

## HOW TO USE THE SCHOOL PLANNING TEMPLATE

Starting a new school is a time consuming and complex undertaking – and ultimately a very rewarding experience.

The Renaissance School Fund (RSF) has created this School Planning Template to assist new school developers in understanding, and therefore planning for, many of the activities that are involved with creating a new school.

The School Planning Template is broken out into four parts:

- Concept Development:** Concept Development includes the process of assembling a design team and creating a school vision. These steps should begin at least 2½ years before the planned opening date of a new school.
- Designing A School:** Designing a school should begin at least 2 years before a new school opens; it continues through submission of a design framework. During this phase, the planned new school should largely take shape – in the form of a draft school application and preliminary financial projections.
- Refining the Proposal:** Once the design framework is submitted, new school developers will participate in interviews, receive feedback and create a comprehensive school application. During this period, new school developers add greater detail to their design, make adjustments based on Design Framework feedback, increase their community outreach efforts, and finalize a comprehensive school application. Primary focus is on the organizational, educational, operational, or financial components of the proposed school.
- Implementing the School Design:** Approval of a school application is only the first step in meeting the challenge of making the vision of a new high quality school a reality. During the 10 month implementation period, the plan for a new school is managed and executed.

## HOW TO USE THE SCHOOL PLANNING TEMPLATE

The School Planning Template is not intended to be all inclusive. It does contain many of the key planning and implementation activities for a new school, but keep in mind that almost every school will have some unique or distinct planning features.

The Template is available as an Excel document, and is designed so that it can be converted into a detailed and specific plan for *your school*. RSF recommends that you review the School Planning Template – and add, revise, or delete activities, as appropriate, for planning and/or implementing the school you wish to develop.

**Planning:** The full School Planning Template should be completed at the outset of your planning process, for it is very important that you back plan starting with the date you intend to open your proposed school. It is important that you set start and completion dates for all important planning activities, and assign responsibility for completion of such activities. Upon doing so, you will be ready to use the Template to manage and regularly evaluate your design team's overall planning progress. It is strongly recommend that your design team use the Template as a tool to monitor the status of *all* planning activities on a weekly basis or more frequently.

**Implementation:** Upon approval of your school application, you will want to revisit your school plan – making sure that: (1) any activities that should have been completed in Phases 0, 1 and 2 are addressed expeditiously; and (2) any CPS or RSF requirements for *opening* the school or receiving grant support are addressed in your final school plan.

Effective use of the School Planning Template as a planning, management, and evaluation tool is a first step in creating a culture of accountability for your planned new school. Keep in mind, the Template is a *working and evolving document*. School planning is not a stagnant process. Your school plan will grow and change through the process. Regular use of the School Planning Template may also help you identify additional capacity – skills sets, experience, or expertise – you need on your design team.



Property of The Renaissance Schools Fund



**New School Development**

**PHASE 0: CONCEPT DEVELOPMENT (2.5 years before opening)**

Category	PRE-APPLICATION ACTIVITIES (BY PHASE)	Start Time / Point	Duration / Deadline	STATUS	RESPONSIBILITY	NOTES
1.01 Concept Development	Assemble initial founding design team*	Immediately upon decision to pursue new school development	Team in place at least 1 year before Design Framework submission			New members should be added to team as need for skill sets / experience becomes clearer
1.02 Concept Development	Establish team decision making process*	Immediately upon team assembly	Within 60 days of initial team formation			
1.03 Concept Development	Research best practices*	Immediately upon team assembly	Ongoing- agree on specific practices for further exploration before Design Framework and Full Proposal submission			
1.04 Concept Development	Determine key school structures*	Immediately upon team assembly	4 months before Design Framework submission			
1.05 Concept Development	Identify potential partnerships needed*	Immediately upon team assembly to build community support and roots	4 months before Design Framework submission			
1.06 Concept Development	Draft 3-5 page Executive Summary (focusing on school vision -- i.e., what the school will look in its fifth year of operation)*	Immediately upon team assembly	One month into planning process			
1.07 Concept Development	Review CPS school application requirements and guidelines for preferred model and submission deadlines*	Immediately upon team assembly	One month into planning process			
1.08 Concept Development	Meet with appropriate CPS officials*	Immediately upon team assembly	Ongoing			
1.09 Concept Development	Understand available funding*	Immediately upon team assembly	Three months into planning process			
1.1 Concept Development	Obtain schedules for trainings and workshops offered by CPS, RSF, and other support organizations	Immediately upon team assembly (Review prior year's documents)				
1.11 Concept Development	Attend New Ventures in Education Seminar Series to acquire best practices in new school development (see RSF website)	April	June			
1.12 Concept Development	Research and visit successful national school operators*	Two months after initial team is assembled	Ongoing			
1.13 Concept Development	Determine governance structure for new school*	Immediately upon team assembly	Two to three months into planning process			
1.14 Concept Development	Identify initial board members*	Six months into planning process	Before filing separate non-profit status; two months before Design Framework submission			
1.15 Concept Development	Develop and file Articles of Incorporation, By-laws, and IRS 501c3 tax exempt status application*	Six months into planning process				<i>It is advisable to have an experienced attorney do this</i>
1.16 Concept Development	File application for IL tax exempt status	Six months into planning process				<i>It is advisable to have an experienced attorney do this</i>
2.01 Early Community Outreach	Determine initial target community or communities*	Immediately upon team assembly (if not the basis for assembling team)	Three months into planning process, revisiting options monthly to evaluate changing circumstances			
2.02 Early Community Outreach	Evaluate political landscape*	Immediately upon team assembly	Ongoing			
2.03 Early Community Outreach	Research and contact existing resources in community*	Immediately upon team assembly (if key members of design team are not rooted in targeted community)	Ongoing			
2.04 Early Community Outreach	Identify and visit local and national schools serving similar populations*	Two to four months into planning process	One month before Full Proposal submission			

