Year Zero and Beyond: Know What You Don’t Know

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Kate Agostinelli, Foley and Lardner, LLP
Amber Raskin, SCVi Charter School
Jill Wells, EdTec
Session Goals

- Identify several major start-up tasks prior to charter school opening
  - Governance
  - Personnel
  - Student enrollment
  - Financial management
  - Operations
- Strategically prioritize tasks to build capacity
  - Who, what, when, how
Essential Questions

How long does it take from post-charter approval to open a charter school?

What are significant challenges in preparing to open a charter school?
Where to begin or continue?

- Categories of start-up tasks for charter school operation
  - Governance
  - Personnel
  - Students
  - Financial management & Operations
  - Facilities

- Other categories?
  - Academic program
  - Professional development
  - After school activities
  - Parent expectations
Responsibility Buckets

- Management
  - Executive Director and/or Principal
  - Founders
- Governance
  - Founding/operating board
  - Standing committees (per bylaws)
  - One time committees
- Other
  - Service providers
  - Volunteers
Who is/are the best matches for startup categories?

- Governance
- Operations
- Financial management
- Students
- Personnel
- Facilities

1. Executive Director
2. Principal
3. Other Administrator
4. Director of Operations
5. Office clerk
6. Board
7. Subcommittees
8. Parents
9. Community volunteers
Delegate
What, When, and How?

- Communicate clear expectations and resources
  - Guidelines/policies
  - Specific outcomes
  - Timeline
- Build in accountability for tasks
  - Weekly status updates
  - Reports to board
- Ensure quality control
  - Leverage expertise
  - When to outsource
Divide and Conquer
Student Recruitment

- Build awareness during chartering process
  - Interest forms
  - Community meetings

- Develop promotional materials (but don’t spend a lot of $$)
  - Flyers
  - Website

- Recruit and enroll ASAP
  - Do lottery leg work during charter submission
  - Recruiting becomes difficult after school opens
  - Remember attrition rates – 1-3%
Divide and Conquer (2)
Governance

- Startup vs. Operating Board
  - Recruiting and seating directors/officers
  - Avoiding burnout
- Training on general and specific roles
  - Guidance and leadership
  - Policy development
- Supporting the school
  - Time
  - Money
- Balance support with oversight and accountability
Divide and Conquer (3)
Personnel

- **Staff Recruitment**
  - When to start payroll? (Cash flow is key, regardless of guaranteed funds)
    - ED/Principal – 2 to 6 months prior to opening
    - Officer manager/staff – 2 months prior to opening
    - Teachers – 2 weeks prior to opening
    - Classified staff – 1 to 2 weeks prior to opening

- **Onboarding process**
  - ASAP – negotiation and process can take several months
    - Applications/references
    - Background checks
    - Employee agreements/salary/benefits
Divide and Conquer (4)
Financial Planning

- Startup vs. Operational Budget
  - Timing of revenues
  - Grant awards
  - Cash flow – loans?
- Financial reporting
  - Necessary skills
  - Requirements and timelines
- Educating leadership and board
- Contingency planning
Divide and Conquer (5)
Operations

- Logistical
  - Prepping environment
  - Coordinating daily structure/schedule
  - Understanding required reporting (ADA, CalPads, etc)
  - Payroll
  - Much more

- Strategic
  - Planning for future growth
    - Fundraising
    - Long term facilities
Year Zero and Beyond
Take Aways

- Develop realistic implementation plan
  - Clear delineation of roles and responsibilities
  - Communication is key to survival
    - Facility hiccups, parent issues, discipline, teacher frustrations
  - Don’t try to do everything in year one – not enough time or money

- Connect to professional support
  - Visit other schools, establish mentor relationships
  - Outsource what the school can realistically afford

- Remember: it’s about the students
  - If it doesn’t directly further the mission, reconsider its place in the food chain
Essential Questions Revisited

What are unexpected challenges in opening a charter school?

How do you leverage school stakeholders to prioritize and address these challenges?
Prioritize

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<thead>
<tr>
<th>Charter Approval</th>
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<tbody>
<tr>
<td>Facility</td>
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<td>Priority</td>
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Doors Open