

## Charter School Start-up Tasks and Timeline:

### Sample for NEO-Authorized Schools

#### Charter School Start-up Tasks and Timeline

Task	Person(s) Responsible	Timeline
<b>Governance and Management</b>		
Ensure that contract with NEO is signed within 45 business days of MDE approval of the authorizer's affidavit and filed with MDE		
Beginning with the Governance Plan from the Charter Application, put in place the desired governance structure		
If not yet done, recruit board members with specific expertise (law, finance, real estate)		
Ensure board members attend department-approved training on board governance, the board's role and responsibilities, employment policies and practices, and financial management		
Identify and establish legal status (incorporation with state of MN; file with Attorney General's office)		
Obtain federal Employer Identification Number		
Develop by-laws		
Establish Board policies beginning with a Conflict of Interest policy		
File for federal tax-exempt status if not yet done		
Develop job description for Charter School Board members and Officers		
Develop a board manual		
Establish a board calendar		
Define communication methods to school leaders, staff, and community		
Obtain board liability insurance (Directors and Officers)		
Perform board self-evaluation		
Plan for transition of permanent board		
Review public meetings law		
Establish student data reporting system (MARSS)		
Establish credit with key vendors		
Develop a school calendar		
Establish transportation program		
Establish food service program		

#### **Personnel and Policy Development**

Define responsibilities for start-up coordinator and recruitment coordinator		
Hire start-up coordinator and recruitment coordinator		
Establish personnel policies/handbook		
Create student and parent handbook/ policy manual		
Beginning with the Administration Plan from the Charter Application, determine staffing needs		
Revisit position descriptions from the Application for key staff; revise if necessary		
Create timeline for hiring school staff, beginning with the lead		

## Charter School Start-up Tasks and Timeline

Task	Person(s) Responsible	Timeline
administrator		
Develop hiring policies and procedures		
Establish terms of employment		
Design benefit packages, vacation policies, pension policies, workers compensation, etc.		
Identify payroll system		
Develop staff policies		
Write/post job descriptions/ads		
Screen and select potential candidates		
Conduct background/reference checks		
Conduct orientation		
Create personnel files		
Establish enrollment, attendance, transportation, food services, dress code and harassment policies		
Acquire medical forms (students and staff)		
Design teacher evaluation system		
Design job-embedded professional development plans		

### **Learning Program**

Beginning with the Educational Program Model from the Charter Application, develop scope and sequence of learning outcomes		
Define the role of computers and other technologies in school operations and program		
Create a matrix of curriculum resource options which support attainment of the state academic standards; purchase curriculum materials		
Identify instructional strategies the school will use to achieve academic goals		
Identify and plan professional development for start-up period and first year of school operations		
Beginning with the Evaluation Plan and Student Performance Expectations in the Charter Application, develop the school's accountability plan including clearly defined means of tracking progress toward goals		
Identify and purchase appropriate standardized assessments to carry out the Evaluation Plan in the Charter Application		

### **School Culture**

Develop a student handbook		
Develop a school disciplinary policy that is compliant with the MN Pupil Fair Dismissal Act		
Train staff in implementation of discipline policy, student conduct		
Develop an intake process for students and families		
Provide for parent communications/meetings/newsletter		

### **Accountability**

Review accountability plan to ensure adequacy for meeting authorizer expectations		
Set date, prior to opening, to participate in administrative review with NEO		

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Set date to participate in goal setting exercise with school community		
Establish systems to collect and analyze accountability data		
<b>Financial Management/Business Plan</b>		
Beginning with the Financial Management Plan from the Charter Application, create a comprehensive business plan which includes a 4 year budget projection and 4 year market analysis		
Establish charter school business office		
Designate personnel for EDRS input; establish system for reporting finances to Board of Directors and Authorizer		
Report student count to MDE		
Establish bank depository for charter school funds		
Apply for planning grant if not yet done		
Track planning grant activities; refine grant budget if necessary		
Identify potential board members with a financial background		
Establish relationship, open account with local banking institution		
Designate financial manager for school		
Identify check writers and signers		
Establish separation of duties		
Develop internal controls and fiscal policies		
Establish staff benefits		
Develop and monitor cash flow plan		
Schedule regular board financial reviews		
Identify and purchase financial management software		
<b>Community Relations/Marketing</b>		
Develop a marketing plan		
Begin enrolling students		
Establish a positive public relations campaign		
Identify strategies to deal with external controversy/internal conflict		
Develop appropriate communications materials (brochures, newsletters, website)		
Identify community events at which to market the school		
Make parent/community involvement opportunities available; coordinate volunteers		
Identify strategies to recruit a diverse student body (community groups, etc.)		
<b>Partnerships</b>		
Identify potential partners in the community, develop plan to build relationships and utilize community resources		
<b>Regulatory issues</b>		
Review the MN state charter school statute		
Review civil rights/equity issues		
Develop a health and safety policy handbook		
Establish essential policies		
<b>Special Education</b>		
Identify and hire Special Education Director		

## Charter School Start-up Tasks and Timeline

Task	Person(s) Responsible	Timeline
Identify and hire Special Education Teacher(s)		
Create a system for identifying special needs students		
Fulfill Special Education Assurances checklist		
Identify contractors for supplemental services (speech, psychologist, etc.)		
Identify staff member to learn EDRS to ensure flow of Special Education funding		
Identify staff member responsible for Special Education record keeping procedures and district bill-back		

### Facilities

Conduct needs assessment		
Evaluate/inspect potential sites		
Review codes/ordinances/regulations		
Obtain resources for financing a facility		
Select site, considering expansion potential and any needed changes		
Consider how the facility supports the curriculum		
Obtain occupancy permit		
Negotiate lease for site		
Enlist facility design help		
Address building security issues		
Secure build-out financing		
Make necessary repairs/installations		
Arrange for custodial/maintenance services, if needed		
Establish insurance policies (including for property)		
Initiate lease aid application		
Furnish building, including IT systems		