Julia Hosford Barnes, P.C.

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Legal Memorandum

To: PEC   March 14, 2025
From: Julia Barnes for the Policy Committee
Re: Business Manager requirements

The policy committee has been asked to review the Personnel Change Notification form.

The relevant rule is a PED rule.

6.80.4.16 QUALIFICATION FOR BOARD OF FINANCE DESIGNATION:

A. Within 90 days of approval of its charter application, the governing body of a state-chartered charter school shall file a separate application with the commission seeking approval as a board of finance. This deadline may be extended by the commission for good cause shown.

B. The application shall include:

(1) an affidavit or affidavits, signed by the personnel who will be given the responsibility of keeping the financial records of the charter school, describing the training completed, professional licensure held and degrees earned by them;

(2) a statement signed by every member of the governing body that the governing body agrees to consult with the department on any matter not covered by the manual of accounting and budgeting before taking any action relating to funds held as a board of finance;

(3) a copy of a certificate of insurance that indicates that the person who will be entrusted with handling the funds of the charter school is adequately bonded;

(4) a signed affidavit from each governing body member declaring that the member is not a governing body member of any other charter school and that the member was not a governing body member of another charter school that was suspended or failed to receive or maintain their board of finance designation.

C. Within 30 days of filing of the application to qualify as a board of finance, the commission shall issue a decision approving or denying the application. A copy of the decision will be provided to the governing body and the commission.

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As the committee members discussed, the following edits are appropriate to the form:

Business Manager:

□ Board minutes acknowledging approving the business manager change

□ Affidavit of financial record custodian (a completed and notarized affidavit of financial record custodian)

□ Certificate of insurance (a certificate of insurance indicating the business manager is adequately bonded to take responsibility as the financial record custodian)

□ School business official license (copy of current, valid school business official license)