Charter Support Unit
Supporting Florida's Charter Schools
(727) 286-3185 ☆ www.flcsu.org

New School Checklist

The following list are suggestions for things that charter schools may want to consider in starting their charter school. Unless specifically identified, these are not specific legal requirements, but recommendations. The timelines are also not necessarily required, but just recommendations to help you prepare everything is prepared.

Table of Contents:

Checklist

Each item on the checklist has a "Cat" identified (Category) which corresponds to the descriptive categories below. They are abbreviated as:

Cr – Curriculum
Di - District Relatoinships
Em - Employment / HR
Fc - Facilities

FFE - Furniture / Equipment
FM - Financial Management
FS - Food Services
Or - Organizational Needs

Re - Student Recruitment
SM - Student Management
Sy - Create "Systems"
Tr - Transportation

12 - 20 Months Before Opening (Before applying)

Cat	Responsible	When	Task
Or		July	Ensure Articles of Incorporation have been filed
Fc		Sept	Build relationships with your county and municipality
Re		Dec	Develop school message/image
Re		Dec	Develop a marketing plan
Re		Dec	Develop Website
Re		Dec	Develop Brochure
Re		Dec	Develop a system for organizing student applications
Re		Dec	Develop a student application packet and form
Re		Dec	Establish application "deadline" for the student lottery

8 - 12 Months Before Opening (Aug - Jan)

Cat	Responsible	When	Task
Or		ASAP	Apply for 501(c)(3) status
Sy		Aug	Create a "docket" system to manage deadlines and contract requirements
Di		Dec	Complete negotiation on charter contract
Or		Jan	Adopt corporate ByLaws
Or		Jan	Apply for Sales Tax Exemption
FM		Jan	Setup Bank Account
FM		Jan	Setup Accounting System and Chart of Accounts

Em		? Jan	Post, Recruit, Interview and Hire Principal / Director
Or		Feb	Run background checks on all Board Members
Di		Feb	Request a list of items your district will want and deadlines
Or		Feb	Setup and schedule Board Member training
FM		Mar	Develop accounting process

4- 8 Months Before Opening (Feb - Apr)

Cat	Responsible	When	Task
Or		Feb	File your corporate annual reports
Re		Apr?	Conduct Lottery
FM		Apr +	Update budget based on most accurate information (repeat as necessary)
Em		Mar	Establish Policies and Employee Handbook
Em		Mar	Establish Payroll Process
Sy		Apr	Inventory management system
Em		Apr	Establish Hiring Process
Cr		Mar	Select samples of textbooks to review
FFE		Apr	Develop a list of needs / wants for each classroom

2-3 Months Before Opening (May - July)

Cat	Responsible	When	Task
Or		May	Adopt comprehensive policy manual
Or		May	Seek out and obtain Insurance Policies
SM		May	Develop student handbook
SM		May	Develop forms you need families to complete
Em		May	Establish employee benefits
Tr		May	Review potential transportation vendors
FS		May	Decide how lunches will be provided
FFE		May	Research prices
SM		June	Develop Safety Plans and Emergency Procedures

Cat	Responsible	When	Task
FS		June	Decide if you wish to pursue NSLP
Cr		June	Develop a process for receiving the curriculum materials
Fc		June	Establish utilities
FFE		June	Place orders for necessary items
SM		July	Develop Day One Procedures
Cr		July	Submit purchase orders to order the textbooks
Fc		July	Prepare your space
FFE		July	Ensure items are properly inventoried

1 Month Before Opening

Cat	Responsible	When	Task
FS		Aug	Explicitly plan for lunch period

Organizational Needs

- **Ensure Articles of Incorporation have been filed**   **July the year of applying**
  - Your articles of incorporation are typically completed prior to applying for a charter school in order to prove that your organization has been founded as a not-for-profit agency. You could make this form complex, or you can use an online template that will create a very basic set of articles. Filling instructions can be found on sunbiz.org

- **Adopt corporate ByLaws**   **January of year opening**
  - The ByLaws are the second level of corporate documents, below the Articles of Incorporation. They typically outline the way the Board of Directors operates, how many member are on the Board, etc. Be sure your ByLaws align with Board requirements you set up in your charter application.

- **Adopt a comprehensive policy manual**   **May of year opening**
  - Policies are how the Board of Directors directs how the school will operate. While many charters may want to operate autonomously and get away from a bureaucracy, having policies helps things to run more smoothly. Inevitably you will have parents or others who will question the way things are being operated. By having a policy it protects the school, and helps protect the staff and administration. There are a few ways you can consider starting this process - one would be looking at your district's policies and deciding which you want to abide by, and modify and adopt those to match your school. Alternatively you can find from policies from other groups (such as the sample policies available from the Charter Support Unit) and modify them to apply to your school.
  - We recommend your school adopts a method of organizing the policies, even if you only have a few policies which have been approved by your board. As you face issues during your operation, it will likely result in the Board adopting policies to deal with similar issues as you move forward. Having a framework and way of organizing the policies will help know how to keep them together and refer to them.