New School Development							
PHASE 1: DESIGNING A SCHOOL (2 years before opening - Design Framework submission)							
Category	PRE-APPLICATION ACTIVITIES (BY PHASE)	Start Time / Point	Duration / Deadline	STATUS	RESPONSIBILITY	NOTES	
3.01	Designing a School	<b>RFP for New Schools Issued</b>	TBD				
3.02	Designing a School	<b>Design Framework -- Submission Deadline</b>	TBD				
3.03	Designing a School	Create a work plan (using this document)	Two years or more before school opening date	As soon as possible in advance of Design Framework submission			
4.01	Governance / Board Development	Define roles and responsibilities of the Board/ALSC*	One year before Design Framework submission	As soon as possible in advance of Design Framework submission			
4.02	Governance / Board Development	Recruit Board/ALSC members*	8 months before Design Framework submission	As soon as possible in advance of Design Framework submission			
4.03	Governance / Board Development	Establish Board/ALSC meeting schedule	As soon as some or all required members are recruited	2 months before Full Proposal submission			
4.04	Governance / Board Development	Establish and appoint Board Chair and members to appropriate committees*	As soon as some or all required members are recruited	Two months before Design Framework submission			
4.05	Governance / Board Development	Conduct governance orientation*	As soon as core set of members secured	One month before Design Framework submission			
4.05	Governance / Board Development	Determine skills and experiences needed in additional Board/ALSC members*	As appropriate during planning process Conduct monthly review in early stages	Ongoing			
4.06	Governance / Board Development	Develop process for adding new Board members/ALSC*	As soon as core members secured	Six months into planning process			
4.07	Governance / Board Development	Develop transition plan to formal Board/ALSC once approved*	Six months into planning process	1.5 months before Design Framework deadline			
4.08	Governance / Board Development	Develop draft of board policies and procedures	Six months into planning process	1.5 months before Full Proposal deadline			
5.01	Leadership Identification or Development	Determine school leadership structure*	2 months into planning process	2 months before Design Framework submission			
5.02	Leadership Identification or Development	Develop process to hire school leader (if needed)*	3 months into planning process	2 months before Design Framework submission		Ideally, school leader will be a member of the design team.	
5.03	Leadership Identification or Development	Execute school leadership identification or hiring process*	3 months into planning process	2 months before Design Framework submission			
5.04	Leadership Identification or Development	Determine leadership professional development opportunities to be pursued*	6 months into planning process	2 months before Design Framework submission; ongoing thereafter		Depends on experience and qualifications of identified school leader and familiarity with school design / curriculum	
5.05	Leadership Identification or Development	Incorporate leader into school design process	As soon as identified	2 months before Design Framework submission		This is one of the most critical steps of planning effectively to create a new school	
5.06	Leadership Identification or Development	Develop job descriptions for other leadership positions*	4 months into planning process	1 month before Design Framework submission			
5.07	Leadership Identification or Development	Execute identification or hiring process for other leadership positions*	As early as possible	1 month before Design Framework submission			
6.01	Accountability and Academic Targets	Create educational performance goals*	2 months into planning process, or earlier	2 months before Design Framework submission		This is a critical early planning step. See SMART Goals document on RSF website.	
6.02	Accountability and Academic Targets	Create operational and management performance goals*	2 months into planning process	2 months before Design Framework submission		See SMART Goals document.	

