

## SECTION V: CHECKLIST

**Applicant Instructions:** In the second column, identify the location of the required item in the application. This could include page number in application or attachment. Several items are not applicable to start-up schools; you will be required to provide them before the school can open. Timelines for these items will be outlined in the charter school contract.

Required Item Description	Location(s) in application	Present*
One page summary description of the charter school including: mission/vision, board chair, school leader, location, and educational program description. Also provide contact information for application team, including name, email, and phone number.	Page 2	
Mission and vision of the charter school	Pages 2-3	
Name of "person" applying to operate the charter school	Page 2	
Articles of Incorporation	Attachment B	
By-Laws	Attachment B	
Tax determination letter	Attachment B	
Evidence of CMO non-profit status, if applicable	N/A	
Board member resumes	Attachment A	
Board resolution adopting the organizational handbooks and manuals	Attachment D	
Personnel Manual (includes qualifications to be met by persons employed in the school; policies the school will follow in conducting background checks, staff recruitment and retention, and procedures for ensuring instructional staff are appropriately licensed)	Attachment D	
Operations Manual	N/A	
Parent Handbook	Attachment D	
Financial Policies and Procedures Manual	Attachment D	
IDEA Policies and Procedures Manual	Attachment D	
Evidence of conflict of interest policy	Attachment D	
Evidence of internal dispute resolution policies	Pages 15-23 Employee Handbook Attachment D	
Evidence of how parents will be involved in school governance	Page 8	
Organizational Chart of management and staff	Attachment C	
Educational leader resume	Attachment E	

Business manager resume	Attachment E	
Describes the organizational structure and responsibilities of the management and staff.	Attachment C	
Describes the school's fiscal management procedures.	Pages 9-10	
<p>Identify the following items in the Financial Policies and Procedures Manual</p> <ul style="list-style-type: none"> <li>• Annual budgeting and budget reporting</li> <li>• Cash flow budgeting and reporting</li> <li>• GAAP and their application for this institution</li> <li>• Internal controls over major financial processes including cash receipts and disbursements, investments, donation/fundraising, facilities/equipment, procurement-accounts payable, billing-account receivable, payroll, travel expense reimbursement, insurance risk management, grants accounting and reporting, enrollment controls, general ledger-budgetary and accounting controls</li> <li>• City of Milwaukee Charter School financial reporting requirements and procedures developed to comply with these requirements</li> <li>• Financial reporting to the Board of Directors</li> <li>• Accounting and financial management qualifications, including professional development requirements for affected staff.</li> </ul>	<p>Attachment D – page 11 Attachment D – page 3-4</p> <p>Attachment D – page 3</p> <p>Attachment D – pages 3-12</p> <p>Section 1 – page 10</p> <p>Attachment D – page 11</p> <p>Section 1 – pages 9-10</p>	(7 items)
Long range business plan	Attachment F	
Detailed budget with key assumptions with two alternate budgets based on 15% below and 30% below project enrollment levels	Attachment H	
Assurance that school's budget revenue and expenditure accounts directly reconcile to the accounting system line item or objects of expenditure accounts	Pages 9-10	
Annual cash budget showing monthly receipts, disbursements and beginning and end of month cash balances with key assumptions	Attachment I	

Budget includes 2% fee for authorizer	Attachment I	
Position listing of all part- and full-time staff	N/A	
Sources and uses of funds	Attachments H & I	
Basis for revenue and expense estimates	Page 10	
Contingency plan for revenue shortfalls	Page 10	
Number of expected charter school students	Page 14	
Monthly cash flow projections for first year of operation as a charter school	Attachment I	
School Budget for the current school year, if applicable	N/A	
Explanation of differences between current school year budget and proposed charter school budget	N/A	
Facility description	N/A	
Proof of ownership or tenant status	N/A	
Building Inspection letter affirming code compliance	N/A	
Occupancy permit	N/A	
Plans to expand or move	N/A	
Certificate of insurance with adequate coverages	N/A	
Letter from insurance provider	Attachment Q	
Evidence that City shall be afforded thirty (30) day written notice of cancellation, non-renewal, or material change by any of the Charter School insurers.	Attachment Q	
Independent Audit engagement letter for first fiscal year	Attachment R	
Auditor report on school's long range business plan and first year budget	Attachment S	
Auditor report on planned, documented internal controls policies and procedures	Attachment S	
Academic goals are present	Page 14	
Curriculum	Pages 14-18	
Method of instruction	Pages 14-18	
Description of specific student assessment measures	Pages 18-20	
Explanation of how school's accountability system incorporate CSRC assessments	Page 18	
Identification of staff person and board rep. or committee reporting to CSRC	Page 5	
Student Information Management Software ID	N/A	
Existing student achievement data, if applicable	N/A	
Other accountability measures	Pages 19-20	

Listing of instructional staff	N/A	
Description for ensuring all instructional staff are licensed	Page 20	
Assurance that identified staff are licensed; plans for those who need emergency certification	Page 20	
Admission Procedures	Page 21	
Description of lottery process for over-enrollment	Pages 21-22	
Description to achieve racial and ethnic balance reflective of the school district	Page 21	
Certification that the school will accept at-risk students	Pages 2-3, Pages 11-14	
Description of admission procedures for students with IEPs.	Page 23	
Description of disciplinary procedures	Page 22	
For existing schools, a summary of disciplinary actions taken during the previous school year	N/A	
Evidence of relationship with other agencies to provide services	Attachment W	
Curriculum adaptations	Pages 14-17	
Proposed staffing adequate to meet obligations under IDEA	N/A	
Data on students with special needs for existing schools	N/A	
Certification signed and dated	Section III	
<b>FOR applicants currently operating a school</b>		<b>YES/NO*</b>
The applicant has created a new organization to operate the charter school		no
The applicant has communicated to parents that students will need to enroll in the charter school		N/A
<b>FOR applicants currently operating a sectarian school</b>		<b>YES/NO*</b>
Application describes a program which is nonsectarian in its practices, programs, admission policies, employment practices and all other operations		N/A
Website communicates nonsectarian nature of school		N/A
Name of school communicates nonsectarian nature of school		N/A

\*To be completed by technical reviewer