



## Freedom of Information Law - Subject Matter List of Records Maintained by the SUNY Charter Schools Institute

Last Amended: March 18, 2016

### **SCHOOL FILES**

*Note that for a variety of reasons including the age of a school, not every school will have a file or information in each category below*

#### Accountability

- Accountability Plans
- Accountability Plan Progress Reports
- Correspondence
- Performance Reviews and Summaries
- Comparative Performance Analysis Reports
- Renewal Reports
- School Visit Reports
- Enrollment and Retention Targets Information

#### Annual Reports

#### School Board Information

- Minutes
- Agendas
- New Trustee Information
- Annual Disclosures
- Policies (various, personnel, discipline, SPED discipline)
- By-Laws
- Codes of Ethics

#### Charters (includes renewal charters, extensions and revisions)

- Requests for Change in Programs/Revisions (including mergers)
- Charter agreements
- Incorporation Papers (provisional charters)
- 501(c)(3) Tax Exempt IRS Letters

#### Charter Applications (includes renewal applications)

- Letters of Intent
- Correspondence

- Community Outreach
- Notification
- Requests for Amendment
- Reviews and Evaluations
- Reports and Letters
- Applications
- Business Plans

Charter Management Organization or Educational Service Provider

- Management Agreement
- Related Contracts

Complaints

Enrollment

- Student Applications
- Application and Admissions Summaries
- Student Recruitment and Marketing Efforts Forms

Facilities

- Certificates of Occupancy
- Insurance Information
- Lease/Purchase Agreements
- Facility Completion Schedules
- Correspondence
- Miscellaneous
- Attorney Review Letters
- Mortgage/Bond/Financing Agreements

Financial Information

- Budgets (annual & start up)
- Cashflows (1<sup>st</sup> year schools only)
- Financial Statements (quarterly)
- Initial Statements
- Quarterly Reports (unaudited)
- Fiscal Dashboard Information
- Audited Financial Statements
- Management Letters
- Policy and Procedure Manuals
- Grant Information
- Insurance Information

FOIL

Requests made to Institute  
Correspondence

Litigation Information/Papers

Notification

Public Notices  
School District Notices

Prior Action Checklist Items

Probation/Violations

Violation Letters  
Corrective Plans  
Remedial Action Plans  
Resolutions

SUNY and Charter Schools Committee Resolutions Related to Charter Schools

**FILES RELATED TO THE OPERATIONS OF THE INSTITUTE**

Personnel

Budget

Procurement

Travel

Facilities

Contracts

Correspondence/e-mail

Newsletters

Litigation

FOIL

Events

General Information

- Website files
- Requests for Proposals
- Guidance Documents
- Policies

SUNY Charter Schools Committee Meeting Materials

- Summaries of Findings and Recommendations
- Renewal Reports
- Committee Resolutions
- SUNY Board Resolutions (related to charter schools issues)
- Grant Summaries
- Institute Update Memos

Grant Information (Charter Schools Stimulus Funds)

(Note that this information is held for all charter schools that apply for the grants regardless of whether SUNY is the authorizer.)

- Requests for Applications
- Applications
- Contracts
- Contract Revisions
- Correspondence with Recipients
- Reimbursement Documentation
- Correspondence Related to Grant Programs