New School Development							
PHASE 1: DESIGNING A SCHOOL (2 years before opening - Design Framework submission)							
Category	PRE-APPLICATION ACTIVITIES (BY PHASE)	Start Time / Point	Duration / Deadline	STATUS	RESPONSIBILITY	NOTES	
7.01	Assessment Plan	Create a plan to gather baseline student data	2 months into planning process	2 months before Design Framework submission			
7.02	Assessment Plan	Determine required standardized assessments; and determine additional baseline or interim assessments	2 months into planning process	1 month before Design Framework submission			As school design is fleshed out, this will be an evolving activity
7.03	Assessment Plan	Determine priorities regarding how student performance data will be used to drive instruction*	2 months into planning process	1 month before Design Framework submission			
7.04	Assessment Plan	Create process to analyze student results	2 months into planning process	1 month before Design Framework submission			
7.05	Assessment Plan	Develop external and internal assessment schedules/timing based on needs of the timing and purpose of results analysis*	2 months into planning process	1 month before Design Framework submission			
8.01	Educational Program Development	Plan for low-performing and gifted students*	2 months into planning process	2.5 months before Design Framework submission			For most Ren 2010 schools, this activity is essential for overall educational program development
8.02	Educational Program Development	Plan school day structure, including student and teacher schedules, and annual calendar*	2 months into planning process	1.5 months before Design Framework submission			
8.03	Educational Program Development	Select curriculum (or determine clear, viable process for curriculum development) with course scope and sequence*	2 months into planning process	1.5 months before Design Framework submission			
8.04	Educational Program Development	Determine standards and expectations for student performance and grading	2 months into planning process	1.5 months before Design Framework submission			
8.05	Educational Program Development	Develop explicit method for instilling a planned school culture, including behavior system, discipline code and expectations for students and faculty	2 months into planning process	1.5 months before Design Framework submission			
8.06	Educational Program Development	Determine before- and after-school programs and extracurricular options*	2 months into planning process	1.5 months before Design Framework submission			For many schools, these programs are essential school design features
8.07	Educational Program Development	Write promotion/graduation requirements (based on established educational goals)	6 months into planning process	1 month before Design Framework submission			
8.08	Educational Program Development	Determine instructional staffing needs*	3 months into planning process	1.5 months before Design Framework submission			
8.09	Educational Program Development	Write a draft of the education program description*	4 months into planning process	3 months before Design Framework submission			
9.01	Professional Development	Research best practices regarding professional development needs of new school staff	2 months into planning process	Ongoing through planning process			
9.02	Professional Development	Determine induction program or structure*	3 months into planning process	1.5 months before Design Framework submission			Specialized school designs, models or programs may have fully developed professional development components
9.03	Professional Development	Create a schedule for induction training	3 months into planning process	1.5 months before Design Framework submission			This may be adjusted overtime
9.04	Professional Development	Determine resources needed for induction*	3 months into planning process	1.5 months before Design Framework submission			
9.05	Professional Development	Allocate funds for teacher salaries/stipends to cover induction	3 months into planning process	1.5 months before Design Framework submission			This is a key consideration in new school planning
9.06	Professional Development	Develop professional development schedule for first school year*	3 months into planning process	1.5 months before Design Framework submission			
9.07	Professional Development	Develop plan to train new teachers in subsequent years	3 months into planning process	1.5 months before Design Framework submission			This is a key out-year budget consideration, as well as staff preparation activity

