



## CHARTER SCHOOL CLOSURE CHECKLIST

(Revised 8/2021)

**IMPORTANT NOTE:** This checklist is not exhaustive. The charter school should work with its authorizer to ensure all applicable and appropriate closure procedures are completed in a timely and thorough manner. Authorizers may also require a separate closure document to be completed by the charter school.

### I. NOTIFICATIONS

	ACTION ITEM	DATE COMPLETED OR N/A
1	If not already completed, notify the charter school's authorizer or the charter school's governing board, as applicable, of the closure decision.	
2	Send notification of closure letter to parents and staff. The letter should include: -Reason for closure decision; -Timeline for closure transition; -Contact person to whom questions should be directed; -Plan for assisting with student placement; and -Any other pertinent information.	
3	Send official notification of closure to the Department of Public Instruction. The documentation submitted should be a resolution or board meeting minutes from the governing board of the charter school or the authorizing entity that clearly approves the school's closure and indicates the effective date of the closure. This documentation should also note whether the school will remain a school without charter status or will close completely. The documentation should be emailed to: <a href="mailto:charterschools@dpi.wi.gov">charterschools@dpi.wi.gov</a> .	
4	DPI Charter Schools staff will send an official letter regarding the school's closure to the school's LEA and the school. Forward a written response to the letter as outlined by July 30 or within 30 days of the last day of student instruction, whichever is earlier.	

5	Hold a closure meeting with staff to explain final timeline and expectations.	
6	Hold a closure meeting with all parents to explain the final timeline and records transfer process, answer questions, and offer assistance for student placement. Consider developing an FAQ document to distribute to parents at the meeting. Also, consider distributing a list of educational options to parents at the meeting. For a list of options, see DPI's website at <a href="http://dpi.wi.gov/ed-options">http://dpi.wi.gov/ed-options</a> .	
7	Contact local school district authorities, private schools, charters schools, and other pertinent groups regarding a school enrollment fair.	
8	Host a school enrollment fair for parents and students to ensure placement of all students in high-quality schools.	
9	Notify appropriate agencies, vendors, creditors, and partners of school's closure.	
10	Notify appropriate teams at the DPI of the school's closure and work with DPI staff to ensure the proper close-out of any federal grants or federal programs: - Customer Services Team, 800-507-5744 ( <i>Data &amp; Reporting</i> ) - Title I & School Support, 608-267-3721 - Special Education, 608-266-1781 - Food & Nutrition, 608-266-3509 - Assessment, 608-267-1072	
11	If the school has WI Non-Stock Corporation status or 501c3 status, notify the appropriate state and federal agencies of the organization's dissolution.	

## II. FINANCIAL

	ACTION ITEM	DATE COMPLETED OR N/A
12	Develop a closing operating budget and closure policy for expenditures.	
13	Compile list of all vendors and creditors and ensure final financial obligations are met and contracts satisfied.	
14	Ensure final payment of all payroll and satisfaction of all vendor contracts and payments to creditors are made.	
15	Maintain existing insurance coverage for facility, vehicles, and assets until the disposal of all assets, termination of lease, transfer or sale of real estate, and transfer or sale of vehicles.	
16	Meet with Human Resources and Benefits personnel to ensure staff benefits and contracts are fulfilled. Communicate any pertinent information regarding changes in coverage to staff.	

17	Ensure that grant funds and other federal funds are only used for allowable expenses. The school may not reallocate resources from federal grants and other federal programs to pay expenses unrelated to the program or grant.	
18	Conduct a final inventory of all assets, equipment, supplies, etc. Follow disposition instructions of those items purchased with federal funds as outlined in DPI's closure letter. Work with the governance board and authorizer on the proper disposal of assets, equipment, and other items.	

### III. RECORDS

	ACTION ITEM	DATE COMPLETED OR N/A
19	Ensure all student records, staff records, and financial records are organized and secured until records transfer is needed.	
20	Ensure all personnel, financial, and organizational records are transferred and stored at a secure location upon closure. The governance board should follow its applicable records policy and work with the authorizer to ensure appropriate actions are taken.	
21	Ensure that all student records are transferred to the appropriate school/school district upon closure, as required by law. Maintain a master list of all student names that identifies the date of transfer and where the records were sent.	
22	Ensure parents receive copies of all final report cards and are notified of where their student's records will be transferred.	

### IV. FINAL REPORTING

	ACTION ITEM	DATE COMPLETED OR N/A
23	Complete all final reporting for coursework completion, enrollment, etc. Work with the DPI Customer Services Team to ensure all applicable reports are submitted appropriately.	
24	Plan appropriately to ensure all required audits, financial reports, and other financial procedures are completed and submitted to the appropriate office upon closure.	
25	Ensure all final claims for federal grants and programs are filed within the required timeframe.	