

**City of Indianapolis
Mayor's Office
Pre-Opening Visit Checklist
2008**

This checklist will be used by the Mayor's office to determine readiness to begin operation as a charter school. The checklist items will be reviewed in four phases by representatives of the Mayor's office: May 1-15, June 1-15, July 15-31, and August 7-21. This will allow the Mayor's office the opportunity to monitor school readiness for opening and will provide schools time to address any identified weaknesses and establish contingency plans as needed before school begins.

School Name: _____

Designated Contact Person: _____

Mayor's Office Representative: _____

Areas addressed in this checklist:

- I. Governance and Management
- II. Staffing
- III. Curriculum and Instruction
- IV. Students and Parents
- V. Operations
- VI. Facilities, Furnishings and Equipment
- VII. Accountability

Explanation of table:

Review Period: The pre-opening review will take place in four phases. Specific checklist items will be reviewed during specified review periods as appropriate and noted in the guide below. Additional reviews or follow-up may take place as needed on a case by case basis.

Date Due: These are the dates that specific items must be completed per the Charter agreement. These items should be inserted into the Compliance Binder at the appropriate times and will be reviewed during the applicable pre-opening review period. These items are listed in the pre-opening checklist as they must be satisfactorily completed prior to school opening.

Area of Review: Items required in Charter Agreement (including Prior Actions) are listed in bold.

Documentation: Where appropriate, the school may determine the suitable type of documentation to provide. In most cases, however, the documentation listed is that which the Mayor's office expects to review.

Status and Follow-up Actions: At the time of review, the school and Mayor's office together will determine any mutually agreed upon follow-up that must occur if the status of a particular item is noted as anything other than "complete."

Completion verified: Once an items is verified as satisfactorily complete, the Mayor's office will note it as such.

I. Governance and Management

Review period	Actual date due	Area of review	Documentation	Status and follow-up actions	Completion verified
May 1-15	March 1	Reporting Calendar	<ul style="list-style-type: none"> Schedule for all reports to submit to Mayor's office per Charter agreement (and Accountability Handbook) – Charter sections 4.4, 7, 17.1, 17.3, 17.4, 17.5, 17.6, 17.7, and all Prior Actions 		
		Permanent head(s) of school named and providing leadership for the school, and other key leadership roles in the school have been filled	<ul style="list-style-type: none"> Organizational chart 		
		Permanent head(s) of school named and providing leadership for the school, and other key leadership roles in the school have been filled	<ul style="list-style-type: none"> Contract(s), including position descriptions 		
		Board of Directors established and setting policy direction for the school	<ul style="list-style-type: none"> Meeting minutes from at least one board meeting within the last 60 days 		
June 1-15	June 1	School has adopted proper internal financial and accounting controls	<ul style="list-style-type: none"> Initial statement prepared by an independent, certified public accountant certifying Organizer has adopted proper internal financial and accounting controls, and detailing a plan to address any deficiencies noted in the accountant's statement. 		
	June 1	Financial Plan	<ul style="list-style-type: none"> 5-year detailed budget that also identifies start-up costs 		

June 1-15	June 1	Financial Plan	<ul style="list-style-type: none"> 5-year cash flow plan identifying the sources of funds available to pay start-up costs and costs of operations prior to receipt of state and local tuition support 		
	Within 90 days after charter signing (i.e., by June 2)	Criminal background checks completed for all current board members (IC 20-26-5-10)	<ul style="list-style-type: none"> Background check authorizations and results are on file (Note: checks must be completed 14 days prior to the approval of any new board members.) 		
July 15-31		Determination of tax-exempt status from the IRS has been received (Charter Sec 3.1)	<ul style="list-style-type: none"> Letter from IRS documenting tax-exempt status and number 		

Additional Pre-Opening Visit Notes:

II. Staffing

Review period	Actual date due	Area of review	Documentation	Status and follow-up actions	Completion verified
May 1-15		Documentation of clear lines of authority and responsibility	<ul style="list-style-type: none"> Organizational chart 		
		Documentation of clear lines of authority and responsibility	<ul style="list-style-type: none"> Position descriptions 		
		Number of teachers is adequate and their assignments match the staffing plan	<ul style="list-style-type: none"> Staffing plan 		
		Number of teachers is adequate and their assignments match the staffing plan	<ul style="list-style-type: none"> Teacher roster 		
		All staff positions have been filled and employment applications and contracts are on file for each staff member	<ul style="list-style-type: none"> Signed contracts with position descriptions 		
		Teaching staff hold teaching licenses in Indiana or are in the process of enrolling in transition to teaching programs (IC 20-28-4)	<ul style="list-style-type: none"> Valid Indiana teacher's license listing certification areas in teaching staff files – school must provide one of the following items 1. copy of valid license; 2. letter from licensing advisor indicating that teacher is eligible to apply for license and has done so; 3. for out of state applicant, 1 year reciprocal license or letter of evaluation from IPSB which states requirements for IN license; OR 		

May 1-15		Teaching staff hold teaching licenses in Indiana or are in the process of enrolling in transition to teaching programs (IC 20-28-4)	<ul style="list-style-type: none"> Evidence of enrollment in transition to teaching program in teaching staff files (e.g., teacher contract may list obligation to complete transition to teaching program as condition of employment; letters of inquiry to universities demonstrating that teacher is investigating various transition to teaching programs) 		
		Paraprofessionals meet requirements under No Child Left Behind	<ul style="list-style-type: none"> Evidence in staff files that paraprofessionals whose duties include instructional support have one of the following: 2 years of higher education; an associate's (or higher) degree; or a passing score on a state-approved assessment 		
May 1-15		Special Education Teaching Staff (Teacher of Record)	<ul style="list-style-type: none"> Signed contracts for special education teachers (each school must have a teacher of record ON STAFF) Evidence that special education teachers hold valid certification in the state of Indiana 		
June 1-15		Initial background checks for all staff and volunteers have been completed	<ul style="list-style-type: none"> Background check authorizations and results are on file for all staff members and volunteers who have contact with children (including parent volunteers) 		
		TRF and PERF (retirement benefits) are in place for appropriate staff	<ul style="list-style-type: none"> Evidence that arrangements have been made for contributing to public retirement funds 		

Additional Pre-Opening Visit Notes:

III. Curriculum and Instruction

Review period	Actual date due	Area of review	Documentation	Status and follow-up actions	Completion verified
June 1 – 15	May 15	Comprehensive Special Education Plan	<ul style="list-style-type: none"> • Copy of comprehensive plan that complies with applicable law and has received approval from IDOE 		
	May 15	Comprehensive Special Education Plan	<ul style="list-style-type: none"> • Evidence that staff are on board to provide special needs services (all schools must have a special education teacher of record ON STAFF), or evidence that arrangements have been made for contracted services 		
	May 15	Comprehensive Special Education Plan	<ul style="list-style-type: none"> • Evidence that the school administrators have met with the Virtual Special Education Co-op representatives and are aware of the requirements the schools must meet for special education. 		
	May 15	Comprehensive Special Education Plan	<ul style="list-style-type: none"> • Evidence of the action plan the administrators developed with representatives of the Virtual Special Education Co-op to ensure that special education students will be served appropriately at the school. 		
	May 15	Comprehensive Special Education Plan	<ul style="list-style-type: none"> • Evidence that intake process identifies special needs students (e.g., application, parent/student survey or questionnaire) 		

June 1 – 15	June 15	Curriculum	<ul style="list-style-type: none"> Detailed, specific summary of curriculum 		
		Instructional materials and supplies	<ul style="list-style-type: none"> Evidence that materials and supplies are in stock or on order and will be delivered in time for school opening 		
July 15 – 31	2 mos. before first day of school	School calendar (Charter Section 17.7)	<ul style="list-style-type: none"> Comprehensive calendar that includes, for example, first and last days of school, days school closed for vacation or staff development, school make-up days due to inclement weather 		
July 15 – 31		Class schedules	<ul style="list-style-type: none"> Schedule of classes for each grade and/or subject area 		

Additional Pre-Opening Visit Notes:

IV. Students and Parents

Review period	Actual date due	Area of review	Documentation	Status and follow-up actions	Completion verified
May 1 - 15	2 mos. before lottery	Documentation of recruiting and admission process for the upcoming school year (Charter Section 17.7) 2 months before enrollment lottery	<ul style="list-style-type: none"> Documentation of recruitment strategies, application procedures, and lottery and waitlist process 		
June 1- 15		Procedures are in place for collecting students' prior school cumulative and special education records and for securely storing student academic, attendance, and discipline records	<ul style="list-style-type: none"> Evidence that procedures are in place for efficiently collecting students' academic and special education records from sending schools 		
June 1- 15		Procedures are in place for collecting students' prior school cumulative and special education records and for securely storing student academic, attendance, and discipline records	<ul style="list-style-type: none"> Evidence that specific procedures are in place for asking former school for any possible special education records for all enrolled students – school must demonstrate it is taking responsibility for ensuring special education records are obtained in a timely fashion (e.g., records request form signed by parents will be sent to both the school and the district office specifically requesting both cumulative and special education records; the records will be requested far in advance of the start of school; and the school has additional follow-up steps in place to ensure <u>all</u> records are received in a timely manner) 		

June 1-15		Procedures are in place for collecting students' prior school cumulative and special education records and for securely storing student academic, attendance, and discipline records	<ul style="list-style-type: none"> Evidence that procedures are in place for securely storing student academic, attendance, and discipline records. 		
July 15 - 31	2 mos. before first day of school	Projected student enrollment (Charter Section 17.7)	<ul style="list-style-type: none"> Student roster with assigned grade levels, school corporations of residence 		
		A student roster is in place	<ul style="list-style-type: none"> Student roster with assigned Student Identification Numbers (per IDOE requirements) 		
		Electronic system for maintaining student records has been implemented (Charter Section 6.5)	<ul style="list-style-type: none"> Evidence that an electronic system is in place (information should be easily aggregated and disaggregated by race, gender, school corporation of residence, special education, free/reduced lunch, date of enrollment, date of withdrawal, previous schooling, etc.) 		
August 7 - 21		Student policies (including suspension and expulsion policies) have been established and are available to students and parents in written form	<ul style="list-style-type: none"> Copy of student policies (including suspension and expulsion policies) has been distributed to students and parents in written form. 		

Additional Pre-Opening Visit Notes:

V. Operations

Review period	Actual date due	Area of review	Documentation	Status and follow-up actions	Completion verified
July 15-31	July 1	Transportation	<ul style="list-style-type: none"> • Specific, detailed plan • Arrangements have been made for plan implementation (e.g., contract with bus company) 		
	July 15	School Safety and Emergency Preparedness	<ul style="list-style-type: none"> • Specific, detailed plan • Includes plans for preparing for/responding to emergencies • Complies with applicable law • Includes monthly fire drill and 2 tornado (shelter) drills per semester 		
		Arrangements have been made for food services	<ul style="list-style-type: none"> • Food service contract • Licensing from Marion County Health Department 		
August 7-21		Provisions have been made for health services, screenings, and immunization records	<ul style="list-style-type: none"> • Evidence that health services are available (school nurse on staff or contract, contract with local health facility, etc; note: if school hires/contracts with an LPN, must be supervised by an RN and work must not go beyond the scope established by the LPN and RN) 		
August 7-21		Provisions have been made for health services, screenings, and immunization records	<ul style="list-style-type: none"> • Evidence that procedures are in place for administering student medications (e.g., specific staff members identified and trained to administer medication) 		

August 7-21		Provisions have been made for health services, screenings, and immunization records	<ul style="list-style-type: none"> Evidence that procedures are in place to document student immunizations 		
August 7-21		Provisions have been made for health services, screenings, and immunization records	<ul style="list-style-type: none"> Evidence that procedures are in place to screen and document student hearing, vision, and posture 		

Additional Pre-Opening Visit Notes:

VI. Facilities, Furnishings and Equipment

Review period	Actual date due	Area of review	Documentation	Status and follow-up actions	Completion verified
May 1-15	Latest by March 15, or 2 weeks before acquire physical plant	Insurance coverage for Commercial General liability and Umbrella liability	<ul style="list-style-type: none"> • Certificates of insurance for Commercial General liability and Umbrella liability (Coverages take effect no later than effective date of acquisition of physical plant) 		
	March 30	Organizer has acquired, through purchase, lease or otherwise, the location and facility for the school	<ul style="list-style-type: none"> • Purchase or lease agreement 		
	April 1	Insurance coverage for Director's and Officers' liability, Educators' Legal liability and Employment Practices liability, Automobile liability, Sexual Abuse liability, and Workers Compensation liability	<ul style="list-style-type: none"> • Certificates of insurance for Director's and Officers' liability, Educators' Legal liability and Employment Practices liability, Automobile liability, Sexual Abuse liability, and Workers Compensation liability (Coverages take effect by April 3) • Verification that insurance company is licensed to do business in Indiana and has at least an A- rating from A.M. Best 		
June 1-15	June 1	The necessary steps are being taken to ensure all inspections are completed in a timely manner prior to opening	<ul style="list-style-type: none"> • Evidence the school is working with: State Department of Health, Marion County Health Department, State Fire Marshall, Indianapolis Fire Department and City Building Inspector 		

	June 1	The necessary steps are being taken to ensure all inspections are completed in a timely manner prior to opening	<ul style="list-style-type: none"> Evidence that school is on track for all final inspections to be completed by July 15 		
	June 1	The necessary steps are being taken to ensure all inspections are completed in a timely manner prior to opening	<ul style="list-style-type: none"> Evidence school is taking the necessary steps to comply with Americans with Disabilities Act requirements 		
	June 1	All required zoning permits have been obtained	<ul style="list-style-type: none"> Permits and certification for ZONING from the City of Indianapolis Department of Metropolitan Development and Department of Public Works deeming facility suitable for a school 		
	June 1	All required land use permits have been obtained	<ul style="list-style-type: none"> Permits and certification for LAND USE from the City of Indianapolis Department of Metropolitan Development and Department of Public Works deeming facility suitable for a school 		
	June 1	All required building related permits have been obtained	<ul style="list-style-type: none"> Permits and certification related to BUILDING USE from the City of Indianapolis Department of Metropolitan Development and Department of Public Works deeming facility suitable for a school 		
July 15-31	July 15	All required inspections have been completed successfully	<ul style="list-style-type: none"> Documentation from the State Department of Health 		
	July 15	All required inspections have been completed successfully	<ul style="list-style-type: none"> Documentation from the Marion County Health Department 		

	July 15	All required inspections have been completed successfully	<ul style="list-style-type: none"> • Documentation from the State Fire Marshall 		
	July 15	All required inspections have been completed successfully	<ul style="list-style-type: none"> • Documentation from Indianapolis Fire Department 		
	July 15	All required inspections have been completed successfully	<ul style="list-style-type: none"> • Documentation City Building Inspector 		
August 7-21	30 days before first day of school	Mayor's office approval of physical plant	<ul style="list-style-type: none"> • Letter of approval 		
		Space is accessible, clean, and well-lit	<ul style="list-style-type: none"> • Accessible, clean, well-lit space 		

Additional Pre-Opening Visit Notes:

VI. Accountability

Review period	Actual date due	Area of review	Documentation	Status and follow-up actions	Completion verified by Mayor's office
August 7-21		ISTEP + testing materials	<ul style="list-style-type: none"> Evidence that the appropriate ISTEP + testing materials are in stock or on order and will be delivered in time for test administration (mid-September) 		
		Non-ISTEP fall and spring testing	<ul style="list-style-type: none"> Evidence that the appropriate arrangements have been made (e.g., materials ordered) in order for schools to administer non-ISTEP fall and spring testing 		
		Collection of baseline data on student performance and other school indicators	<ul style="list-style-type: none"> Plan for establishing baseline data on student performance and other school indicators 		
		Strategy for measuring and reporting student level data consistent with state and federal requirements	<ul style="list-style-type: none"> Plan and/or system for measuring student performance Plan and/or system for reporting data consistent with state and federal requirements 		

Additional Pre-Opening Visit Notes: