

## Appendix 18: New School Start-Up Checklist

# New School Start-up Checklist



Updated: August 2016

OFFICE OF PUBLIC CHARTER SCHOOLS

Congratulations and welcome to Pillsbury United Communities (PUC) Office of Public Charter Schools (OPCS). We are very excited to begin this journey together as you prepare to open your new charter school. PUC-OPCS is committed to supporting our network of schools to offer bold and innovative strategies; provide an environment that promotes respect for all students and their individual identities; and engage students in academic and authentic learning opportunities, service learning, and personal development

The start-up phase of a charter school has an intensive timeline with major milestones that must be met in order for the school to open on time. Each school completes the *New School Start-up Checklist* in which the founding board identifies its internal deadlines, resources needed, and person responsible for accomplishing key tasks in the start-up process. Once accomplished, the board will provide evidence of each completed criteria. This document becomes the work plan for the founding board, the start-up coordinator (if one is hired). The *New School Start-up Checklist* is updated on at least a bi-monthly basis throughout the pre-operational period.

## Critical Target Dates\*

- Leadership:
  - A principal/director shall be hired by March 15
  
- Staffing:
  - 75% of the teaching staff shall be hired by April 30
  
- Facility:
  - A facility shall be secured by March 31. Any significant build-out of the site shall begin no later than May 1.
  
- Recruiting/Enrollment:
  - The school will have a database consisting of contact information for interested students/families that is 125% of projected enrollment by May 1
  - The school will have 75% of projected students officially enrolled by May 31

**\*If the founding board is unable to meet one or more of these critical targets, it will submit a plan detailing how the criteria will be accomplished by June 1. In the event the criteria are not met by June 1, PUC-OPCS, at its own discretion, may decide to postpone the opening of the school by one year.**

**Pre-September**

Task	Category	Person(s) Responsible	Completion Date	Verification
Apply for Federal Charter School Program (CSP) start up grant	Financial			
School charter approved by Commissioner of Education	Governance			
Determine governance structure and distinguish responsibilities of the board, including job descriptions for board members and officers. <ul style="list-style-type: none"> <li>• <b>School board chair may not also serve as treasurer</b></li> <li>• <b>Executive director may serve on board as ex-officio member only</b></li> </ul>	Governance			
Create board committee structure and focus for each, e.g. finance, governance, development/marketing, etc.	Governance			
Recruit board members <ul style="list-style-type: none"> <li>• <b>Need minimum of five members</b></li> <li>• <b>Need board members with expertise in law, finance and real estate</b></li> <li>• <b>At least one board member should have expertise regarding the school mission and program concepts</b></li> </ul>	Governance			

<ul style="list-style-type: none"> <li>Board members may not be independent contractor for school</li> </ul>				
Conduct background check on board members	Governance			
Develop bylaws and approve by board (MACS provides free legal assistance with this)	Governance			
Signed conflict of interest statements from each board member	Governance			
Develop board meeting schedule and calendar	Governance			
Secure board and management liability protection	Governance			
Ensure board members are familiar with public meetings and open meeting law. Meetings must be held at least monthly with agendas published prior to meetings and minutes published after meetings.	Governance			
File articles of incorporation with MN Secretary of State	Leadership/Operations			
Charter Agreement Contract between PUC-OPCS and operator is finalized and filed with the commissioner within 90 days of charter approval.	Leadership/Operations			

## September/October

Task	Category	Person(s) Responsible	Completion Date	Verification
Operator (if applicable) participates in MDE approved training	Leadership/Operations			
Develop an income statement, balance sheet and cash flow projections month by month for the opening school year, including detailed assumptions.	Financial			
Develop monthly Administrative/Financial reporting package for board and authorizer	Financial			
Refine planning grant as needed	Financial			
Create comprehensive business plan which includes a 4 year budget projection	Financial			
Board participates in MDE approved training	Governance			
Create list of board policies to be developed, set schedule of action	Governance			
Set up central file for key documents, e.g. contracts, board minutes, by laws, articles of incorporation, tax forms and audit reports	Governance			
Develop a Board binder	Governance			
Develop website	Marketing/Enrollment			