- **Apply for 501(c)(3) status**   **As soon as possible**
  - Charter schools are eligible to be classified as charitable organization under IRS Section 501(c)(3). This will prevent you from needing to pay federal taxes, and allow people who make contributions to your school to consider them tax deductible charitable contributions. Once this application is submitted, it can take a long time to be approved (upwards of a year or more), therefore you will want to submit this application as soon as possible... this application can be submitted before your application is approved, if you would like. The prerequisite would be that you have already submitted your Articles of Incorporation and applied for a Federal ID number. In order to apply, you must complete IRS Form 1023. There is also a set of guidelines and questions that they look at for Charter Schools. It is recommended that you include an appendix to address the concerns on the guide. The guide is posted within the CSU Clearinghouse.

- **Run background checks on all Board Members**   **As soon as contract is approved**
  - All Board members need to go through Level 2 background checks (fingerprinting). We recommend you do this as soon as possible once your contract with the district is approved. .Most of the time these background checks are done through sponsor.

- **Apply for Sales Tax Exemption**   **As soon as contract is approved**

- ○ Complete Florida Form DR-5 (Application for Consumer's Certification of Exemption) for sale tax exemption. This will allow you to not pay for sales taxes for items that are purchased for the school. Be sure to have a copy of your signed School District Charter Contract or School District Approved Meeting Minutes showing that your charter was approved.

- **Setup and schedule Board Member training**   **Within 3 Months After Contract**
  - ○ Charter School Board members are required to participate in governance training from a state approved provider. The state requirements are that new Board Members complete the training within 90-days of joining the Board. No official information states at what point a new charter school must complete the training, but most contracts do. We recommend that this be completed as early as possible, but no later than 3 months after the contract was signed. The State of Florida has an approved list of vendors on the School Choice website.

- **Seek out and obtain Insurance Policies**   **May of Year Opening**
  - ○ We recommend you find an insurance agent who you trust and understands charter schools. Once you find an agent you are comfortable with and who seems knowledgeable with your needs, then share with them your charter contract which outlines the specific requirements you must abide by. Most insurance agents work with the same groups of providers so they will often have the same policy prices, so it is important you are comfortable with the services not just the prices they have to offer. Your agent will help you to decide when the insurance policies need to begin and how to ensure you have appropriate coverages.

- **File your corporate annual reports**   **Annually by May 1**
  - ○ Annually you must submit an annual report to SunBiz.org updating your corporate status, board members, etc. It is a simple process, but there is a fee involved. The annual report can be filled from January 1st through May 1st, and there is a fine if it is filed late.

Student Recruitment

- **Develop school message/image**   **As soon as possible**
  - You likely have your mission and vision outlined in your charter application already. It is now time to find a way to synthesize your message and get it out into the community. You need to make sure your vision is in a format that you can easily put into brochures and fliers and into the community. We recommend you have some sort of an image to try to unify your materials, whether that be a logo or a design concept. Use this to make brochures and fliers to promote your school. Review your vision from your application from the perspective of a parent who does not know anything about education, and make sure it is clear to those who don't understand educational jargon. Some organizations create a 'style template' which defines the vision and messages the style will use (fonts, colors, logos, branding, etc.). This helps you to have a consistent look and message.

- **Develop a marketing plan**   **Once Application Is Approved**
  - Some schools work with marketing agencies, however, this is an expensive choice. At a minimum, you should have had a plan in your charter application for how you were going to recruit your students. Review that plan to make sure it is still applicable, and start implementing the plan. Do not put off recruiting students. It is easy to get so busy with employment and facilities that recruitment efforts can be put on the back burner, but this dangerous, as you need the students in order to survive as a school.

- **Develop Website**   **As Soon as Possible**
  - Having digital resources is extremely important nowadays. We highly recommend you have a website established with information about your school and the application process. Many schools will hire another person or company to develop their website. If you choose to go this route, we strongly recommend that the school administrator be trained or know how to update the website. As you get closer to your opening, it will be important that you be able to post additional information for your families, and if you need to pay a third party to do this, you're likely to avoid posting information. Be sure to view your website from the perspective of a parent (or ask a few parents to review and provide feedback). Think about what questions parents will have when they visit your sites, and make sure that information is easy to find. Many charter school websites leave more questions than answers, and this does not help to put a positive image out about your school.
  - We also recommend you register a domain as soon as possible for your school (the website address). Many "registrar" sites are available where you can purchase your domain, even before you are ready to put your website online.
  - We also recommend using your new domain to establish email addresses for the school as soon as you get your domain, so that you have a consistent email address as you are working to develop the school.
  - There are statutory requirements about what is *required* on the site, such as management companies, performance criteria, board members, etc. Make sure whoever is designing your website is familiar with these requirements.