New School Development							
PHASE 1: DESIGNING A SCHOOL (2 years before opening - Design Framework submission)							
Category	PRE-APPLICATION ACTIVITIES (BY PHASE)	Start Time / Point	Duration / Deadline	STATUS	RESPONSIBILITY	NOTES	
9.08 Professional Development	Develop long-term plan for annual professional development / in-service training schedule	3 months into planning process	1.5 months before Design Framework submission			This should follow or be tied to step above	
10.01 Specialized Populations	Determine CPS guidelines for special education, English Language Learners, students with social and emotional needs and homeless students	As early as possible in planning process	Duration- 3 months				
10.02 Specialized Populations	Determine the type and degree of student needs expected at proposed school based an understanding of the proposed community	2 months into planning process	Duration - 4 months				
10.03 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*	2 months into planning process	Duration- 4 months				
10.04 Specialized Populations	Develop a framework to address the needs of each specialized population*	2 months into planning process	1.5 months before Design Framework submission				
10.05 Specialized Populations	Determine staff, supplies and additional programs needed to support each specialized population	2 months into planning process	Duration- 4 months			This determination should be made early in the process to evaluate affordability or need to raise additional resources	
10.06 Specialized Populations	Integrate special needs service delivery into school model	2 months into planning process	3 months before Design Framework submission				
11.01 Technology	Determine technology needs based on proposed educational plan	2 months into planning process	1.5 months before Design Framework submission				
11.02 Technology	Research Student Information Systems based on evolving assessment plan*	2 months into planning process	1.5 months before Design Framework submission				
11.03 Technology	Determine E-Rate discount eligibility (depending on location and facility prospects) -- contract and charter schools only	2 months into planning process	As early as possible			Eligibility can be estimated based on targeted community. This is a key budget consideration.	
11.04 Technology	Develop "executive summary" technology plan narrative for inclusion in text of school application	4 months into planning process	1.5 months before school application submission				
11.05 Technology	Develop a three to five year technology plan*	6 months into planning process	By opening of school				
12.01 Facilities and Location	Determine facility space and usage requirements and identify potential sites (CPS buildings or independent) that are near target community*	As early as possible	Independent sites 6 months into planning process CPS sites: explore possible buildings in target communities once Design Framework is released				
12.02 Facilities and Location- CPS Facility	Develop a space usage plan after initial walk-through*	As potential facilities are identified	1.5 months before Full Proposal submission				
12.03 Facilities and Location- CPS Facility	Develop facilities plan narrative for inclusion in school application	6 months into planning process	Outline / summary by 2 weeks before Design Framework submission; narrative 1.5 months before Full Proposal submission			Too often, new school developers do not give this activity enough attention, though it is key to many aspects of new school planning	
12.04 Facilities and Location- CPS Facility	Estimate cost of additional improvements not covered by CPS based on a quote from a contractor or appropriate vendor	As potential facilities are identified and space usage plans developed	1.5 months before Design Framework submission			All budget projections should contain clear assumptions for improvements	
12.05 Facilities and Location- CPS Facility	Determine financing options and target cost for any renovations and capital expenditures	As potential facilities are identified and space usage plans developed	Preliminarily finance options 1.5 months before Design Framework submission; but ongoing until Full Proposal submission			Final financing plans cannot be completed until after school approval and/or site is known- See Illinois Facility Fund for financing advise	
12.06 Facilities and Location- Independent Facility	Develop necessary team skills and resources to identify and obtain a facility*	2 months or earlier into planning process	As early as possible				

New School Development							
PHASE 1: DESIGNING A SCHOOL (2 years before opening - Design Framework submission)							
Category	PRE-APPLICATION ACTIVITIES (BY PHASE)	Start Time / Point	Duration / Deadline	STATUS	RESPONSIBILITY	NOTES	
12.07	Facilities and Location-Independent Facility	Determine target mortgage/lease payments based on operating budget*	2 months or earlier into planning process	No less than 4 months into planning process			Total facilities costs should be 12 - 15% of budget, though may be in higher in earlier year
12.08	Facilities and Location-Independent Facility	Draft financing plan*	2 months or earlier into planning process	No less than 4 months into planning process			
12.09	Facilities and Location-Independent Facility	Determine facility criteria (proximity to potential partners, transportation, space requirements, community)	2 months or earlier into planning process	By Design Framework submission			
12.1	Facilities and Location-Independent Facility	Identify potential sites*	2 months or earlier into planning process	2 weeks before Design Framework submission			Process is ongoing and can change as opportunities are identified
12.11	Facilities and Location-Independent Facility	Conduct preliminary architectural review and assessment of facility/property including ADA requirements*	As potential facilities are identified	By Design Framework submission			
12.12	Facilities and Location-Independent Facility	Develop space usage plan*	As potential and viable facilities are identified and assessed	1.5 months before Design Framework submission			Only for suitable sites
12.13	Facilities and Location-Independent Facility	Estimate cost of improvements and annual lease payments (via preliminary negotiations with owner)	As viable sites are identified	1.5 months before Design Framework submission			
12.14	Facilities and Location-Independent Facility	Detail rehabilitation work*	As viable sites are identified	1.5 months before Design Framework submission			
12.15	Facilities and Location-Independent Facility	Determine a back-up facility	Ongoing as facilities are being examined	1.5 months before Design Framework submission			
12.16	Facilities and Location	Identify project manager for facility	Once site is preliminarily determined	2 weeks before Design Framework interview date			
12.17	Facilities and Location	Develop timeline for facility acquisition and improvements	Once site(s) preliminarily determined	2 weeks before Design Framework submission			
12.18	Facilities and Location	Develop facility plan narrative for inclusion in application*	2 months before Design Framework deadline	Outline 2 weeks before Design Framework submission; narrative 1.5 months before Full Proposal submission			
13.01	Community Outreach & TAC Process	Craft a community outreach strategy	At outset of planning process	6 months into planning process			
13.02	Community Outreach & TAC Process	Identify and meet with critical stakeholders in the community*	At outset of planning process	Ongoing			
13.03	Community Outreach & TAC Process	Solicit community input in school design*	Once executive summary is complete	2 months before Design Framework submission			
13.04	Community Outreach & TAC Process	Gather letters of support from community members	3 months before Design Framework submission	2 weeks before school Full Proposal submission			
13.05	Community Outreach & TAC Process	Secure key political support*	At outset of planning process (starting when forming design team)	2 weeks before Full Proposal submission, and ongoing thereafter			
13.06	Community Outreach & TAC Process- for CPS facility	Make initial contact and introductions with TAC liaison	1 month before Design Framework submission	Ongoing			
13.07	Community Outreach & TAC Process- for CPS facility	Attend C-TAC meetings	Consistently throughout planning process after initial contacts made	Ongoing			

