone, email, fax and postal address for primary contact in event of school closure (If updated from previous year).		In Petition and Email to CCCOE	X			
School Closure Checklist	Plan for school closure, consistent with charter provisions (if updated from previous year). See School Closure Procedures Checklist for activities, which must be completed in the event of closures.		Email to CCCOE	X			

SCHEDULE A: Required **CERTIFICATIONS**

ITEM	DESCRIPTION	DUE DATE	INITIALS
Board Trainings	Verification that all required board trainings (Brown Act and Fair Political Practices Act training for board and leadership) have been conducted.	August 1 st	
Notices to Parents/Guardians	Verification that all required notices have been provided to Parents/Guardians, including those required under applicable State and Federal Law (examples: Title I, English learners, special education, etc.).	August 1 st	
Required and appropriate licenses and certifications	Verification that all of the school's faculty and staff are credentialed, licensed, or otherwise qualified for the positions for which they have been employed in accordance with any applicable requirements of law, the Charter, and the policies and directives of the governing board.	Prior to opening and August 1 st	
Clearances & Criminal Background Checks	Verification that all employees and volunteers at school site have been subject to criminal background checks (FBI and DOJ) and any other clearances necessary for the positions for which they have been employed.	Prior to opening and August 1 st	
TB Screening	Proof of immunization and Tuberculosis screening. Verification that records are stored.	Prior to opening and August 1 st	
Mandated Reporter Training	Verification that the annual training in child abuse detection and mandated reporting obligations under the Child Abuse and Neglect Reporting Act have been completed by all employees per Ed. Code Sec. 44691.	Prior to opening and August 1 st	
Safety Training	Verification that all employees have been trained in health, safety and emergency procedures.	Prior to opening and August 1 st	

I certify that the above Certifications are complete for the _____ school year.

Signature of Completing Administrator

Date