

The Renaissance Schools Fund - The School Planning Template Back-up Material

Phase 0: INITIAL DESIGN STEPS

- ▶ Assemble initial design team around common vision and theme
 - Complete design team should include school leader (if identified) and additional members with expertise in:
 - Curriculum Development
 - Project Management
 - Proposal writing
 - School Start-up
 - Operations management
 - Urban instructional leadership
 - Facilities/Real estate/Construction management
 - Fundraising
 - Chicago community relations
 - Finance
 - Strategic planning
- ▶ Establish team decision making process
 - Roles, responsibilities and expected time commitment of design team members
 - Communication and information sharing strategy for team
 - High level milestones
 - Draft timeline with deadlines for tasks and responsibilities assigned
 - Decision making/review process
 - Frequency and length of meetings
- ▶ Research best practices in areas such as:
 - Key school structures
 - Effective partnerships
 - Community outreach
 - Education program development
 - Appropriate governance models and recruitment strategies
- ▶ Determine key school structures
 - Mission and vision
 - Grades served (elementary, middle, high school or combination)

- Goals for hours of instructional time on core subjects and instructional days per year
 - Specialized school focus if applicable (math and science focus, technology, performing arts, technology, career preparation, etc.)
 - Objective of the school (graduate students at grade level, get students into private or select high school, 100% college matriculation, career certificate, etc)
 - Academic goals that must be achieved to reach the stated objective (grade level gains each year, state test gains each year, ACT score, career courses or internships, etc.)
 - Key instructional methods/philosophy (project based learning, direct instruction, etc.)
 - Demographic populations you expect to serve
- ▶ Identify potential partnerships needed, including:
- Education organizations and providers
 - Community groups/civic leaders
 - Financial and real estate support organizations (Illinois Facility Fund)
 - Critical funders
 - Corporate sponsors
 - Additional nonprofit or foundation component for school (to provide fundraising or real estate services)
- ▶ Draft 3-5 page Executive Summary (this will evolve over time, but should provide an initial guide to the planning process) that includes:
- Mission statement
 - Educational philosophy
 - Specialized school focus
 - Grades served
 - Anticipated impact of the school
- ▶ Review CPS school application requirements and guidelines for preferred model and submission deadlines
- Prior year’s documents should be reviewed
 - CPS web site will post updates on release of new RFP
 - View successful past proposals at CPS
- ▶ Meet with appropriate CPS officials to discuss:
- Relationship building
 - School design and concept

- Early understanding of requirements and deadlines
- Available technical assistance
- Major donors active in Chicago

- ▶ Understand available funding
 - Check CPS and RSF websites and RFP for information on:
 - CPS start-up funds
 - CPS per pupil funding
 - RSF funds for planning and first 2 years of operations
 - Other major donors

- ▶ Research and visit (4-6) successful national school operators to learn:
 - Best practices and lessons learned in school design and process
 - Resources used to develop proposal
 - Capacity needed to create proposal

- ▶ Determine governance structure
 - Research and make a preliminary determination on the type of school governance structure. The governance will impact the leadership and staff roles of the new school and will be an important component of building a strong, cohesive planning team. Possible governance structures include:
 - Governing Board (Charter and Contract)
 - Alternative Local School Council (Performance Schools)
 - *Note: Charter and Contract schools require a 501c3 and IL non-profit statues to hold a school contract*

- ▶ Identify initial board members (who may or may not be part of the design team) with the following expertise:
 - Education
 - Operations
 - Legal
 - Human Resources
 - Finance
 - Real Estate/Facilities/Construction Management

- ▶ Develop and file Articles of Incorporation, By-laws, and IRS 501c3
 - Review documents of successful and/or similar school models
 - Review guidelines and regulations
 - Check for potential conflict of interest
 - Seek legal council

Phase 0: EARLY COMMUNITY OUTREACH

- ▶ Determine initial target community or communities
 - Use data to evaluate and ensure fit between the target community and your school design capabilities (performance data of neighborhood schools, number of available seats in community, demographic trends in community, facility availability, community needs and assets, potential partnerships within neighborhood, etc.)
 - Adjust community focus, add team capabilities or revise design as appropriate

- ▶ Evaluate political landscape
 - History of neighborhood with Ren10 schools
 - Openness to proposed school type or design

- ▶ Research and contact existing resources in community
 - Faith-based organizations
 - Community based organizations
 - Neighborhood groups
 - Local retailers
 - Health clinics
 - Private sector organizations
 - Key political leaders (alderman, state legislatures, etc.)
 - Community newspapers
 - *Note: The extent of groups in a community can be overwhelming. It is important to first establish strong relationships with a few key leaders who can provide an overview, help set priorities, and provide an entrée to other key groups*

- ▶ Identify and visit (4-6) local and national schools serving similar populations
 - Best practice trips to observe schools successfully serving a similar population
 - Visits should also be done to see schools serving a similar population without positive results to learn from their mistakes