*See Minnesota Department of Education- Charter School Website Compliance Checklist				
Create marketing committee	Leadership/Operations			
Identify community events at which to market the school	Leadership/Operations			
Develop a marketing plan	Leadership/Operations			
Identify potential partners in the community, develop plan to build relationships	Mission, Strategy and Goals			
Develop intake process for students and families to include lottery, policies, etc.	Leadership/Operations			
Develop application and enrollment forms (including medical)	Leadership/Operations			

## November/December

Task	Category	Person(s) Responsible	Completion Date	Verification
Acquire forms (purchase orders, etc.)	Leadership/Operations			

Establish relationship, open account with local banking institution – require two signatures	Financial			
File for sales tax-exempt number with state of MN	Financial			
File for Employee Identification number (EIN) with IRS	Financial			
Develop school calendar	Leadership/Operations			
Develop a business administration policy and procedures manual documenting internal controls for purchasing, receipts, donations, petty cash, staff reimbursement, bill payment, capital expenditures, etc. Be sure to address separation of duties.	Financial			
Conduct needs assessment for facility and identify options	Leadership/Operations			
Evaluate and consider potential sites <ul style="list-style-type: none"> <li>• <b>Consider how the facility supports the curriculum</b></li> <li>• <b>Consider expansion potential</b></li> </ul>	Leadership/Operations			
Review codes/ordinances/regulations for school facility	Facility Leadership/Operations			
Select school facility site	Facility			
Ensure enrollment plan supports lease aid required to support the lease cost. Ensure rates are secured for second term of lease.	Financial			

Have lease reviewed by legal counsel and appropriate person at MDE (lease must be signed by March 31)	Leadership/Operations			
Consider hiring ad hoc community liaisons to assist with marketing to specific communities	Leadership/Operations			
Make parent/community involvement opportunities available	Leadership/Operations			
Create marketing and communications materials (brochures, newsletters, etc.) * Best to do once facility is secured	Leadership/Operations			
Develop position description for director and obtain board approval	Leadership/Operations			
Identify who/what role is responsible for personnel function and how they will ensure the school complies with employment laws.	Leadership/Operations			

## January/February

Task	Category	Person(s) Responsible	Completion Date	Verification
Secure insurance coverage	Financial			



<ul style="list-style-type: none"> <li>• <b>Liability</b></li> <li>• <b>Errors and omissions</b></li> <li>• <b>Surety bonds</b></li> <li>• <b>Property and casualty</b></li> <li>• <b>Workers compensation</b></li> <li>• <b>Health insurance</b></li> </ul>				
Employ Administrative/Financial person or contract with a company that specialized in educational Administrative/Financial	Financial			
Identify and purchase UFARS compliant accounting software if doing accounting in-house	Financial			
Establish direct deposit (EFT Authorization) with MN Department of Finance	Financial			
Secure necessary cash flow borrowing through bank line of credit or other appropriate lending source	Financial			
Register with Minnesota Unemployment Insurance (UI) Program	Financial			
Review projections with sponsor and obtain board approval by June 30	/Financial			
Set up office / Hire support staff if possible	Leadership/Operations			
Enlist facility design help	Leadership/Operations			
Address building security issues	Leadership/Operations			

Secure Food and Beverage License with MN Department of Health	Leadership/Operations			
Secure build out financing (if applicable) Significant build-out started by May 1.	Finances			
Set up Public Employees Retirement Association (PERA) account	Financial			
Set up Teachers Retirement Association (TRA) account	Financial			
Post director position with hiring to take place by March 15	Leadership/Operations			
Hire start-up and/or enrollment coordinator where applicable	Leadership/Operations			
Clearly define start up coordinator responsibilities and authority (what can be done without specific board approval)	Leadership/Operations			
Create personnel policies/handbook including hiring policies and procedures	Leadership/Operations			
Determine staffing needs (teachers, paras, office staff, business/finance, etc.)	Leadership/Operations			
Establish terms of employment	Leadership/Operations			
Design benefit packages, vacation policies, pension policies, workers compensation, etc.	Leadership/Operations			

