

# Charter School Start-Up Guide and Progress Checklist

## Audubon Center of the North Woods

Month & Task	Person(s) Responsible	Resources Needed	Date Completed - Progress
<b>October - August</b>			
<b><i>Financial Management/Business Plan</i></b>			
Create a comprehensive business plan which includes a 4 year budget projection and 4 year market analysis			
Develop at least two contingency budgets (one with lowest possible operating enrollment and one another enrollment scenario)			
Identify potential board members with a financial background			
Other			
<b><i>Governance and Management</i></b>			
Ensure contract with ACNW is signed and submitted to within MDE 45 days of MDE application approval			
Determine governance structure Identify legal status, tax-exempt status (file for 501c3 status)			
Other			
<b><i>Learning Program</i></b>			
Identify instructional strategies the school will use to achieve academic goals			
Other			
<b><i>School Culture</i></b>			
Develop mission/vision statements for the school			
Compose a brief history of the origin of the school and community need for the school			
Description of school (grade levels served, expected enrollment demographics, etc)			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>September</b>			
<b><i>Facilities</i></b>			
Conduct needs assessment Identify options and assess accessibility of proposed school locations			
Other			
<b><i>Financial Management/Business Plan</i></b>			
Establish relationship, open account with local banking institution, order checks			
Refine planning grant budget (if necessary)			
Hire auditor			
Designate financial manager for school			
Identify check writers and signers			
Schedule monthly board financial reviews			
Identify a team member to provide ACNW with monthly financial updates for grant money			
Other			
<b><i>Governance and Management</i></b>			
Recruit board members with specific expertise (law, finance, real estate, etc)			
At least five interim board members recruited (independent contractors may NOT be interim board members)			
The board adopts, and each individual signs, a conflict-of-interest policy			
Establish a board meeting calendar Obtain board liability insurance (Directors and Officers)			
Review public meetings law			
<b><i>Legal Issues</i></b>			
Review and print copies of MN Statute 124E for board members and staff			
Review civil rights and equity issues (including MN Education Statutes).			
Other			
<b><i>Community Relations and Marketing</i></b>			
Board creates a marketing committee			
Consider hiring a marketing/enrollment			

coordinator OR identify person responsible for organizing marketing/enrollment activities			
Other			
<b>Learning Program</b>			
Other			
<b>School Culture</b>			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>October</b>			
<b>Facilities</b>			
Evaluate/inspect potential sites			
Review codes/ordinances/regulations			
Consider seeking services of a Real Estate firm			
Research the MN Charter School Lease Aid formula			
Other			
<b>Financial Management/Business Plan</b>			
Develop internal controls and fiscal policies			
Acquire forms (purchase orders, checks, etc)			
Other			
<b>Governance and Management</b>			
A board member serves as legal counsel OR counsel is obtained through contract or other means			
Develop by-laws			
Define committees and write descriptions			
Develop job description for Board of Directors and Officers			
Develop and begin performing board self-evaluations			
Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
Develop a marketing plan			
Enrollment projections, caps, and waiting list/lottery plan established			
Develop appropriate communications materials			

(brochures, newsletters)			
Identify community events at which to market the school			
Identify strategies to recruit a diverse student body (community groups, etc)			
Other			
<b>Learning Program</b>			
Assign an interim board member to make sure Special Education Assurances checklist is fulfilled			
Other			
<b>School Culture</b>			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>November</b>			
<b>Facilities</b>			
Necessary facility inspections initiated and required improvements/timeline established			
Select site, consider expansion potential			
Consider how facility supports curriculum			
Board legal counsel reviews lease and any addendums, etc			
Site is acquired, lease is signed.			
Other			
<b>Financial Management/Business Plan</b>			
Other			
<b>Governance and Management</b>			
Develop a board manual			
Establish separation of duties (start-up coordinator, director, board, staff)			
Define communication methods to school leaders, staff, and community			
Other			
<b>Personnel and Policy Development</b>			
The school board adopts an evaluation process for the Executive Director/Principal			
Hire start-up coordinator (and recruitment coordinator, if applicable)			
Start-up coordinator and/or recruitment coordinator has clearly defined responsibilities and authority (what can be done without			

specific board approval)			
Determine staffing needs			
Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
A systematic plan for relationship development with community organizations that have mission alignment with the school is created			
Database of interested/enrolled students is created and utilized to keep students/families associated with school during enrollment period			
Identify potential partners in the community, develop plan to build relationships			
Other			
<b>Learning Program</b>			
Other			
<b>School Culture</b>			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>December</b>			
<b>Facilities</b>			
Enlist facility design help if needed			
Consult with MDE Specialist re: lease aid			
Other			
<b>Financial Management/Business Plan</b>			
Other			
<b>Governance and Management</b>			
Criminal background checks conducted for each board member			
Other			
<b>Personnel and Policy Development</b>			
Identify strategies to deal with external controversy/internal conflict			
Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
Other			