Phase 1: DESIGNING A SCHOOL

I. Governance/Board Development

- ▶ Define roles and responsibilities of the Board/ALSC
 - Operating procedures
 - Authority of Board/ALSC
 - Term limits
 - Potential fundraising requirements
 - By-laws finalized

- ▶ Recruit Board/ALSC members
 - Start-up Boards/ALSC's are often smaller and may include 7-10 members
 - Draft one pager on school vision and board roles to use in outreach
 - Design preferred board make-up and rubric to evaluate prospects
 - Leverage each recruited Board member to nominate/recruit additional members as needed

- ▶ Establish and appoint Board Chair and members to appropriate committees
 - Committees depend on the size, skill set of the Board/ALSC and tasks needing to be completed, but could include:
 - Finance
 - Real Estate
 - Education Plan
 - Leadership and Governance
 - Fundraising

- ▶ Conduct governance orientation
 - Workshops, conferences, and sessions to train new board members

- ▶ Determine skills and experiences needed in additional Board/ALSC members to ensure all expertise are covered
 - Education
 - Operations
 - Legal
 - Human Resources
 - Finance
 - Real Estate/Facilities/Construction Management

- ▶ Develop process for adding new Board/ALSC members

- Identification, recruitment, screening, and selecting of additional Board members to fill all required skills and experiences
- ▶ Develop transition plan to formal Board/ALSC once approved
 - Roles of design team members on board (if needed)

II. Leadership Development

- ▶ Determine school leadership structure
 - Draft organizational chart for school reflecting lines of authority and reporting responsibilities including Board/ALSC, principal and all other staff
- ▶ Develop process to hire school leader
 - Identification of key skills, qualifications and experiences required
 - Initial job description and draft employment contract
 - Process for identifying, recruiting, screening and selecting leader
 - Timeline for identifying and hiring school leader
 - Target sources (CPS, Idealist.org, Teach For America, INCS, Doostang, DePaul University, Career Builder, Monsters, newspapers, New Leaders for New Schools, LAUNCH, University of Illinois, etc.)
- ▶ Execute school leadership hiring process
 - Announce position through target sources and using strategies stated in application with application deadline
 - Screen applicants and notify all applicants of status within 10 days of receipt of application
 - Interview potential candidates
 - If possible, observe leader candidate in current school environment
 - Conduct background and reference check
 - Secure board approval of potential candidate
- ▶ Determine leadership development opportunities
 - If applicable, leader participates in year-long leadership development training program (NLNS, Building Excellent Schools, etc.)
 - Workshops, conferences, etc. for school leader to attend
 - Internships at a new school/start-up
- ▶ Develop job descriptions for other leadership positions (business manager, assistant principal and lead teacher)

- Identification of key skills, qualifications and experiences required
 - Initial job description and draft employment contract
 - Process for identification, recruitment, screening and selecting leader
 - Timeline for identifying and hiring school leader
 - Target sources (CPS, Idealist.org, Teach For America, INCS, Universities, Career Builder, Monsters, newspapers)
- ▶ Execute hiring process for additional leadership positions
- Announce position through target sources and using strategies stated in application with application deadline
 - Screen applicants and notify all applicants of status within 10 days of receipt of application
 - Interview potential candidates
 - Conduct background and reference check if possible
 - Secure board approval of potential candidate

III. Accountability and Academic Targets

- ▶ Create educational performance goals
- Outcome measures should include both standard metrics and goals unique to your mission statement
 - Standard goals include:
 - % of students that meet or exceed standards on ISAT or PSAE
 - Average Daily Attendance Rate
 - Graduation Rates
 - Unique goals examples include:
 - % of students that exceed standards on ISAT or PSAE
 - % of students accepted to 4-Year College
 - % of students attending Selective Enrollment High Schools
 - # of independent books read by students
 - For each performance goal, an expected level of achievement should be set for each year of your school's five year performance agreement
 - Clearly defined metrics to assess progress towards a goal are required
 - Analysis of comparable school performance (district, charter, and schools from the community you are proposing) should be used as a relative benchmark for your school's first year performance on standard performance measures
 - An example educational goal template can be found on the following page

Educational Goal Sample Template							
Goal	Metric	Grades	2010	2011	2012	2013	2014
Reading - % Meet or Exceed	ISAT	3 – 8					
Math - % Meet or Exceed	ISAT	3 – 8					
Science - % Meet or Exceed	ISAT	3 – 8					
Composite - % Meet or Exceed	ISAT	3 – 8					
Attendance Rates	Average Daily Attendance	All					
Graduation Rate	5 – Year Cohort Graduation Rate	High School					
Unique Educational Goal							

- ▶ Create operational and management performance goals
 - Operational and Management goals should address all non-academic aspects of a school’s operations such as
 - Financial Management and Budgeting
 - Operations
 - Human Resources
 - Community Outreach
 - For each goal, an expected level of performance should be set for each year of your school’s five year performance agreement
 - Clearly defined metrics to assess progress towards a goal are required
 - An example operational and management goal template can be found on the following page

