## FACILITY
- Search for Facility and Negotiate Terms of the Deal
- Ensure Improvements and Repairs are made
- Purchase Furniture
- Ensure Delivery of / Adequate Space for Furniture
- Ensure Assembly of Furniture
- Ensure Technology Network is Installed and Tested
- Ensure Internet Connectivity is Installed and Tested
- Ensure Phone Lines, Phone System and Fax Machine/eFax are Installed and Tested
- Ensure Copy Machines are Delivered and Training is completed
- Finalize Facility Preparation (Prepare rooms and bulletin boards in Hallways, Post Room Signs and Emergency Exit Procedures, Ensure Staff Mailboxes are in place)

## HUMAN RESOURCES
- Finalize Organizational Structure
- Hire all Staff
- Draft, Send and Collect Signed Hire Letters for all Staff with support of Pro Bono Attorney
- Design Staff Pre-Ser-vice including time to build staff culture, discuss curriculum plans, work on long-term plans, and design Individual Professional Growth Plans
- Train staff on how to use the school database to track interim assessments and create report cards
- Train staff on all financial, operational, HR and safety procedures
- Enroll staff for all benefits selected by your school

## BUSINESS/FINANCE
- Hire Business Leader/Financial Services Provider
- Obtain Employer Identification Number (EIN)
- Apply for State Unemployment Number (if applicable)
- Select/administer all/some of staff benefits – insurance (health, dental, vision, long-term disability, short-term disability, life) and retirement plan (401k, 403b)
- Select and administer school wide insurance policies (umbrella, liability, D&O, student accident)
- Select Accounting System, get trained on its use and finalize enter chart of accounts
- Edit Budget to reflection current reality and enter it into Accounting System to automate production of Budget to Actual with Financial Projections Reports
- Understand all revenue streams – Per Pupil Funds, Special Education/ELL funds, PCSP, IDEA, Titles I-V and all other streams that apply to your state

## OPERATIONS
- Hire Operations Leader
- Recruit Students in any and every way possible
- Hold Lottery if more applicants than available spots
- Collect all enrollment forms from parents, review them as received instead of following up afterwards
- File all enrollment forms as required by law
- Communicate enrollment numbers with School Leader and Business Leader to ensure it is in line with budget
- Get trained on how to use school chosen student database
- Learn how to use State Level Student Information System, if applicable
- Administer Student Meals with School Food/Nutrition office in your State or alternate vendor and comply with laws
- Administer Student Transportation with Pupil Transportation office in your State and comply with laws
- Decide whether to contract with a Security Guard and/or Alarm System vendor and follow through accordingly
- Contract with F/T or P/T Nurse to both provide services and handle student health records and decide who serves as Nurse when s/he is not on-site
- Be ready to act quickly to draw students from the waiting list as soon as the end of the first day of school
- Be prepared to hold fire drills in accordance with regulations

## CHARTER AUTHORIZER AND BOARD OF TRUSTEES
- Ensure Board meeting minutes are documented and documents of school status and statistics presented at Board meetings are collected in binders and electronic copies as well (important for renewal)
- Vote on finalized budget and have it passed
- Finalize facility with authorizer and Board
- Have Board attend sessions held by support organizations that show board members proper governance and how to maximize the use of committees to make board meetings efficient
- Vote on HR Manual
- Vote on Operations Manual
- Vote on School Safety Manual
- Vote on conditional emergency staff appointments if not yet approved for fingerprinting (if applicable)
- Work with Authorizer to ensure readiness for first day of school and approval of financial policies and procedures
- Prepare Board to be less “hands-on” than they may have been during the planning phase

---

**Like this? Get more at CSBM.com/101**

888.710.2726 info@csbm.com