

FRIENDS OF EDUCATION
Charter School Start-Up Progress Form/Task List

School: _____

Date: _____

	Task	Person(s) Responsible	Resources Needed	Status	Targeted Completion Date	Actual Completion Date
Facilities						
1	Conduct needs assessment					
2	Identify options					
3	Evaluate/inspect potential sites					
4	Review codes/ordinances/regulations					
5	Obtain resources for financing a facility					
6	Select site, consider expansion potential					
7	Consider how the facility supports the learning program					
8	Acquire site, letter of intent					
9	Enlist facility design help					
10	Consult with Dept of Education regarding lease aid					
11	Address building security issues					
12	Secure renovation financing					
13	Finalize lease					
14	Make necessary repairs/installations					
15	Arrange for custodial/maintenance services, if needed					
16	Establish insurance policies					

Financial Management/Business Plan						
17	Create a comprehensive business plan which includes a 4 year budget projection and 4 year market analysis					
18	Identify potential board members with a financial background					
19	Meet individually with Dept of Education staff members concerning: MARSS, UFARS, EDRS, lease aid, and IDEAS payment system					
20	Establish relationship, open account with					

	Task	Person(s) Responsible	Resources Needed	Status	Targeted Completion Date	Actual Completion Date
	local banking institution					
21	Refine planning grant budget if necessary					
22	Designate financial manager for school					
23	Hire auditor					
24	Establish financial policies prior to receiving revenue (e.g. access to money, identify signature authority, identify approval levels)					
25	Establish separation of duties					
26	Develop internal controls and fiscal policies					
27	Develop and monitor cash flow plan					
28	Acquire forms (purchase orders, etc.)					
29	Schedule monthly board financial review					
30	Identify and purchase financial management software					
31	Identify a team member to provide Friends of Education with monthly financial updates for grant money					
32	Establish line of credit to cover cash flow/holdback shortages					

Governance and Management

33	Ensure that contract with Friends of Education is signed within 45 business days of Dept of Education approval					
34	Review open meeting law					
35	Determine governance structure					
36	Recruit board members with specific expertise (law, finance, real estate)					
37	Develop by-laws					
38	Define committees and write descriptions					
39	Distinguish roles and responsibilities of board					
40	Develop job description for Board of					

	Task	Person(s) Responsible	Resources Needed	Status	Targeted Completion Date	Actual Completion Date
	Directors and Officers					
41	Each board member signs conflict of interest policy					
42	Develop a board manual					
43	Establish a board calendar					
44	Define communication methods to school leaders, staff, and community					
45	Identify legal status, tax-exempt status, MN charitable org, file for 501(c)(3) exemption					
46	Obtain board liability insurance (Directors and Officers)					
47	Perform board self-evaluation					
48	Plan for transition of permanent board					
49	Write and adopt necessary policies					
50	Adopt evaluation process for school leader prior to school opening					

Learning Program

51	Develop scope and sequence of learning results					
52	If implementing core knowledge sequence, meet with Minnesota Humanities Commission					
53	Identify instructional strategies the school will use to achieve academic goals					
54	Develop curriculum-based measures to track progress toward academic goals					
55	Purchase curriculum materials					
56	Identify and plan for any curricular staff development needs					
57	Align instructional plan to Minnesota state standards					
58	Each teacher prepares daily lesson plans for period established by school leader					
59	Purchase appropriate standardized					

	Task	Person(s) Responsible	Resources Needed	Status	Targeted Completion Date	Actual Completion Date
	assessments					

Systems

60	Finance – Perform cost benefit analysis of systems, purchase appropriate system					
61	Student information – Perform cost benefit analysis of systems which possess various sort capabilities (including by demographics, purchase appropriate system					

School Culture

62	Develop a student handbook					
63	Develop a school disciplinary policy that is compliant with the MN Pupil Fair Dismissal Act					
64	Train staff in implementation of discipline policy, student conduct					
65	Develop an intake process for students and families					

Personnel and Policy Development

66	Define responsibility of start-up coordinator (e.g. what can and cannot be done with board approval)					
67	Hire start-up coordinator					
68	Identify recruiting sources					
69	Establish personnel policies/handbook					
70	Create student and parent handbook/policy manual					
71	Determine staffing needs					
72	Develop hiring policies and procedures					
73	Establish terms of employment					
74	Design benefit packages, vacation policies, workers compensation, etc.					
75	Develop employment contracts					

	Task	Person(s) Responsible	Resources Needed	Status	Targeted Completion Date	Actual Completion Date
76	Develop staff policies					
77	Develop job description for school leader; hire school leader					
78	Write/post job descriptions for non-leader positions/ads					
79	Screen and select potential candidates					
80	Conduct background/reference/license checks					
81	Conduct orientation					
82	Create personnel files					
83	Design discipline policies, code of ethics, and student responsibility code					
84	Establish enrollment, attendance, transportation, food services, dress code and harassment policies					
85	Develop a school calendar					
86	Acquire medical forms (students and staff)					
87	Design teacher evaluation system					
88	Design staff development plans for each teacher					

Regulatory Issues

89	Review your state charter school law					
90	Review civil rights/equity issues					
91	Develop a health and safety policy handbook					

Special Education

92	Identify and hire Special Education Director					
93	Identify and hire Special Education Teacher					
94	Assign an interim board member to make sure Special Education Assurances checklist is fulfilled					
95	Identify contractors for supplemental					

	Task	Person(s) Responsible	Resources Needed	Status	Targeted Completion Date	Actual Completion Date
	services (speech, psychologist, etc.)					
96	Identify staff member to learn EDRS to ensure flow of Special Education funding					
97	Identify staff member responsible for Special Education record-keeping procedures and district bill-back					
98	Create a system for identifying special needs students					

Marketing

99	Create a marketing committee					
100	Develop a marketing plan					
101	Identify strategies to deal with external controversy/internal conflict					
102	Develop database of potential students and families					
103	Enrollment to date					
104	Develop appropriate communications materials (brochures, newsletters)					
105	Identify community events at which to market the school					
106	Consider hiring a marketing/enrollment coordinator					
107	Identify and make available parent/community involvement opportunities					
108	Identify strategies to recruit a diverse student body (community groups, etc.)					
109	Identify and implement strategies to avoid burnout					

Accountability

110	Set date, prior to opening, to participate in readiness review					
111	Set date for board to establish goal setting					

	Task	Person(s) Responsible	Resources Needed	Status	Targeted Completion Date	Actual Completion Date
Community Partnerships						
112	Identify potential partners in the community, develop plan to build relationships					

Significant Target Dates

March 1: School Leader Identified

March 1: Facility secured

May 1: Database of interested students/families that is 125% of budgeted enrollment

May 10: Significant renovations/buildout to facility have begun

May 31: 75% of projected budgeted students officially enrolled

June 1: 75% of teaching staff hired

July 1: 125% of projected budgeted students officially enrolled

Where Significant Target Dates not met, the School board will submit a written plan to Friends of Education detailing how the condition will be remedied within 30 days of the Significant Target Date and how the delay will impact the opening of the school.