Operational and Management Goal Sample Template							
Goal	Area	Metric	2010	2011	2012	2013	2014
Maintain a balanced budget	Finance	Audited Financial Statements					
No material weaknesses in internal financial controls and reporting	Finance	Audit Report					
No material weaknesses in compliance practices	Operations	ONS – Compliance Report					
% of teachers retained from prior year	Human Resource	Signed Teacher Contracts					
Teacher Satisfaction Rating	Human Resource	Teacher Survey					
Parental Involvement	Community Outreach	# Parent – Teacher Interactions					
Community Involvement	Community Outreach	# Community Events					
Student Demand	Community Outreach	# Applicants per Available Seats					
Parental Satisfaction Rating	Community Outreach	Parental Survey					
Unique Operational Goal							

IV. Assessment Plan

- ▶ Determine priorities regarding how student performance data will be used to drive instruction
 - Identify formal, mandated assessments (ISAT, PSAE)
 - Identify interim assessments to be administered (internally-created, purchased, or Learning First)
- ▶ Create process to analyze student results
 - Framework to review results and facilitate teacher/leader conversations around data analysis

- School-wide, grade level, and individual classroom goals based on data results
- Process to modify instructional strategies based on interim assessment results
- ▶ Develop external and internal assessment schedules/timing based on needs of the timing and purpose of results analysis
 - Scheduling of administration of tests
 - Allocation of time for results analysis by staff

V. Educational Program Development

- ▶ Plan for low-performing and gifted students
 - Gain understanding of potential needs of students based on available comparable school data and discussions with other Ren10 schools in similar communities
 - Design data-driven process to identify and assess low performing and gifted students
 - Process should identify needs and ability levels of individual students to better tailor support
 - Process should include both incoming student diagnosis prior to school launch and on-going progress assessment to allow for student movement into, and out of, remediation and accelerated learning supports
- Determine appropriate remediation and accelerated learning supports, both in and out of the classroom, for each student population. Potential examples include:
 - Skills-based classes
 - Individual or small group tutoring
 - Software intervention programs
 - Differentiated instructional approaches
 - Credit Recovery / Advancement Programs
- Identify structures and resources required provide additional support. Potential examples include:
 - Scheduling (semester vs. trimester, block vs. regular period)
 - Length of school day / school year
 - School organizational models (e.g., house and tracking systems)
 - Interim Assessment
 - Additional staff members
 - Staff professional development

- ▶ Plan school day structure and annual calendar
 - Consider:
 - Instructional minutes for core subjects
 - Total instructional time in comparison to best practices
 - Length of school day for students and teachers
 - Block scheduling
 - Additional time allocated for tutoring or extra-curricular
 - Time for professional development
 - Time for teacher collaboration
 - Summer school/Saturday school
 - School calendar (traditional, year-round, early start, etc.)
 - Teacher/student induction
 - Set time goals for each category
 - Build weekly schedule with courses, breaks, teacher times clearly identified

- ▶ Select curriculum with careful consideration for:
 - Needs of targeted community
 - Curriculum used by schools serving similar populations
 - Historical results of curriculum
 - Selection of textbooks, instructional materials and software for all expected levels of student performance
 - Unique needs for specific school theme or goals
 - Scope and sequence incorporating expected needs of incoming students
 - Appropriate time to develop curriculum (in each subject with person/position responsible for development)

- ▶ Before- and after- schools programs and extracurricular options
 - Clubs
 - Athletics
 - Community service
 - Dance team
 - Martial arts
 - Saturday academy
 - Tutoring/Homework help
 - Career exploration
 - Etc.

- ▶ Determine instructional staffing needs based on factors including:
 - Planned educational program

- Qualifications and experience desired
 - Professional development and supports school will provide
 - Budget
 - Expected remediation and accelerated learning needs
- ▶ Write a draft of the education program description
- Curriculum and course scope and sequence
 - Remediation plan
 - School Culture and Climate
 - School Calendar/Schedule
 - Performance Assessments
 - Professional Development
 - Specialized Populations

VI. Professional Development

- ▶ Determine induction program or structure
- Induction trainings should be based on anticipated composition and skill sets of new staff and proposed instructional requirements and include topics such as:
 - Explicit school culture
 - School-wide systems and procedures
 - Review of academic goals and expectations
 - Curriculum and instructional practices (including differentiated instruction)
 - School specific design trainings (arts infusion, career prep, etc.)
 - Special Education/IEP training
 - Model teaching and sharing expectations
 - Timing of induction including how many days, full-time/part-time, how far in advance of school start
- ▶ Determine resources needed for induction
- Internal/external providers for sessions
 - Materials needed
 - Facility
- ▶ Develop professional development schedule for first school year
- Time allocated for curriculum specific training throughout the year
 - Time allocated throughout school year to analyze interim assessment results, determine remediation needs and plan for re-teaching