New School Development							
PHASE 1: DESIGNING A SCHOOL (2 years before opening - Design Framework submission)							
Category	PRE-APPLICATION ACTIVITIES (BY PHASE)	Start Time / Point	Duration / Deadline	STATUS	RESPONSIBILITY	NOTES	
13.08	Community Outreach & TAC Process- for CPS facility	Identify role C-TAC can play in community outreach*	1 month before Design Framework submission	Ongoing			
14.01	Staffing	Determine overall staffing requirements based on school design*	4 months into planning process	1.5 months before Design Framework submission			
14.02	Staffing	Develop job descriptions for all instructional and non-instructional positions*	6 months into planning process	1 month before Design Framework submission		Some adjustments may be made after Design Framework feedback	
14.03	Staffing	Determine the hiring protocol and process for start-up and first year, and years thereafter	6 months into planning process	1 month before Design Framework submission			
14.04	Staffing	Develop faculty and non-instructional staff recruiting strategy and timeline*	6 months into planning process	1 month before Design Framework submission			
14.05	Staffing	Begin informal recruitment of faculty and staff	As early as possible in planning process	Until fully staffed			
14.06	Staffing	Create school specific personnel policies and procedures for inclusion in Full Proposal	4 months into planning process	1 month before Full Proposal submission		This should be an attachment in the Full Proposal	
14.07	Staffing	Begin to create employee handbook for inclusion in Full Proposal	4 months into planning process	1 month before Full Proposal submission		This should be an attachment in the Full Proposal	
15.01	Operations, Financial Planning and Fundraising	Familiarize team with CPS and RSF applications and ensure design team has financial planning capacity	At outset of planning process	3 months into planning process			
15.02	Operations, Financial Planning and Fundraising	Review financial models and projections for similar schools (model, grade level, enrollment)	At outset of planning process	4 months into planning process			
15.03	Operations, Financial Planning and Fundraising	Identify all CPS, federal, private planning and start-up grants available	At outset of planning process	3 months into planning process (with exception of private grants)		Searching for non-entitlement grant options should be ongoing	
15.04	Operations, Financial Planning and Fundraising	Verify criteria for including grants and soft money in application projections	At outset of planning process	3 months into planning process			
15.05	Operations, Financial Planning and Fundraising	Develop operations organizational chart*	2 months into planning process	1.5 months before Design Framework submission			
15.06	Operations, Financial Planning and Fundraising	Prepare staffing chart with associated costs*	4 months into planning process	1.5 months before Design Framework submission			
15.07	Operations, Financial Planning and Fundraising	Prepare necessary budgets (in accordance with CPS guidelines)*	4 months into planning process	1 month before Design Framework submission; revise based on feedback and finalize 1 month before Full Proposal submission		Further adjustments may be made to final school application after external review and mock interview	
15.08	Operations, Financial Planning and Fundraising	Plan 5 year fundraising plan*	4 months into planning process	1 month before Design Framework submission; revise based on feedback and finalize 1 month before Full Proposal submission		Final plan may not be completed until after school is approved	
15.09	Operations, Financial Planning and Fundraising	Prioritize school spending in internal document*	4 months into planning process	6 months into planning process			
15.1	Operations, Financial Planning and Fundraising	Prepare worst case financial projections including only committed revenues or revenues allowable per CPS guidelines	4 months into planning process	1 month before Design Framework submission			
15.11	Operations, Financial Planning and Fundraising	Appoint design team member or board member to oversee financial responsibilities*	As early as possible in planning process	1 month before Design Framework submission		This needs to be stated in school application	
15.12	Operations, Financial Planning and Fundraising	Create financial management plan for post approval*	8 months into planning process	1 month before Design Framework submission		Plan may not be fully completed until after approval	