- **Develop Brochure**   **December the year before opening**
  - Part of your marketing plan will likely be the development of marketing materials. An important document to create is a brochure highlighting the great things your school will have to offer. When developing a brochure, be sure to think like a parent, and what questions and issues the parents will want to know, and address those issues in your brochure. Printing brochures can be expensive for new schools so you will want to shop around for cost-effective printers. There are many printers online where you can get quotes. Another option is the state's prison system runs a print-shop for reasonable rates that you may want to include in your search: pride-enterprises.org.

- **Develop a system for organizing student applications**   **December before opening**
  - As you start receiving student applications you will want to have a method prepared to organize these applications. There are no requirements for how you organize these, but you will want to make sure you have something ready. One option to consider would be to have binders for each grade level, and store the applications in alphabetical order in the appropriate grade level binder. You may want to indicate the date/time each application is received on the application as well.
  - If you are developing a computer database or spreadsheet for tracking students, think ahead about how you may want to use the database, and make sure you set it up to meet those needs. For example, if you have the address in the list, you may want to be able to sort students based on city limits or zip codes for mailing in the future, which will mean you will want to have separate fields for "city" or "zip" instead of just one "address" field. Also be sure that you secure this type of data and don't allow students' personal information to accessed outside of your school.
  - There are many products you can purchase for tracking applications and to use as a "Student Information System". Often district systems are not flexible enough to be used by Charter Schools and are complicated. However, if you do decide to use your own system, you will want to be sure there is a way to get information from your system into the district system, as you will be required to use the district's system for reporting FTE. In many cases this may require double data-entry.

- **Develop a student application packet and form**   **December before opening**
  - You may want to put together a packet of information to give families when they inquire about your school. Remember your messaging and imaging to help parents feel confident about your school. Given that you are opening a brand new school you are asking parents to put a lot of trust that you will be able to pull all of this together in time for their child, so make the packet a positive statement to build that trust. Explain your enrollment process, have the enrollment form, and information about when they can expect to receive more information. Be sure to post this on your website, and have some hard copies available when requested.

- **Establish application "deadline" for the student lottery**   **December before opening**
  - In your charter application you should have outlined your enrollment processes and deadlines, review this and make sure they are still applicable, and be sure to widely publicize these dates. Especially if you end up becoming a CSP award recipient, you need to make sure the public has had ample opportunity to apply and that all students have an equal chance of being accepted. You can setup multiple lotteries if you wish, for example, have an enrollment deadline of January 1 through March 31, with the first lottery to occur early in April. Then all applications received from April 1 through April 30 will be considered to the second enrollment lottery to be held early in May. This allows you to start enrolling students while still providing a fair selection process. Just be careful to make sure that the first enrollment period is widely publicized and that it is sufficiently long to give people the opportunity to apply. Part of CSP requirements will be to show that marketing has occurred during the first enrollment window so that the general public can apply and that the enrollment window is not only available to people who already knew about the school.

- **Conduct lottery (if you have more applications than spots available on the deadline)**
    - .Be sure to review your charter application and conduct your lottery as you said you would. The important thing is to conduct the lottery in such a way that leaves no doubt as to the authenticity of the random selection. This could be by having a public lottery and manually pulling names out of a container. It could be through the use of a third party or online lottery process. Whatever process you use, you want to make sure it is adequately documented so that no one can accuse your school of "rigging" the results.

Student Management

- **Develop student handbook**   **May before opening**
  - You will probably want to develop a student or family handbook to provide to families when they are accepted to your school. This document should outline the various rules and policies you will have and the expectations you will have at your schools, as well as provide parents with the information they will need to be comfortable with the operation of your school. If you've established policies, many of these policies will probably be in your handbook. Your charter contract and application may have specific language requiring you to abide by the district's Code of Student Conduct or other similar documents, and if this is the case, you will want to be sure that whatever you put in your student handbook aligns with these requirements. Some of the items you may wish to include in the handbook include:
    - Behavior expectations and discipline procedure
    - Medication rules
    - Dress Code
    - School Calendar
    - Information on Special Programs (i.e. Before/After Care)

- **Develop forms you need families to complete**   **May Before Opening**
  - While many charter schools plan to open with autonomy and the flexibility to operate as they see fit, we recommend you consider putting formal processes and things like student forms in place to ensure you have the information and documentation you need to operate effectively and to cover any liability the school may face. We recommend you develop a basic template for developing forms so that you can consistently use this when you need to develop something new. Many schools have a separate application and enrollment process. The application only asks for minimal information to be able to accept the student, and once they are accepted there are myriad of other forms that you want the family to fill out to complete the enrollment process. We recommend creating a packet of all of these forms so that you can easily give them to new families as they are accepted. Some of the forms you may wish to consider creating include:
    - Emergency Contacts
    - Publicity Release
    - Student Handbook Acknowledgement
    - Allergies
    - Elective signups
    - Car pooling
    - PTO/PTA Membership

- **Develop Safety Plans and Emergency Procedures**   **June before opening**
  - Your school will need to establish emergency plans for fire, tornado, hurricanes, etc. Evacuation routes should be posted in each room. Teachers need to be made aware of the safety plans and should have them accessible. The CSU has developed a template that can help with creating a comprehensive safety plan which includes many possible crisis points. We recommend you have this in place when you move into the building so that you are not scrambling last minute. Remember that your safety plan is one of the few documents not covered by public record laws, and the document should be kept confidential.