- Internal/external providers
- Person responsible for organizing professional development and delivery of internal presentations
- Key partners
- Time allocated weekly for grade level or department level collaboration
- Process for identifying on-going professional development needs through interim assessment data and staff evaluations
- Process to evaluate effectiveness and impact of professional development

VII. Specialized Populations

- ▶ Create a process to identify students with special needs including: special education, English Language Learners, students with social and emotional needs, and homeless students
 - Data-driven process to identify students with specialized needs prior to opening and throughout the year
- ▶ Develop a framework to address needs of each specialized population
 - Consideration of course scope and sequence, daily schedule, staffing plan and available student supports for each of group (special education students, English Language Learners, students with social and emotional needs and homeless students)
 - Staff and external resources required to meet these needs
 - Planned links to external service providers

VIII. Technology Plan

- ▶ Research Student Information Systems (SIS)
 - SIS should track attendance as well as any other required data and must meet CPS requirements
 - Performance schools should become familiar with capabilities of CPS system and consider work arounds for any gaps between desired and provided capabilities
- ▶ Develop a three to five year technology plan
 - Plan should reflect instructional and administrative technology needs
 - Plan should include one PC for every staff member and one computer for every two to five students
 - Plan should include wiring, server, technical support and software
 -

- Unique technology requirements based on instructional needs of school design

IX. Facilities and Location

- ▶ Determine facility space and usage requirements and identify potential sites (CPS buildings or independent) that are near target community
 - This year, applicants competing for CPS sites must select one of four priority communities provided. Actual sites will not be identified until after school approval.

If pursuing a CPS facility:

- ▶ Develop a space usage plan after initial walk-through
 - Space usage plan should be based on school design, size, focus, etc. and include number of classrooms needed, common areas, recreational space, restrooms, community facility or other needs
 - Special consideration should be given to shared facilities, especially regarding common space, shared resources (gym), flow of students, and security

If pursuing an independent facility:

- ▶ Develop necessary team skills and resources to obtain a facility
 - Expertise needed on team to acquire an independent facility include:
 - Realtor
 - Financial consultant
 - Architect
 - Lawyer
- ▶ Determine target mortgage/lease payments based on operating budget*
 - School should target lease/mortgage payments to be approximately 15% of total operating budget
 - Use this estimate to back into the appropriate loan amount for the school
- ▶ Draft financing plan
 - Total cost for facility (purchase or lease and additional improvement costs)
 - Financing (available funding or financing mechanisms)
 - Project description, plans, project budget, and documentation of sources and uses

- ▶ Identify potential sites
 - Considerations when identifying potential sites include:
 - Target community
 - Planned enrollment and grade levels
 - Square footage needed
 - Building specific needs for school design
 - Real estate availability
 - Cost
 - Time required for renovations
 - Potential zoning or acquisition issues
- ▶ Develop space usage plan
 - Space usage plan should be based on school design, size, focus, etc. and include number of classrooms needed, common areas, recreational space, restrooms, community facility or other needs
- ▶ Conduct preliminary architectural review and assessment of facility/property
 - Cost estimates for school specific improvements, code-mandated updates and ADA compliance
- ▶ Detail rehabilitation work
 - Scope of work to be completed
 - Timeline for any necessary renovations
 - Completed Sources and Uses of Funds for Facility Development form (www.ren2010.cps.k12.il.us) and planned funding mechanism to cover costs

All Design Teams:

- ▶ Develop facilities plan narrative for inclusion in school application
 - Narrative should include:
 - Address and neighborhood
 - Facility description (size and structure, number of classrooms, etc.)
 - Space usage plan
 - Improvements or code compliance needed
 - Scope of improvements and estimated cost
 - Back-up facility plan

IX. Community Outreach & TAC Process

- ▶ Identify and meet with critical stakeholders in the community
 - Faith-based organizations
 - Community based organizations
 - Neighborhood groups
 - Local retailers
 - Health clinics
 - Private sector organizations
 - Key political leaders (alderman, state legislatures, etc.)
 - Community newspapers
 - *Note: The extent of groups in a community can be overwhelming. It is important to first establish strong relationships with a few key leaders who can provide an overview, help set priorities, and provide an entrée to other key groups*

- ▶ Solicit community input in school design
 - Engagement of community members in school design can be accomplished by advertising in newspaper for community input or setting up a table in a busy area (laundromat, grocery store, etc.) to talk to local residents and receive feedback
 - It is important, however, for the school leader to have a vision for the school, know the non-negotiable, and lead the process

- ▶ Secure key political support
 - Discussion with Local Alderman; show them the outreach plan and solicit advice on other groups to reach out to
 - Discussion with State Representatives and Senators

- ▶ Identify role C-TAC can play in community outreach
 - C-TAC members can play a role in community outreach by identifying:
 - Community leaders and stakeholders
 - Assets and resources within the community
 - Potential feeder schools
 - Advertisement options in community

X. Staffing

- ▶ Determine overall staffing requirements based on school design
 - Leadership team: principal, assistant principal, business manager, other
 - Teaching staff: lead teachers, grade level teachers, specialists, special education teachers and teachers of non-core subjects (art, music, P.E., etc.)