New School Development							
PHASE 1: DESIGNING A SCHOOL (2 years before opening - Design Framework submission)							
Category	PRE-APPLICATION ACTIVITIES (BY PHASE)	Start Time / Point	Duration / Deadline	STATUS	RESPONSIBILITY	NOTES	
15.13	Operations, Financial Planning and Fundraising	Determine options for MIS's and accounting software if financial planning, management, and accounting is not done through CPS	4 months into planning process	1 month before Design Framework submission			
16.01	Student Recruitment and Admissions	Determine targeted grade levels and seats per year (and annual growth strategy, if not opening at full enrollment capacity)*	2 months into planning process	4 months into planning process			Targets may be revisited based on changing CPS needs
16.02	Student Recruitment and Admissions	Determine enrollment model (citywide, overlay boundary lottery, combination citywide/overlay, traditional)*	2 months into planning process	4 months into planning process			See above
16.03	Student Recruitment and Admissions	Determine family/student requirements or preferences (if any)	2 months into planning process	4 months into planning process			
16.04	Student Recruitment and Admissions	Develop application due date, lottery timing and process	4 months into planning process	1 month before Design Framework submission			
16.05	Student Recruitment and Admissions	Develop action plan and timetable for student recruiting*	4 months into planning process	1 month before Design Framework submission			
16.06	Student Recruitment and Admissions	Establish student recruiting goals of at least 125% of projected student enrollment in year one; and 115% in subsequent years	4 months into planning process	1 month before Design Framework submission			
16.07	Student Recruitment and Admissions	Develop enrollment benchmarks, with deadline for initiating back-up recruiting plan if targets are not hit at least 60 days before scheduled school opening	4 months into planning process	1 month before Design Framework submission			
16.08	Student Recruitment and Admissions	Develop simple application form and more detailed enrollment package*	4 to 6 months into planning process	1 month before Design Framework submission			Preliminary materials may be revised post approval
16.09	Student Recruitment and Admissions	Develop preliminary family / student focused school marketing materials and brochures*	4 to 6 months into planning process	1 month before Design Framework submission			Preliminary materials may be revised post approval
16.1	Student Recruitment and Admissions	Develop student/parent contracts	4 to 6 months into planning process	1 month before Design Framework submission			Preliminary materials may be revised post approval
16.11	Student Recruitment and Admissions	Draft student/parent handbook	6 months into planning process	1 month before Full Proposal submission			This should be an attachment in the Full Proposal
17.01	Food Service Program	Determine likelihood of eligibility for F&RP federal meals program (based on target community and anticipated student population)	2 months into planning process	4 months into planning process			
17.02	Food Service Program	Determine whether meals will be prepared on the school site (if the school has a cafeteria) or contracted out	4 to 6 months into planning process	1 month before Design Framework submission			
17.04	Food Service Program- On site	Determine standards and policies for food program*	4 to 6 months into planning process	1 month before Design Framework submission			
17.05	Food Service Program- On site	Create budget with possible fees charged, staffing and equipment needs, and any other equipment costs	4 to 6 months into planning process	2 months before Design Framework submission			
17.06	Food Service Program- contracted out	Research potential vendors	4 to 6 months into planning process	1 month before Design Framework submission			
17.07	Food Service Program- contracted out	Plan budget for serving and food costs	4 to 6 months into planning process	2 months before Design Framework submission			Determining whether food service program will break even financially is key budgeting step
18.01	Transportation	Determine student transportation requirements (particularly for students with an IEP)	At outset of planning process	4 months into planning process			
18.02	Transportation	Explore and confirm public transportation options for potential school location	2 months into planning process	4 months into planning process			