- **Develop Day One Procedures**   <u>**July before opening**</u>
  - Starting a new school means there is no culture, there are no "norms" already established. Most educators who have experience probably already have set of norms in their head about how the school is supposed to operate. They have expectations about how students should walk in the hallway, where kids should line up, how the lunch line works, when to send students to the office, etc. The issue is that these cultural norms are different at most schools. Bringing together an entire staff of new people, and entire school full of new students means that no one will automatically just share these cultural norms. In all of the hustle of getting a school started, it is important that the school leader set aside time to think through all of these procedural things, establish them, and specifically teach and share them with the staff and students. Having these in place, and having all of the staff on the same page for day one will help the school year run much more smoothly. Schools that neglect to establish these norms often spend the critical first few weeks of the school year trying to put out fires that have arisen as a result of these procedures not being in place instead of establishing a culture of high expectations and academic excellence. The school leader may want to think through and share thoughts with the staff on issues such as:
    - How does drop off pick up work? Where do students go once dropped off?
    - How are parents handled who want to go to the classroom?
    - Where do teachers pick up their students?
    - What are the expectations when walking in the hallway?
    - Where do students line up and report to for lunch?
    - Where do students meet their teachers after lunch?
    - Do you have expectations about students using the bathroom during the day (i.e. hall passes)
    - If you have periods, what are the expectations of students during passing time
    - Where do students report to for dismissal?
    - When a student needs to be sent to the office, what is the process?
    - If teachers are having problems in their classroom, how do they get help?

Financial Management / Banking

- **Setup Bank Account**   **Varies**
    - As soon as the school starts getting money, you should setup a separate bank account specifically for your school. This includes donations, grants, etc. Having everything in a separate account helps to keep the audit trail much more clean. Most banks will require a resolution from your Board of Directors authorizing opening an account and identifying who the authorized signers on the account. Some banks require that all of the signers report to the bank together to sign the paperwork, others are more flexible. We recommend considering a bank that has options that will help you operate effectively, such as online banking/reports and the least amount of fees possible. Commercial bank accounts usually have significantly higher fees than personal accounts. Consider your usage, for example, if the bank charges a fee for each check you cash, and you plan on having many small checks for things like school lunch and field trips, this can quickly add up.

- **Setup Accounting System and Chart of Accounts**   **When you open checking account**
    - Once you open a checking account you should consider your accounting system. If you are going to be using an outside provider to manage your money, select this company at about the same time as you open your checkbook to make sure that the bank account is setup in a way that will work with the companies parameters. If you plan to manage your finances in house, we recommend putting all of your financial controls in place immediately. Even if you only have a few hundred dollars, you will need to account for all of those funds during your audit. We recommend selecting an accounting software package that allows you to do "fund based accounting." Many charter schools use Quickbooks, but many other options exist. Find one that matches the needs of your school. Charter schools are required to follow the Financial and Program Cost Accounting and Reporting for Florida Schools (Red Book) standards. Once you have selected your software, take the time to properly setup the chart of accounts to align with the redbook standards. Set up your funds, functions and object codes in the accounting system so that you can easily class your money in the correct way. The Charter Support Unit has developed a "cheat sheet" to assist with the development of this if you are new to the Red Book standards.

- **Develop accounting process:**   **When you open checking account, March of year opening**
    - As you are accountable for the money your organization we receives, we recommend setting up strict financial policies with regards to purchasing, deposits, reports, etc. When it comes time to do your annual audit, your auditor will want to see your policies and test that you are following what you said you would do.   The Charter Support Unit has sample policies if you would like to use them, and many other organizations have samples you can use as well. Be sure you clearly delineate who (by position) is responsible for what tasks, and that there are adequate separation of duties laid out. For example, the person who opens the mail should be different than the person who pays the bills, who is different than the person who signs the check, etc.
    - Part of these policies will likely also include developing a uniform set of forms and paperwork to track your financial processes. Some of the forms you may wish to consider establishing with your policies include:
        - Purchase Order Form
        - Petty Cash Form
        - Deposit Form
        - Check Request Form