- Student support staff; counselors, case managers, etc.
- Non-instructional staff: custodians, security, clerk, cafeteria employees, etc.
- ▶ Develop job descriptions for all instructional and non-instructional positions
 - Identification of key skills, qualifications and experiences for each position
 - Job description for position
 - Process for recruitment, identification, screening and selection of position
- ▶ Develop faculty and non-instructional staff recruiting strategy and timeline
 - Staff recruiting strategy should include:
 - Outreach and advertising that will be done
 - Institutions that will be contacted
 - Review process for candidates
 - Final decision making process
 - Recruiting strategy should be included in the school application and identify who is responsible for the process

XI. Operations, Financial Planning and Fundraising

- ▶ Develop operations organizational chart

Service	Planned Provider or Provider Type	School Staff Member Responsible	Timeline for Securing Service	Estimated Costs
Accounting and Bookkeeping				
Auditing				
Custodial/ Maintenance				
Food Service				
Healthcare				
Insurance				
Payroll				
Security				
Transportation				
Other:				

- ▶ Prepare staffing chart considering the following
 - Necessary administrative and non-instructional positions within school
 -

- Some positions should be provided in-house and others can be more effectively contracted out
- Agree upon lines of reporting and levels of responsibility and relationship
 - Employee benefits, assumptions and costs (Insurance, Retirement, etc.)
 - Costs based on staffing chart to be included in summary budget
 - Salary levels, incentive plans, and expected distribution of each
- ▶ Prepare necessary budgets
 - First year operating budget is needed for Design Framework
- ▶ Plan 5 year fundraising plan (although 5 year budgets are not needed until Full Proposal submission)
 - Fundraising projections for start-up and years 1-5
 - Fundraising strategy to support projected needs
 - Resources and responsibilities for fundraising
 - Likely donors, expected awards and timing
- ▶ Prioritize school spending in internal document
 - Non-negotiables required for model's success
 - Impact on programs/model if projected fundraising goals are not met
 - Additional programs and positions in case more revenue is committed or other adjustments to the budget are made
- ▶ Appoint design team member or board member to oversee financial responsibilities
 - Responsibilities include:
 - Managing, administering, accounting for and reporting on initial grant funds, other revenues, and disbursements until application is approved
- ▶ Create financial management plan upon approval
 - Budgeting, financial management, system controls and accounting needs for school after approval
 - Plan should specify whether positions will be met by in house staff or contracted out

XII. Student Recruitment and Admissions

- ▶ Determine targeted grade levels and seats per year

- Initial enrollment (number of students, grades)
- Annual growth plan (number of students, grades)
- Enrollment at capacity (number of students, grades)

- ▶ Determine enrollment model
 - Citywide enrollment is open to all students within the City of Chicago, most have targeted recruitment in their immediate community
 - Overlay Boundary Lottery provides families a choice of several options within an expanded neighborhood boundary
 - Overlay and Citywide Boundary lets schools reserve a share of seats for students from an expanded neighborhood boundary, allocating the remainder of seats to city-wide applicants
 - Traditional Boundary assigns students to the neighborhood school

- ▶ Develop action plan and timetable for student recruiting
 - Timeline should include:
 - Recruiting timeline (beginning immediately after approval)
 - Application deadline
 - Lottery date
 - Date for parent notification (no later than May 15th)
 - Action plan should include:
 - Specific recruitment pathways (schools, community groups, etc.)
 - Neighborhood events to attend
 - Mailings
 - Number and timing of hosted events

- ▶ Develop simple application form and more detailed enrollment package
 - Sample of application forms and enrollment packages should be obtained from similar schools
 - Enrollment package should include:
 - Residency verification
 - Home language survey
 - Parent authorization for student records transfer
 - Health and medical forms
 - Transportation needs survey
 - Applications for before and after-school programs
 - Free and reduced price eligibility
 - Parent information sheet

- ▶ Develop preliminary family/student focused school marketing materials and brochures
 - Materials should include:
 - One-page summary of school design and features
 - Q&A sheet
 - Application form

XIII. Food Service Program

- ▶ Determine standards and policies for food program
 - Factors to consider include nutritional standards, whether meals will be subsidized or fees charged, etc.
 - Consider CPS offerings/requirements (especially for performance schools)

Phase II: REFINING THE PROPOSAL

I. Governance/Board Development

- ▶ Recruit additional Board/ALSC members to fill missing expertise
 - Education
 - Operations
 - Legal
 - Human Resources
 - Finance
 - Real Estate/Facilities/Construction Management
- ▶ Approve additional Board/ALSC members
 - Prospective Board/ALSC members should be interviewed by committee of founding board members to determine qualifications, commitment to school and mission, and time available for Board/ALSC duties
 - Recommendations made to founding Board/ALSC for approval