New School Development							
PHASE 1: DESIGNING A SCHOOL (2 years before opening - Design Framework submission)							
Category	PRE-APPLICATION ACTIVITIES (BY PHASE)	Start Time / Point	Duration / Deadline	STATUS	RESPONSIBILITY	NOTES	
18.03	Transportation	Decide if school will provide non-required transportation	2 months into planning process	3 months before Design Framework submission			If a school intends to provide transportation, this is key budget consideration early on in planning process
19.01	Communications, Messaging & Application Process	Designate primary spokesperson for school (principal or board member) and create short "school message"	2 to 3 months after team assembly	3 months before submission of Design Framework			
19.02	Communications, Messaging & Application Process	Designate primary application writer	Immediately upon team assembly	4 months into planning process			
19.03	Communications, Messaging & Application Process	Complete first draft of Design Framework	6 months into planning process	2 months before Design Framework submission			
19.04	Communications, Messaging & Application Process	Complete first full draft Design Framework	No less than eight months into planning process	1 month before Design Framework submission deadlines			
19.05	Communications, Messaging & Application Process	Finalize Design Framework	Immediately upon completion and review of first full draft (above)	20 days before application deadline			
19.06	Communications, Messaging & Application Process	Identify team to participate in Design Framework interview		10 to 14 days before scheduled interview			
19.07	Communications, Messaging & Application Process	Participate in a mock interview (conducted by internal members or external partners)		10 to 14 days before scheduled interview			
19.08	Communications, Messaging & Application Process	Finalize detailed implementation plan for inclusion in school application	2 months before Design Framework submission	1 month before Full Proposal submission			
19.09	Communications, Messaging & Application Process	Review school application to ensure all sections are aligned and flow together	Immediately upon feedback from external reviewers	2 weeks before Design Framework submission			
19.1	Communications, Messaging & Application Process	Identify team to participate in final school application interview	Immediately following Design Framework interview	2 weeks before interview date			
19.11	Communications, Messaging & Application Process	Participate in a mock interview (conducted by internal members or external partners)		10 to 14 days before scheduled interview			

New School Development							
PHASE 2: REFINING THE PROPOSAL (Design Framework submission - Approval)							
Category	PRE-APPROVAL ACTIVITIES (BY PHASE)		STARTING DATE	DURATION / DEADLINE	STATUS	RESPONSIBILITY	NOTES
20.01	Refining the Proposal	<b>Full Proposal Due</b>	<b>JULY 21, 2008</b>				
20.02	Refining the Proposal	<b>Approval Decisions Made</b>	<b>October 2008</b>				
20.03	Refining the Proposal	Refine Full Proposal based on feedback from the Design Framework	Immediately upon receipt of feedback	1 week before Full Proposal submission			
21.01	Governance / Board Development	Recruit additional Board/ALSC members to fill missing expertise*	Continue from phase 1, if necessary	Board / ALSC members in place 2 weeks before Full Proposal submission, if not before		Design Team and Initial Board until board subcommittee is formed	
21.02	Governance / Board Development	Approve additional Board/ALSC members*	As necessary	Up to 2 weeks before Full Proposal submission		Design Team and Initial Board	
21.03	Governance / Board Development	Schedule Board/ALSC training (post-approval)		Immediately upon application approval		Design Team and Initial Board	
21.04	Governance / Board Development	Continue development and refinement of Board policies and procedures (in manual form)	Continue from phase 1	2 week before Full Proposal submission		Design Team and Initial Board, or Board subcommittee	
22.01	Leadership Identification or Development	Identify top school leadership (if not already on design team)*	Continue from phase 1	1 month before Full Proposal submission			
22.02	Leadership Identification or Development	Continue identification process for additional leadership positions*	Continue from phase 1	1 month before Full Proposal submission			Continue or ramp up immediately upon approval
23.01	Accountability and Academic Targets	Review educational performance goals and update as necessary	Immediately upon receipt of Design Framework feedback	1 month before Full Proposal submission			
23.02	Accountability and Academic Targets	Review organizational and management performance goals and update as necessary	Immediately upon receipt of Design Framework feedback	1 month before Full Proposal submission			
24.01	Assessment Plan	Revise or redefine plans for gathering baseline data from incoming students, if necessary*	Immediately upon receipt of Design Framework feedback	2 week before Full Proposal submission			
24.02	Assessment Plan	Clarify implementation of the assessment and data driven instruction plan*	Immediately upon receipt of Design Framework feedback	2 week before Full Proposal submission			
25.01	Education Plan	Revisit curriculum identification process based on additional information about student needs and Design Framework feedback*	Immediately upon receipt of Design Framework feedback	2 week before Full Proposal submission			
25.02	Education Plan	Finalize curriculum development timeline*	8 months into planning process	2 months before Full Proposal submission			
25.03	Education Plan	Expand scope and sequence to cover content and courses at all grade levels of school	Continue and finalize from phase 1	1 month before Full Proposal submission			Include as attachments to Full Proposal
25.04	Education Plan	Finalize promotion and graduation policies	Immediately upon receipt of Design Framework feedback	2 week before Full Proposal submission			
25.05	Education Plan	Develop strategies to change or adapt curriculum to meet unexpected needs of student body	8 months into planning process	2 months before Full Proposal submission			