<b>Learning Program</b>			
Other			
Develop a plan for ensuring that service learning opportunities are embedded in the curriculum			
<b>School Culture</b>			
Develop an intake process for students and families			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>January</b>			
<b>Facilities</b>			
Other			
<b>Financial Management/Business Plan</b>			
Form 990 for non-profit organizations completed and submitted to IRS			
Other			
<b>Governance and Management</b>			
Set date prior to opening for administrative review with ACNW and one or more charter resource groups (MACS, etc.)			
Set date to participate in goal setting exercise with school community, ACNW, and one or more charter resource groups (see above).			
Other			
<b>Personnel and Policy Development</b>			
Applicant pool for School Director position and staff is established by recruiting potential candidates through ads placed in multiple media outlets and referrals from charter/education sources.			
Establish terms of employment, including performance-based, at-will contracts for all employees			
Develop staff policies			
Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
Other			
<b>Learning Program</b>			
Other			
<b>School Culture</b>			

Other			
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Month & Task	Person(s) Responsible	Resources Needed	Date Completed - Progress
<b>February</b>			
<b><i>Facilities</i></b>			
Address building security issues			
Establish insurance policies			
Other			
<b><i>Financial Management/Business Plan</i></b>			
Other			
<b><i>Governance and Management</i></b>			
Other			
<b><i>Personnel and Policy Development</i></b>			
Develop hiring policies and procedures for Director and staff (including plan for hiring teachers and staff that reflect the racial/ethnic/cultural character of the school's identified location)			
Establish terms of employment, including performance-based, at-will contracts for all employees			
Design benefit packages, vacation policies, pension policies, worker compensation, etc.			
Develop staff policies			
Screen and select potential candidates (multiple candidates identified for Director position and interviewed per hiring policies)			
Other			
<b><i>Legal Issues</i></b>			
Other			
<b><i>Community Relations and Marketing</i></b>			
Other			
<b><i>Learning Program</i></b>			
Other			
<b><i>School Culture</i></b>			
Other			

Month & Task	Person(s) Responsible	Resources Needed	Date Completed - Progress
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<b>March</b>			
<b>Facilities</b>			
Other			
<b>Financial Management/Business Plan</b>			
Develop cash flow plan and monitor monthly			
Other			
<b>Governance and Management</b>			
Other			
<b>Personnel and Policy Development</b>			
Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
Other			
<b>Learning Program</b>			
Develop scope and sequence of learning outcomes at each grade level			
Create a matrix of curriculum resource options to make informed decisions			
Other			
<b>School Culture</b>			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>April</b>			
<b>Facilities</b>			
Other			
<b>Financial Management/Business Plan</b>			
Complete MDE budget template			
Monitor Cash Flow			
Other			
<b>Governance and Management</b>			
School Director registered for mandatory MDE director training			
Develop plan for first year board training			
Director attends Title I training at MDE (EMAP training)			
Other			
<b>Personnel and Policy Development</b>			
Establish staff salary range			

Establish staff benefits			
Establish personnel policies/handbook			
School Director is hired and transition process from Start-up Coordinator is established			
School Director hires or continues hiring licensed staff in conjunction with Board of Directors and established hiring policies			
Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
Develop specific plan for parent involvement opportunities			
At least two community partnerships initiated and outlined for ACNW review			
50% of projected enrollment achieved			
Other			
<b>Learning Program</b>			
Other			
<b>School Culture</b>			
Develop a student handbook			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>May</b>			
<b>Facilities</b>			
Secure rates for second term of lease			
Other			
<b>Financial Management/Business Plan</b>			
Monitor Cash Flow			
Identify and purchase financial management software (UFARS compatible)			
PERA is set up with State			
TRA is set up with State			
Establish direct deposit (EFT Authorization) with the Minnesota Department of Finance			
Enrollment projections aligned with appropriate student weighting formulas (including			

