

## Public Education Commission--Charter School Closure Procedure

*Dates assume nonrenewal; dates will be adjusted for revocation or surrender.*

	Action Item	Responsibility for Completing Action	Due Date	Status
1	<b>Letter from PEC</b>	PEC Chair	Within 14- calendar days of PEC decision (completed by February 1)	
	<b>Letter to Parents</b> -Explain PEC closure decision and appeals process  <b>Convene Parent Meeting</b> -Explain transfer of student records. -Explain alternate school choice.	School Administrator	Within the 1 <sup>st</sup> 10- school days after receipt of Letter from PEC or as soon as reasonably practical (accommodating for school holidays (complete by February 1)	
	<b>Letter to Staff</b>	School Administrator	Within the 1 <sup>st</sup> 10- school days after receipt of Letter from PEC or as soon as reasonably practical (accommodating for school holidays (complete by February 1)	
2	<b>Establish Transition Team and Assign Roles</b>  Team to include but not limited to: <ul style="list-style-type: none"> <li>• PEC Chair</li> <li>• CSD Director</li> <li>• PED Budget Analyst</li> <li>• School Administrator</li> <li>• School Business Manager</li> <li>• Governing Council Member</li> <li>• Parent</li> </ul>	PEC Chair CSD Director School Administrator	February 1  The following team members' responsibility continues beyond the closure of the school. <ul style="list-style-type: none"> <li>• PEC Chair</li> <li>• CSD Director</li> <li>• PED Budget Analyst</li> <li>• School Business Manager</li> <li>• Governing Council Member</li> </ul>	
3	<b>Notice of Closure to NMPED Divisions &amp; Bureaus, including Grant Managers</b>	CSD Director	February 15	
4	<b>Notice of Closure to PSCOC, PSFA, and NMPSIA</b>	CSD Director	February 15	
5	<b>Contract with Closure Vendor</b> <ul style="list-style-type: none"> <li>• Coordinate closure procedure on behalf of NMPED and PEC (to include external licensed business official NOT currently a vendor for the school</li> </ul>	PEC Chair to oversee selection and receive bimonthly reports, CSD Director to manage closure vendor	February 15	

	and licensed school administrator.			
6	<b>Lease Terms</b> <ul style="list-style-type: none"> <li>• Copy of lease</li> <li>• Identify final/termination date of lease</li> <li>• notify landlord</li> </ul> <i>*Provide to CSD Director; Deputy Secretary of Budget &amp; Finance; Director of School Budget &amp; Finance Analysis Bureau</i>	School Business Manager	February 15	
7	<b>Financial Management Services System</b> Provide access to NMPED staff/contractor to financial system	School Business Manager	February 15	
8	<b>Student Information System</b> Provide access to NMPED staff/contractor to student information system (SIS), ensure FERPA compliance	School Administrator	February 15	
9	<b>Convene Staff Meeting</b> <ul style="list-style-type: none"> <li>• Communicate commitment to continuing coherent school operations through closure transition</li> <li>• Provide employment verifications to staff</li> <li>• Ensure all staff files are organized, up to date, and maintained in a secure location</li> <li>• Digitize employment verifications</li> </ul>	School Administrator	February 28	
10	<b>Terminate Summer Instruction Program</b> Take appropriate action to terminate any summer instruction to include disseminating information to community and cancelling staff summer contracts	School Administrator	March 30	
11	<b>School Choice Fair</b> Coordinate and advertise School Choice Fair and assist students with enrollment choices, transition and providing student information t <i>*Provide list of participating schools and date of School Choice Fair to CSD Director and PEC Chair</i>	School Administrator	Feb 1-April 1	
12	<b>List of School Vendors</b> Create list of all vendors serving the school with contracts in effect <i>*Provide to CSD Director; Deputy Secretary of Budget &amp; Finance; Director of School Budget &amp; Finance Analysis Bureau and PEC Chair</i>	School Business Manager	April 1	
13	<b>Notification to Vendors and Other Service Providers</b> Current vendors	School Business Manager	April 1	