II. Leadership Identification or Development

- ▶ Execute school leadership hiring process
 - Announcement of position through target sources and using strategies stated in application with application deadline
 - Screen applicants and notify all applicants of status within 10 days of receipt of application
 - Interviews with potential candidates
 - Background and reference check
 - Board approval of potential candidate
- ▶ Execute hiring process for additional leadership positions
 - Announcement of position through target sources and using strategies stated in application with application deadline
 - Screen applicants and notify all applicants of status within 10 days of receipt of application
 - Interviews with potential candidates
 - Background and reference check
 - Board approval of potential candidate

IV. Assessment Plan

- ▶ Revise or redefine plans for gathering baseline data from incoming students
 - Data should be collected from previous school
 - Plans made to administer baseline test upon admission
- ▶ Clarify the implementation of assessment and data driven instruction plan
 - How data will be gathered, analyzed, disseminated, and used to inform or adjust instruction
 - How and when conversations will occur between leaders and teachers about the results
 - How data will influence intervention strategies and future curriculum development
 - Position responsible for data management

V. Education Plan

- ▶ Revisit curriculum identification process based on additional information about student needs and Design Framework feedback, and consider:
 - Needs of targeted community
 - Curriculum used by schools serving similar populations
 - Historical results of curriculum
 - Selection of textbooks, instructional materials and software for all expected levels of student performance
 - Unique needs for specific school theme or goals
 - Scope and sequence incorporating expected needs of incoming students
- ▶ Create curriculum development timeline
 - Timeline should span from November to July and outline clear plans to develop each subject and identify who is responsible for each component
- ▶ Refine remediation plan
 - Incorporation of expert feedback from design framework
 - Additional structure to clearly explain how stated services will be provided
 - Clarification of time allocated, resources provided and curriculum offered to meet the additional needs of low performing and gifted students

VI. Professional Development

- ▶ Create structure for teacher collaboration
 - Process for teacher collaboration time

- Mentoring program for new teachers
- Peer teach observations

VIII. Technology

- ▶ Finalize basic instructional and operational technology plan, including determining if school is eligible for e-rate discount program
 - If school is e-rate eligible, potential contractors for developing e-rate application (including comprehensive technology plan) should be identified before Full Proposal submission

IX. Facilities and Location

- ▶ Perform due diligence on facility
 - Inspections (fire code, health and safety, ADA, asbestos, lead paint, contamination)
 - Appraisal
 - Zoning check
 - Hire architect to do inspection
 - Conduct other inspections (if applicable)- fire code, health, etc.
- ▶ Update financing plan
 - Total cost for facility (purchase or lease and additional improvement costs)
 - Adjust based on feedback from architect report
 - Financing (available funding or financing mechanisms)
 - Project description, plans, project budget, and documentation of sources and uses

X. Community Outreach

- ▶ Participate in community meetings
 - Schools applying to CPS facilities should regularly attend TAC meetings
 - Founding team should host forums, dinners, or other events in the community
- ▶ Continue to meet with key critical stakeholders in community
 - Faith-based organizations
 - Local community development organizations
 - Neighborhood groups

- Local retailers
- Health clinics
- Private sector organizations
- Community newspapers

XI. Staffing

- ▶ Continue informal recruiting of faculty and staff
 - Teaching staff: lead teachers, grade level teachers, special education teachers and teachers of non-core subjects (art, music, P.E., etc.)
 - Non-instructional staff: custodians, security, clerk, cafeteria employees, etc.

XII. Operations, Financial Planning and Fundraising

- ▶ Prepare additional budgets required for CET
 - Five year operating budget assumptions
 - Grants
 - Start-up budget
 - Cash Flow budget
 - Five year operating budget
- ▶ Determine system for internal financial controls
 - Explanation of the financial systems and monitoring processes that will be used
 - Reports that will be generated and the frequency
 - Person responsible for managing the reports
 - Fiscal review process for the school

XIII. Student Recruitment and Admissions

- ▶ Finalize application and enrollment plan
 - Sample of application forms and enrollment packages should be obtained from similar schools
 - Enrollment package should include:
 - Residency verification
 - Home language survey
 - Parent authorization for student records transfer
 - Health and medical forms
 - Transportation needs survey

- Applications for before and after-school programs
 - Free and reduced price eligibility
 - Parent information sheet
- ▶ Complete/finalize student registration forms and kit
- Registration package should include:
 - Residency verification
 - Home language survey
 - Parent authorization for student records transfer
 - Health and medical forms
 - Transportation needs survey
 - Applications for before and after-school programs
 - Free and reduced price eligibility
 - Parent information sheet

Phase III: IMPLEMENTING THE SCHOOL DESIGN

I. Governance/Board Development

- ▶ Finalize and distribute Board/ALSC manual to all current and new members
 - Manual should include:
 - Roles and responsibilities
 - Expectations (attendance and fundraising)
 - Information regarding key school policies and procedures
- ▶ Schedule periodic Board/ALSC training and/or self-evaluations
 - Initial training preceding opening of school
 - Ongoing training at least once a year
 - Annual evaluation (after receipt of performance data for prior school year)
- ▶ Establish advisory teams to share leadership and inform the Board/ALSC
 - Consistent with the school application, establish one or more of the following:
 - Parent Advisory Council
 - School Planning and Management Team
 - Student and Staff Support Team
 - Faculty Advisory Team