free/reduced and special education revenues)			
Other			
<b>Governance and Management</b>			
School Director registered for mandatory MDE director training			
Develop schedule for first year board training			
Director attends Title I training at MDE (NCLB/SERVS training)			
Other			
<b>Personnel and Policy Development</b>			
Establish staff salary range			
Establish staff benefits			
Establish personnel policies/handbook			
School Director is hired and transition process from Start-up Coordinator is established			
School Director hires or continues hiring licensed staff in conjunction with Board of Directors and established hiring policies			
Identify potential vendors for Special Education Director Services and secure services.			
Other			
<b>Legal Issues</b>			
Develop a health and safety policy handbook			
Other			
<b>Community Relations and Marketing</b>			
Develop specific plan for parent involvement opportunities			
At least two community partnerships initiated and outlined for ACNW review			
75% of projected enrollment achieved			
Other			
<b>Learning Program</b>			
Other			
<b>School Culture</b>			
Develop a student handbook			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>June</b>			
<b>Facilities</b>			

Lease aid application submitted to MDE			
Other			
<b>Financial Management/Business Plan</b>			
Monitor Cash Flow			
Approve annual budget and communicate approval to MDE (submit board minutes indicating budget approved)			
Title I application submitted to MDE			
Planning Grant continuation request filed with MDE			
Other			
<b>Governance and Management</b>			
Plan for transition of permanent board			
Transportation plan developed and approved (necessary contracts signed)			
Food service plan developed and approved (necessary contracts signed)			
Other			
<b>Personnel and Policy Development</b>			
Create student and parent handbook/policy manual			
Develop a school calendar			
Acquire medical forms (student and staff)			
75% of staff is hired			
Identify and hire Special Education Teacher(s)			
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			
Create a system for identifying special needs Students (Child Find and FAPE)			
Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
95% of projected enrollment achieved			
Other			
<b>Learning Program</b>			
Purchase curriculum materials			

Identify and plan for any curricular staff development needs			
Develop curriculum based measures to track progress toward academic goals			
Other			
<b>School Culture</b>			
Develop a school disciplinary policy that is compliant with the MN Pupil Fair Dismissal Act			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>July</b>			
<b>Facilities</b>			
Work with Landlord to make necessary repairs/installations			
Arrange for custodian/maintenance services			
Other			
<b>Financial Management/Business Plan</b>			
Purchase technology equipment			
<b>Governance and Management</b>			
District in which charter school is located notified of school's intention to utilize district busing services (if part of approved plan)			
Other			
<b>Personnel and Policy Development</b>			
Staff Development Program designed, approved, and communicated to teachers/staff			
Conduct criminal background/reference checks			
Secure a full set of Board Policies for the operation of a charter school and customize to your school.			
Design discipline policies, code of ethics, and student responsibility code			
Establish enrollment, attendance, transportation, food services, dress code, and harassment policies			
Design teacher evaluation system			
Necessary applications and approval for variances and community expert status acquired			

Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
100% of projected enrollment achieved			
School Vision and Mission are strategically placed throughout the building.			
Other			
<b>Learning Program</b>			
Identify and purchase appropriate standardized assessments			
Purchase Student Planners			
Purchase Teacher Lesson Plan Books (If not incorporated into the SIS system)			
Other			
<b>School Culture</b>			
Other			

<b>Month &amp; Task</b>	<b>Person(s) Responsible</b>	<b>Resources Needed</b>	<b>Date Completed - Progress</b>
<b>August</b>			
<b>Facilities</b>			
Other			
<b>Financial Management/Business Plan</b>			
Monitor Cash Flow			
Other			
<b>Governance and Management</b>			
Other			
<b>Personnel and Policy Development</b>			
Create Personnel Files			
100% of Staff is hired			
Other			
<b>Legal Issues</b>			
Other			
<b>Community Relations and Marketing</b>			
125% of projected enrollment achieved			
110% of registered student have transferred their records from the previous school.			
Conduct Orientation and Open House			
Other			
<b>Learning Program</b>			
Teachers create mapping documents of the entire curriculum and imbed all appropriate MN			

Academic Standards			
School Leadership and teachers create a detailed curriculum plan for at least the first 6 weeks of the school year (Posted for all to see)			
Other			
<b>School Culture</b>			
Staff are trained in all aspects of school operation including discipline policies and student conduct and procedures.			
Other			