Write job descriptions for all positions	Leadership/Operations			
Identify and hire special education director by March 1	Leadership/Operations			
Create employment/staff handbook	Leadership/Operations			

## March/April

Task	Category	Person(s) Responsible	Completion Date	Verification
Confirm transportation needs and options	Leadership/Operations			
Develop list of potential business options/vendors	Financial			
Hire payroll service company to prepare paychecks and file payroll taxes	Financial			
Determine teacher salary payments (over 10 or 12 months) and payroll periods	Financial			
Arrange for building custodial/maintenance service	Leadership/Operations			
Make necessary repairs/installation to facility	Leadership/Operations			
Confirm facility is secured by March 31	Leadership/Operations			

Develop scope and sequence of learning outcomes	Academics			
Create a matrix of curriculum resource options to make informed decisions	Academics			
Identify instructional strategies the school will use to achieve academic goals, e.g. project-based, blended learning, personalized learning plans, etc.	Academics			
Develop curriculum based measures to track progress toward academic goals	Academics			
Identify and plan for any curricular staff development needs	Academics			
Post job ads (75% of all teachers hired by April 30 and all teachers hired by July 1) Including Special Education teacher(s)	Leadership/Operations			
Screen and select potential candidates	Leadership/Operations			
Once finalists are chosen, conduct criminal background/reference checks. Verify licenses.	Leadership/Operations			
Design teacher evaluation systems	Leadership/Operations			
Design staff development plans	Leadership/Operations			
Confirm Director hire by March 15	Leadership/Operations			
Confirm 75% of teachers hired by April 30	Leadership/Operations			

Develop student handbook	Leadership/Operations			
Develop student disciplinary policy that is compliant with the MN Pupil Fair Dismissal Act	Leadership/Operations			
Ensure Application for Special Education Funds – Statement of Assurances is filed with MDE (generally due by June 1)	Financial			
Identify contractors for supplemental services (speech and language, psychologist, etc.)	Special Education			
Create a system for identifying special needs students	Special Education			

## May/June

Task	Category	Person(s) Responsible	Completion Date	Verification
Participate in ready-to-open meeting with PUC-OPCS	Administrative/Financial			
Secure audit firm capable of performing public school audits	Administrative/Financial			
Submit initial student enrollment list for MARSS	Administrative/Financial			
Confirm completion of Lease Aid application	Administrative/Financial			

Transportation plan developed and approved (necessary contracts signed)	Administrative/Financial			
Confirm any significant build-out on facility begins by May 1	Facilities			
Secure maintenance/custodial services	Facilities			
Identify and purchase appropriate standardized assessments	Learning Program			
Purchase curriculum materials	Learning Program			
Complete professional development plan	Learning Program			
Database of interested families is 125% of projected enrollment by May 1	Marketing/Enrollment			
Enrollment target of 75% met by May 31	Marketing/Enrollment			
Conduct criminal background/reference checks for all staff/faculty	Personnel			
Identify staff member to learn EDRS to ensure flow of Special Education funding	Special Education			
Enter special education and Federal Title Program staff into MDE EDRS system	Special Education			
Identify staff member responsible for Special Education record keeping procedures and district bill-back	Special Education			

## July/August

Task	Category	Person(s) Responsible	Completion Date	Verification
Onboard to Epicenter or make alternative plan for ongoing document submission	Administrative/Financial			
Train staff in implementation of discipline policy and expectations for student conduct	School Culture			
100% of teachers hired by July 1	Personnel			
Conduct staff/faculty orientation	Learning Program			
Conduct board self-evaluation	Governance			