III. Accountability Plan

- ▶ Refine initial accountability plan
 - Changes based on conditions of approval or baseline data after student enrollment
 - Final accountability plan will be confirmed after one year of operation and once baseline performance data for the school is available
- ▶ Review internally the contract provided by CPS (Board, legal counsel, etc.)
 - Enrollment model and exhibits should be reviewed closely before signing contract

V. Education Plan

Principal or head of school assumes responsibility for finalizing development and implementation of educational program and preparing initial faculty and staff for school opening.

- ▶ Review and update implementation plan for all components of school design and educational program
 - Leaders distribute ownership of each component
- ▶ Make adjustments to school design based on assessment of enrolled students
 - Data for enrolled students should be sought and obtained by June 1st
 - Adjustments can be made to school calendar, teacher and student schedules, school programming, faculty training, and school staffing based on information regarding enrolled students

V. Professional Development

- ▶ Plan timetable for implementing teacher leadership training
 - Identification of potential teachers qualified for leadership opportunities
 - Opportunities for professional development or additional responsibilities to train teachers made available
- ▶ Plan structure and schedule for teacher meetings
 - Meetings should be done by grade, subject area, or department
 - Structure for evaluating curriculum, assessment results, and student progress should be imbedded in teacher meetings
 - Frequency and duration for meetings, collaboration and staff development should be established
- ▶ Create the protocol for ongoing professional development throughout the year
 - Training should be pre-arranged for some topics and left open for others to address needs identified by principal or faculty through the year
 - Identification of person responsible for all planned professional development (internal or external providers)
- ▶ Develop observation and evaluation forms
 - Teacher observations/evaluations
 - Peer observations
- ▶ Schedule Student Information System training for staff
 - Schedule dates with provider (CPS or vendor in conjunction with procurements)
 - Training completed by June 15th so all student records and information can be put into system

VII. Special Education

- ▶ Establish multidisciplinary team if SPED services not fully provided by CPS
 - Team should include social worker, school psychologist, speech and language therapist, clinical psychologist
- ▶ Arrange appropriate SPED service delivery
 - Appropriate SPED service delivery can be contracted out to an outside provider, agreed upon with CPS or hired within

IX. Facilities and Location

Some schools may operate in CPS facilities with CPS performing necessary improvements. Other schools may have to procure their own facilities. Activities required will vary depending on the situation.

- ▶ Secure facility
 - External support can be provided by Illinois Facility Fund
 - If facility is not secured upon approval, establish a clear facility identification plan and agree upon a deadline for securing a facility (delay opening for a year if facility is not identified by the set date)
 - Independent facility can be secured through an executed use agreement, lease agreement, lease with purchase option agreement, purchase or sales agreement, or other legally binding document
 - CPS facility should be confirmed in board report or experienced project manager should work with CPS to identify site
- ▶ Establish clear responsibility for facility project management
 - Responsibilities should be managed by a fulltime project manager on staff or contracted out to proven professional
 - If the school is using an independent facility the responsibilities include:
 - Facility acquisition
 - Facility development and renovations
 - If the school is using a CPS facility the responsibilities include:
 - Coordination with CPS
 - Oversight of renovations required

If pursuing an independent facility:

- ▶ Finalize financing
 - Facilities project manager will determine:
 -

- Total cost for facility (purchase or lease and additional improvement costs)
- Financing (available funding or financing mechanisms)
- Project description, plans, project budget, and documentation of sources and uses

For everyone:

- ▶ Complete construction
 - Initiation of work order changes on timely basis
 - Punch list created 90 days before construction is completed
- ▶ Move in furniture and arrange common spaces
 - Includes offices, library-media center, computer labs, multi-purpose room, etc.
- ▶ Develop facility sharing agreement (if in shared building)
 - School leadership and campus manager in the facility should work together on cafeteria, gymnasium and other common space policies and plans
 - Special attention should be given to school safety responsibilities in a shared facility

X. Community Outreach

- ▶ Identify community members or parents to serve on school Board/ALSC or other advisory councils (if indicated in school application)
 - Information about governing board (ALSC), election/selection dates and responsibilities distributed to parents during registration
 - Election/selection should take place in the first month of school
 - Member(s) should be added to the board by November 1st

XI. Staffing

- ▶ Complete all faculty and staff hiring
 - Teaching staff: lead teachers, grade level teachers, special education teachers and teachers of non-core subjects (art, music, P.E., etc.)
 - Non-instructional staff: custodians, security, clerk, cafeteria employees, etc.
- ▶ Assess additional faculty/staff needs

- Based on needs of initially enrolled student population, determine if additional staff or faculty are needed and adjust school budget to cover the costs of the additional positions

