



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

Last Amended: November 3, 2014

### **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
- Renewal Reports
- School Visit Reports

#### Annual Reports

#### School Board Information

- Minutes
- Agendas
- New Trustee Information
- Annual Disclosures

#### Charter and Applications

(includes both new charter applications and renewal applications)

- Requests for Change in Programs/Revisions
- Charter agreements
- Incorporation Papers (provisional charters)
- 501(c)(3) tax exempt IRS letters
- Policies (various, personnel, discipline, SPED discipline)
- By-Laws
- Codes of Ethics

#### Complaints

#### Enrollment

- Student Applications
- Application and Admissions Summary
- Student Recruitment and Marketing Efforts Form

Facility

Certificate of Occupancy  
Insurance  
Lease/Purchase Agreements  
Facility Completion Schedule  
Correspondence  
Miscellaneous  
Attorney Review Letters  
Mortgage/Bond/Financing Agreements

Financial

Budget (annual & start up)  
Cashflow (1<sup>st</sup> year schools only)  
Financial Statements (quarterly)  
Initial Statements  
Quarterly Reports (unaudited)  
Fiscal Dashboard information  
Audited Financial Statements  
Management Letters  
Grant information

FOIL

Requests made to Institute  
Correspondence

Litigation

Charter Management Organization or Educational Service Provider

Management Agreement  
Related contracts

Notification

Prior Action Checklist Items

Probation/Violations

Violation Letters  
Corrective Plans  
Remedial Action Plans

Resolutions

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

Personnel

Budget

Procurement

Travel

Facility

Contracts

Correspondence/e-mail

Litigation

FOIL

Events

General Information

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