



Business and Development
Specialists for Charter Schools

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

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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

Charter
Approval



Doors
Open

Facility	Personnel	Finance	Operations	Governance	Students



Priority