XII. Operations, Financial Planning and Fundraising

- ▶ Determine process and responsibility for managing school revenue and expenses
 - Initial grants, donations and other revenue must be accounted for, reported on and disbursed
- ▶ Hire individuals charged with financial management and reporting duties
 - Financial management and reporting should be managed by CFO, business manager and accountants
- ▶ Finalize financial management policies
 - School application should include policy drafts to build upon
 - Internal controls should include appropriate restricted and unrestricted fund segregation
- ▶ Identify and procure financial management software
 - Software will be used for generating monthly financial reports and all other reports required by law, state, local and federal agencies, grantors, etc.
- ▶ Arrange payroll system
 - Payroll system can be arranged with CPS, established internally or contracted out

XIII. Student Recruitment and Admissions

- ▶ Launch student recruitment campaign including:
 - Advertisements
 - Literature to be distributed in neighborhood
 - Direct mailings
 - Attending neighborhood events
 - Any other strategies mentioned in school proposal
 - Application process
 - Frequently asked questions
- ▶ Conduct lottery and establish waitlist (if applicable)

- Final date during school year for enrolling students off the waitlist should be determined
- ▶ Register students and administer baseline performance assessments
 - Registration can be done at school site, by phone, or electronically
 - Performance assessments can be scheduled for student orientation or the first week of school
- ▶ Schedule one or more parent and student orientation sessions prior to school opening
 - Parents should be notified of orientation sessions upon registering for school
 - Orientations should be held in mid to late August if school starts after labor day
 - Several orientation sessions should be offered so parents and students can all attend
- ▶ Provide appropriate information to parents during registration
 - School calendar, dress code, graduation requirements, school code of conduct, orientation dates, school contract (to be signed by parents, student and school leader), etc.
- ▶ Request transfer of student records from previous schools as students enroll
 - Transfers must be made prior to summer vacation

XIV. Extracurricular Programs and Student Activities

- ▶ Develop extended day activities plan for students
 - Extended day activities can be developed and organized by school staff or contracted out
- ▶ Develop schedule for creating extracurricular programs and activities
 - Extra-curricular activities may include:
 - Student newspaper
 - Athletic teams
 - Debate teams
 - Band
 - Honor Society
 - Academic clubs

- ▶ Determine responsibilities for extra-curricular activities
 - Faculty, staff, parents and community groups can lead extra-curricular activities

XV. Procurement

- ▶ Order and manage delivery of instructional materials
 - Deliveries should include textbooks, training materials, software, classroom supplies, library collection, etc
 - Deliveries should be made to accessible location where the materials can be stored (if the school is under construction it might not be a good place to send materials)
- ▶ Order and manage delivery of classroom furniture, equipment and technology
 - Delivery should be targeted for right after receipt of Certificate of Occupancy (unless school has designated storage area off site)
- ▶ Order and manage delivery of capitalized assets, including kitchen equipment, playground equipment, buses, vans, etc.
 - Facility project manager can oversee these items
 - Delivery should be targeted for right after receipt of Certificate of Occupancy (unless school has designated storage area off site)
- ▶ Order and manage delivery of computers and other technology
 - Delivery should be targeted for right after receipt of Certificate of Occupancy (unless school has designated storage area off site)

XVI. Food Service

- ▶ Distribute forms to determine eligibility for USDA Free/Reduced Price Meals Program
 - Budget for Free/Reduced Meals Program can be revised and staffing determined based on student eligibility
- ▶ Negotiate contract with CPS or another food service provider
 - If there is a working kitchen, an in-house food program is also possible, which includes kitchen management and a procurement system

XVII. Health and Safety

- ▶ Acquire student health forms
 - Health forms should include most recent physical exam, TB tests, and immunization records
 - All records should be checked for completeness and follow-ups should be done as necessary
- ▶ Hire or contract-out for appropriate medical personnel
 - Potential providers should be identified
 - Medical personnel include nurse and EMT's for athletic events
- ▶ Develop system to administer medication to students
 - Procedures for administering medication in place
 - Storage repository for student medication is identified
- ▶ Ensure rules and code of conduct protect the safety of all students and staff
 - Staff, parents and students should be clear about the behavioral requirements, suspension and expulsion policies, and prohibition of all weapons
 - Code of conduct should be distributed to faculty during training, to parents during orientation, and reinforced during the first week of school

XX. Reporting and Compliance

- ▶ Finalize key CPS documents and agreements
 - Conditions for approval
 - Board report
 - Contract (paying special attention to enrollment plans and key autonomies)
 - ALSC approval process (Performance Schools only)

Phase III: COMMUNICATIONS, MESSAGING, & DRAFTING APPLICATION

- ▶ Determine primary spokespeople for school and areas of focus
 - Generally the chair of the board and principal speak on behalf of the school once the school opens
- ▶ Finalize marketing materials
 - Materials should include:
 - Opening date
 - Grades served and spots available



- School leader information
- School location
- School type and focus
- Application process
- Frequently Asked Questions