	<p>IRS Status-Cancel/Update                      NMPSIA                      RHC                      ERB                      Any Grantors                      Etc.  <i>*Provide to CSD Director; Deputy Secretary of Budget &amp; Finance; Director of School Budget &amp; Finance Analysis Bureau, and PEC Chair</i></p>			
14	<p><b>Staff Closure Transition Letter</b></p> <ul style="list-style-type: none"> <li>• Outline transition plans and timelines for staff including:                              Plan for final contract payout;</li> <li>• Date insurance will terminate; and</li> <li>• Where employment verification requests can be made after June 30 (which would be CSD or its vendor)</li> </ul>	School Business Manager and Legal Counsel for PEC	April 1	
15	<p><b>Complete Form NMPED 947 and Disposal Plan</b></p> <ul style="list-style-type: none"> <li>• Develop disposal plan that documents disposition of school funds, property, and assets in accordance with provisions of NMSA § 22-8b-12.1(C)<sup>1</sup></li> <li>• Complete Form NMPED 947</li> <li>• Generate list of inventory assets with photos distinguishing between property purchased with operational or federal funds (such as Title 1) as well as equipment purchased through E-Rate</li> <li>• Once NMSA § 22-8b-12.1(C) has been satisfied, disposition of property will be offered 1<sup>st</sup> to state-authorized charter schools then 2<sup>nd</sup> to other public schools</li> <li>• Identify fixtures that are not available for disposition</li> </ul> <p><i>*Provide list of inventory assets; documentation of disposition of property pursuant to NMSA § 22-8b-12.1(C); notice letter to State Auditor; GB agenda and approved minutes; NMPED 947 form; and list of schools taking possession of assets to CSD Director and PEC Chair</i></p>	PEC Chair, Closure Vendor with cooperation from School Administrator	April 30	

<sup>1</sup> When a charter school is closed, the assets of the school shall be distributed first to satisfy outstanding payroll obligations for employees of the school, then to creditors of the school and then to the state treasury to the credit of the current school fund. If the assets of the school are insufficient to pay all parties to whom the schools owes compensation, the prioritization of the distribution of assets may be determined by decree of a court of law.

17	<p><b>Digitize Faculty/Staff Files</b></p> <ul style="list-style-type: none"> <li>• Provide employment verifications to staff</li> <li>• Ensure all staff files are organized, up-to-date and maintained in a secure location (<b>Place in moveable boxes</b>)</li> <li>• Digitize contact information for each faculty/staff (e-mail, phone, and address)</li> <li>• Digitize signed employment verifications</li> </ul> <p><i>*Provide to CSD Director</i></p>	School Administrator	May 30 or when contracts have terminated	
18	<p><b>Digitize Student Files</b></p> <ul style="list-style-type: none"> <li>• Digitize special education records</li> <li>• Digitize 504/SAT records</li> <li>• Digitize cumulative student files</li> <li>• Digitize transcripts</li> </ul> <p><i>*Provide to CSD Director</i></p>	School Administrator	May 30 or when coursework have been completed	
19	<p><b>Bank Signatory Authority</b></p> <ul style="list-style-type: none"> <li>• Obtain bank signatory authority for school bank account(s) for the PED Deputy Secretary of Finance &amp; Operations; Director of School Budget &amp; Finance Analysis Bureau</li> <li>• Remove school representatives from signatory authority (consequently school must not purchase items/supplies for the school WITHOUT approval of PED officials)</li> </ul>	School Administrator	June 30	
20	<p><b>Secure Financial Records</b></p> <ul style="list-style-type: none"> <li>• Provide list of outstanding financial obligations that are going to be known after June 30</li> <li>• Ensure all financial records are organized, up-to-date, placed in moveable boxes, and maintained in a secure location</li> </ul>	School Business Manager	June 30	
21	<p><b>Annual Audit and Final Audit</b></p> <p>Gather and organize all documents necessary to complete the annual audit and closeout audit</p>	School Business Manager	June 30	