- **Update budget based on most accurate information (repeat as necessary)   April before opening**
    - Despite your best efforts, the budget that you presented in your charter application is likely not the the same budget you will use once you begin your operations. Many of the assumptions you make during the application process are guesses. Once your organization has more firm number for expenses such as facilities, utilities, insurance, etc. you should be continuing to update your budget. We recommend by April or May of the year you open that you completely reexamine your budget. Usually by this time updated revenue estimates for the following school year are available and you should have some idea of how your enrollment is progressing, which will allow you to more accurately project your revenue. We recommend you go through this process before you start offering positions to employees, to ensure that the salaries you intend to offer will fit within the overall budget. This process should be repeated often over the next several months as more accurate numbers continue to be developed. Be sure your district has the most up to date budget, approved by your board, by the deadline outlined in your Charter Contract.

Employment / Human Resources

- **Establish Policies and Employee Handbook**   **Before hiring first employee**
    - While you may wish to operate with autonomy, when it comes to human resources, you need to protect the organization by having clear policies and procedures with regards to employment and payroll practices. If you are using a PEO the company may have an employee handbook already created that you can use as a starting point for these policies. The Charter Support Unit's sample policy document also have numerous employee policies you may wish to consider. A Google Search will find many employee handbooks and policies you can also use as models to develop your school's policies. We highly recommend you consider the following points in your policy and employee handbook:
        - Paid Time Off (Sick / Vacation Days)
        - Leave Policy (if you have more than 50 employees you must comply with FMLA, if you do not, you may wish to consider an alternative policy)
        - Employee Discipline (suspensions, documenting concerns, etc.)
        - Hiring process
        - Personnel Records
        - Dismissal process
        - Expected behavior

- **Establish Payroll Process**   **Before hiring first employee**
    - The school should establish a payroll process and calendar before hiring it's first employee so that all parties are on the same page. The two most common payroll schedules are either bi-weekly or semi-monthly. The Board should consider the cash flow needs of the school and the needs of the employees when making this decision. If the school elects to pay bi-weekly, there are two months during the year when there will be three pay periods during that month. However, that will not mean the district will be giving you any additional funds those months to cover your payroll, so you need to ensure your cash flow can handle that. Semi-monthly payrolls are less convenient with regards to when payroll needs to be processed, and how hourly employees account for their time, but do not present the cash flow issues twice a year, and easily align to the way the school receives FTE payments from the district. Most schools work with a payroll company in some sort. Many small new schools will use a "PEO" or "Leasing Company" whereby the employees are theoretically employees of the PEO, but the school makes all of the decisions. This allows the PEO to offer group health insurance rates which may be more advantageous to the school than trying to acquire benefits independently, but there is a higher rate than if you are only using a company to simply process the payroll. Using either a PEO or a separate company to process your payroll tends to be easier for the school, as calculating employee taxes and ensuring payroll compliance often requires HR specialists that most schools can not afford to hire. We recommend conducting an RFP and exploring the various options available. Once a company is selected ,the school can work with the company to establish the payroll calendar and process on how timesheets and payroll must be submitted and processed. We recommend developing a calendar listing the deadlines for when the school's personnel must complete payroll.

- **Establish employee benefits**   **May before opening**

- ○ Most charter schools elect to offer employee benefits, and new federal laws may require that schools offer health insurance benefits. Most new charter schools will work with a PEO / Employee Leasing Company who will include benefits as part of the overall package, which creates less work on the school. If the school has a sufficient number of employees to be cost effective to establish your own insurance groups, the Board may elect to offer benefits separate. The payroll costs associated with this are generally significantly less, but the costs associated with the benefits themselves may be higher as you will have a smaller employee group than a PEO can offer. If the Board elects to go this route, we recommend selecting an insurance agent you are comfortable working with, and then asking that insurance agent to price various employee benefit policies through various providers in your area to select the ones most advantageous for your school. We recommend trying complete this before you hire any employees, however, however, you may want to have the Principal work on this instead of the Board as it is a fairly detailed process, in which case the you will want to have the benefits established before most of your other employees are brought on.

- **Establish Hiring Process**   **April before opening**
  - ○ In your charter application you probably laid out parameters you intend to follow with regards to recruiting and hiring staff members. Generally these are broad plans. Before the significant hiring occurs during the summer of the year you open, we recommend putting in place specific processes with regards to hiring. You may wish to involve an attorney or HR specialist in these decisions to make sure you are protecting the organization from potential employment lawsuits. Things you may wish to consider in these processes include:
    - **Posting** - How are jobs posted, and where? How long should the be posted before a position is filled?
    - **Interviewing** - Who is responsible for interviewing? What process will be used? Are there specific qualities you require in your candidates to look for? How will you ensure that interview teams do not ask inappropriate / illegal questions?
    - **Deciding** - Who is responsible for making the final decision about offering a position? Some schools delegate this responsibility to the Principal, whereas others require the Principal make a recommendation to the Governing Board who makes the final decision.
    - **Offering** a position - will you have an "offer letter", and if so we recommend you create a draft.
    - **Background Checks -** Be sure you understand the requirements for your sponsor with regards to getting your potential employees cleared with a Level 2 background check. This should be done before someone is officially awarded a job.
    - **Contract** - We recommend you work with an attorney to review the contract you intend to use for employees
    - **New Hire Paperwork** - What new hire paperwork do you need? We highly recommend you develop a checklist to be kept in each employee's personnel file with all of the required new hire paperwork. We also recommend the office staff develop a spreadsheet or database to track this information in a quick and easy way.
    - **Orientation** - What things are important for new employees to be made aware of and how will they be introduced to their new position once hired. If they are receiving school assets (i.e. laptop computers, keys, etc.), how are these signed out to the employee?

- **Post, Recruit, Interview and Hire Principal / Director**   **November - June before opening**

- Hiring the Principal is the most important decision a Governing Board will make with regards to operating an effective school. We recommend a significant amount of thought and consideration go into this process. Some schools will go so far as to hire "head hunters" to help recruit top talent, but this is an expensive option. We recommend you put significant time into developing a job description and information about your school prior to posting the position. We also recommend you brainstorm the key traits and most important qualities you will be looking for before you begin, and when you develop your interview process, be sure you have interview questions or processes whereby you can evaluate the candidates on the traits you are looking for. If no one on the board has experience with interviewing and hiring, you may wish to consider hiring an outside consultant to assist with this process. When you hire the Principal will depend largely on the amount of money you have available, and when you can afford to bring the Principal on. We recommend trying to hire the Principal as early as possible, as there is a significant amount of work to be done to get the school up and running. Simply hiring the teachers is a full time job for a significant amount of time. Please see the recommendations under the previous point regarding "Hiring Process" for recommendations once you've selected a potential candidate for the Principal position.

Transportation

- **Review potential transportation vendors (i.e. private, district, etc.)**   **May before opening**
    - If your school will be offering transportation, we recommend you select a provider in May or June. We also highly recommend that your administrator read the statutes and administrative codes regarding transportation, as there are numerous responsibilities the school has with regard to transportation. Simply because you are hiring a vendor to run your busses does not relieve the school of these statutory requirements. The Department of Education also has a handbook that they've created for charter schools with regards to transportation. We recommend you first ask your district if they would be willing to work with you on transportation and then evaluate if the costs are effective. If not, we recommend you conduct an "RFP" (Request for Proposal) process and seek out proposals from various transportation providers. Bear in mind that in most districts, the district will need to approve the transportation provider, and this can take time, which is why we recommend you select a provider early to give your district enough time to authorize the busses and drivers prior to their starting in August.

Food Services

- **Decide how lunches will be provided (i.e. private, district, etc.)**   **May before opening**
  - If you are providing a lunch service, which is often a requirement, you will need to decide how this will be done. Most schools try to connect with the NSLP program in some way, however, in order to offer free and reduced lunches to students and receive reimbursement for those meals, you must go through an extensive training and approval process which takes several months. Most schools are not able to complete this process during their first year of operation, and need to find an alternative method of doing this during the first year. The first recommendation is that if your district is willing to work with you and take your school on as a "satellite site" we recommend pursuing this option. It will probably be the least stressful way to complete this task. Some districts are no longer allowing charter schools to participate in the district's program. In this case, some schools have been able to find other charter schools or organizations to partner with who will allow them to become a satellite under their program. Reach out to your local schools or support organizations to try to find available options. Once you have selected a group to work with, you will need to follow their procedures and requirements for selecting a lunch provider. If you are working with the district, they will likely assign you to a nearby school who will prepare your meals, and you will be required to either pay a delivery fee, or go to pick the lunches up daily. If you are working with another group, you may be able to select a vendor to provide the lunches, but you must follow a very stringent RFP process as described by the NSLP, and you will need to work with the sponsoring organization to ensure you meet the requirements.

- **Decide if you wish to pursue NSLP**   **June before opening**
  - If you are considering becoming a NSLP provider, we highly recommend you start this process as early as possible. The training and authorization process is extensive. The Florida Department of Agriculture and Consumer Services has a website for how to apply to be a sponsor. You must have your contract with the district, and be registered with the Department of Education prior to applying for the program, and you must then complete the required training. Plan to spend several months working on this process from start to finish and to be willing to dedicate a significant amount of staff time to completing the process.

- **Explicitly plan for lunch period**   **August before opening**
  - Lunch period can be an extremely stressful time around schools. It is unstructured time, and is often when behavioral problems occur. We highly recommend that the school's leadership team spend time walking through the lunch process and making sure all staff understand the process and expectations during lunch time so that they can adequately teach students the lunch. Some topics to consider:
    - Where do kids line up?
    - Are teachers required to stay with their classes?
    - Who staffs the lunch room (with regards to food service and student supervision)
    - Where will the food be served?
    - How will the flow be managed?
    - Lunchroom expectations.
    - Who sets up the lunch tables?
    - Who cleans up after lunch?

Create "Systems"

It is our recommendation that a well run, effective school requires many "systems" to help the school run smoothly. We recommend thinking about everything that you are doing with regards to developing a system to deal with issues. When you work with an issue, work to develop a way it will be handled in the future. This way you will be prepared when future issues come up.

- **Create a "docket" system to manage deadlines and contract requirements** **ASAP**
  - Managing the various tasks that need to be completed throughout the year is a difficult task. We highly recommend that the school leader and/or the Board develop a formal process for managing these deadlines. We recommend using some sort of an online calendar or task system which manages these deadlines. There are many online "project management" tools, "Tasks" tools, or even an online calendar that can do this. We recommend putting in everything that could possibly come up into this system. For example, go through your charter contract, and add any deadline in your contract to your task list. Anytime you sign any contract or agreement, if there are deadlines, add them right away. Go through and add things like filing your Form 990 to the IRS, your Annual Report to SunBiz.org, electing new Board Members, etc. Once the items are into the system, remember to regularly review the system. An online tool that emails automatic reminders is particular helpful in reminding you of upcoming deadlines.

- **Inventory management system** **April before opening**
  - One item that is often forgotten while ordering new materials before the school opens is to keep a physical inventory. You should check your charter contract for any requirements your school may have with regards to how an inventory must be done. Some districts require that items over a certain dollar amount be tagged with a unique identifying number. If you are a CSP Grant recipient, you must maintain separate inventories for any items purchased with CSP funds. Develop a spreadsheet or database early that you will use to manage your inventory, and as you are making your initial purchases of textbooks and furniture, immediately log these items as they are received. It is much easier to set this up early and manage it as things come in than it is to try to do an inventory after the fact when everything has already been distributed to classrooms throughout your school.

District Relationships / Information

- **Complete negotiation on charter contract**   **70 days after application approval**
    - Once your application has been approved by the district, the district has 30-days to present a sample contract to the school for negotiations, and then the school and district have 40-days to negotiate the contract from that point. We highly recommend that schools obtain legal counsel with regards to negotiating this contract and that the school <u>fully</u> understand the entire contract. This contract dictates the conditions under which your school will operate and is a key document in the life of your charter school. Once the contract has been completed the school leader and Board should be intimately familiar and may wish to reread the document on a regular basis to ensure compliance with the document.

- **Request a list of items your district will want and deadlines**   **After Contract Approval**
    - Most districts who have numerous charter schools now have checklists and lists of deadlines that they provide their charter schools with regards to when items must be completed and handed in. We recommend the school develop a task list of some sort to manage these deadlines and ensure these documents are completed on time. We have seen some contracts with language that if any items on these checklists are not complete on time, that this is good cause for the district to cancel the charter without notice. Throughout the life of your charter, having a positive working relationship with your district will make your life as school leaders much easier, and meeting these deadlines and maintaining an open line of communication with your district's charter schools office will help you to operate efficiently. We encourage you to consider this your first opportunity to put your best foot forward in proving to the district that you are committed to this open relationship and meeting the requirements of operating an effective school.

Curriculum

- **Select samples of textbooks to review**   **March before opening**
  - If you did not specify the specific curricular materials and textbooks that you will be using in your charter application, we recommend that you start evaluating the various options available to you and making a selection during the spring before you open. Most textbook companies will provide free samples of textbooks to schools to assist in this decision making process. We recommend first identifying the key aspects of what you want in your materials, and then how you will evaluate the series. Then request the samples and evaluate them against the qualities you have identified. The Charter Support Unit has a sample textbook evaluation matrix that you may wish to consider in developing your system. Be sure you pay attention to any publisher rules regarding the sample, some publishers may request that the samples be returned to them within a certain time frame otherwise the school could be billed for the materials.

- **Submit purchase orders to order the textbooks**   **July 1 before opening**
  - We recommend that schools place order for their textbooks as early as possible to ensure they are received on time. Most companies are receiving numerous orders during the summer and fulfilling these orders can be a lengthy process. If items are on backorder, this could mean your teachers will not have the materials they expect when school opens. Contact the companies you will be ordering from to determine what the processes are. Many charter schools will order from the Florida Textbook Depository. If you are a new customer, the depository does not place orders on credit, therefore you will also need to manage your cash flow in order to have the money available to place these orders.If you are a CSP recipient, be careful to pay attention to requirements with regards to the start date of your grant award as well as any required procurement processes you have in place regarding price comparisons before placing orders.

- **Develop a process for receiving the curriculum materials**   **June before Opening**
  - When your textbooks arrive you will have many boxes of books, and organizing these can become overwhelming as it happens at about the same time as teachers are arriving for work, and you are dealing with student enrollment issues. We recommend you plan ahead and have a process in place before you receive any materials. Are you going to individually barcode each book? If yes, be sure your spreadsheets/databases are ready and your barcodes and scanners are ready. Are you going to put a "Property of …" sticker in the books, if so have them ready. How will books be checked out to teachers / students? Be sure you think through and have these process in place and ready before the books arrive.

Facilities

Finding and acquiring facilities is the number one reason why schools do not open when they anticipate. Many municipalities have numerous restrictions on property use that need to be navigated. Once you find a potential location you need to ensure it is an appropriate site for a school. This would involve checking with your school district and the local municipality. Many municipalities are now requiring "traffic studies" be conducted to ensure that putting a school in the location will not too negatively impact traffic. There are numerous other studies and processes that need to be completed. You need to make sure you understand these requirements before committing to a property, and that you go through navigate them successfully in order to obtain a "certificate of occupancy" prior to opening your school.

- **Build relationships with your county and municipality**   **ASAP**
    - Building a positive relationship with the municipality you wish to locate the school will help. Find someone at "city hall" who you can talk to when you have questions and can point you in the right direction when you face issues. We recommend you work with a realtor, landlord, or other facilities representative who understand the local municipality and charter schools to help you with securing a property, getting appropriate permits, etc.
    Make sure you also understand any certificates you may need. Some jurisdictions in addition to requiring a "CO", you must also obtain an operating permit from the health department and other organizational units.

- **Establish utilities**   **Prior to moving in**
    - Dont' forget to establish your utilities and get the services you will need setup to your facility. Many utilities such as electricity providers require a significant down payment when establishing service, so be sure you understand these requirements and plan accordingly so you have the necessary cash flow to ensure proper services.
        - Electricity
        - Water
        - Telephone
        - Internet
        - Trash Pick Up

- **Prepare your space**   **July before opening**
    - Once you are able to move into your space be sure you prepare your classrooms not just with your furniture, but with regards to safety and facilities requirements as well. For example, every room (including bathrooms and closets) must be numbered, all classrooms must have evacuation maps posted, etc. The fire marshall may look for these while doing final inspections for the "CO", but they will certainly look for them when they show up to do an annual evaluation. It is a good idea to develop a schedule whereby a few times a year you periodically check these things to make sure they are still there, that emergency lights still work, and that teachers are following any necessary fire / safety codes. For example, most municipalities have a limit on the percentage of wall space that can be covered by paper or other flammable materials; teachers are notorious for trying to push that limit.

FF&E (Furniture Fixtures & Equipment)

- **Develop a list of needs / wants for each classroom**　　　　　　**April before opening**
  - We recommend that the school leader work with the Board of Directors to develop a list of what each classroom will be outfitted with as a standard prior to pricing or looking for materials. This list will help with future order and budgeting of materials.
  - Be sure to prepare a list for your front office and administration area as well, there's are specific item that the state requires: a fireproof file cabinet for student record. You'll also want to consider if you will need reception furnishings as well.
  - Check with school supplies companies that provide Government/Higher-Education contracts to save money on both furniture and general office and classroom supplies.

- **Research prices**　　　　　　　　　　　　　　　　　　**May before opening**
  - There are several companies who will help schools with outfitting their schools and specifically can take a list of items per room and develop a complete proposal for your school. Their price can even include coming into the school to install and setup all purchased items and to place them into the rooms they were ordered for. This convenience does come at a price. Other schools will look to piece meal their orders looking for the best price on each individual item, and then having a "volunteer day" where parents and community members can come in and help to assemble items. And others select options anywhere in between. Regardless of how you select to handle this process, we recommend you begin early searching for prices and developing your budget. Furniture is expensive. In addition, delivery times on Ok, items such as activity tables and student desks is many weeks as many company build them upon order as opposed to stocking large quantities. In addition, it is not unheard of for items such as student chairs to be out of stock around the opening of the school year. Don't forget to see what options you have through your district as well. Many districts have negotiated contracts / bids with vendors which are less than you may be able to find on school furniture items. Many districts also have a warehouse of "surplus materials" which charter schools may have access to. It is not unheard of for some schools to be able to furnish most of their schools with materials borrowed from their district. Be sure you understand the rules regarding inventory and ownership of these materials if you elect to go this route.

- **Place orders for necessary items**　　　　　　　　　**June/July before opening**
  - Be sure to understand the delivery timelines and options when placing orders, and place orders with enough time to ensure delivery between the time your renovations/constructions are complete and before the school opens.

- **Ensure items are properly inventoried**　　　　　　　　　　　**As Items Arrive**
  - We recommend you have an inventory system setup and ready before you start receiving materials, and that you inventory all items upon receipt, before they are delivered anywhere within the school.