New School Development							
PHASE 2: REFINING THE PROPOSAL (Design Framework submission - Approval)							
Category	PRE-APPROVAL ACTIVITIES (BY PHASE)	STARTING DATE	DURATION / DEADLINE	STATUS	RESPONSIBILITY	NOTES	
25.06	Education Plan	Finalize detailed narrative plan for introducing the school culture in the first few weeks of schools	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
25.07	Education Plan	Refine remediation plan, if necessary*	Immediately upon receipt of Design Framework feedback	2 weeks before Full Proposal submission			
25.08	Education Plan	Review and update instructional staffing needs	Immediately upon receipt of Design Framework feedback	1 month before Full Proposal submission		Any changes must be incorporated into final budget	
25.09	Education Plan	Refine proposed student behavior system to support the school culture	Continue from phase 1 with feedback from Design Framework	2 months before Full Proposal submission			
25.1	Education Plan	Finalize student discipline code	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
25.11	Education Plan	Update the education program description for the full proposal	Immediately upon receipt of Design Framework feedback	2 weeks before Full Proposal submission			
26.01	Professional Development	Refine professional development plan based on development of school model, anticipated student needs and expert feedback	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
26.02	Professional Development	Revise, if necessary, allocation for teacher salaries/stipends to cover induction (i.e., pre-opening professional development)	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
26.03	Professional Development	Integrate school behavior expectations, policies, and discipline training into induction plans	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
26.04	Professional Development	Create structure for teacher collaboration*	4 months before Full Proposal submission	1 month before Full Proposal submission			
26.05	Professional Development	Identify and contact external professional development providers, if applicable	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
26.06	Professional Development	Refine and finalize professional development plan calendar for the first year of operations (and outline for succeeding years)	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
27.01	Specialized Populations	Refine plan to meet anticipated student needs based on additional knowledge about the community and expert feedback during Design Framework	Immediately upon receipt of Design Framework feedback and other external reviewer feedback	2 weeks before Full Proposal submission			
27.02	Specialized Populations	Revise / clarify process to identify and serve students with specialized needs including; special education students, English Language Learners, students with social and emotional needs, and homeless students	Immediately upon receipt of Design Framework feedback and other external reviewer feedback	2 weeks before Full Proposal submission			
27.03	Specialized Populations	Review staffing plan to determine sufficient expertise is in place to meet the expected needs of specialized student populations	Immediately upon receipt of Design Framework feedback and other external reviewer feedback	2 weeks before Full Proposal submission			
27.04	Specialized Populations	Establish tentative agreements / understandings with potential external service providers	Continue from phase 1	2 weeks before Full Proposal submission			
28.01	Technology	Identify Student Information Systems (SIS) that meets CPS requirements to be purchased upon approval	Immediately upon receipt of Design Framework feedback	2 weeks before Full Proposal submission			
28.02	Technology	Make final determinations for computer and technology needs for Year 1 vis-à-vis budget capability and options available through CPS	Continue from phase 1 with feedback from Design Framework	1 month before Full Proposal submission			
28.03	Technology	Finalize basic instructional and operational technology plan, including determining if school is eligible for e-rate discount program	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
29.01	Facilities and Location	Continue to perform due diligence on potential facility(s)*	Continue from phase 1 with feedback from Design Framework	Indicate preferred and back up site(s) in final Full Proposal			

New School Development							
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Category	PRE-APPROVAL ACTIVITIES (BY PHASE)		STARTING DATE	DURATION / DEADLINE	STATUS	RESPONSIBILITY	NOTES
29.02	Facilities and Location	Update facilities financing plan*	Immediately upon receipt of Design Framework feedback	2 weeks before Full Proposal submission			Costs of financing need to be reflected in final Full Proposal budget
29.03	Facilities and Location	Develop facilities improvement/code compliance time-line	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			Timeline and tentative improvement plan should be included in Full Proposal
29.04	Facilities and Location	Complete ADA accountability report for Full Proposal submission (see RFP or CPS ADA office for more information)	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
29.05	Facilities and Location	Negotiate terms of lease or purchase agreement to be signed upon approval (for independent facility)	Continue from phase 1	Ongoing			Leases should be conditioned on school approval
30.01	Community Outreach	Participate in community meetings*	Continue from phase 1	Ongoing			
30.02	Community Outreach	Revise community outreach, marketing, and student recruiting strategy based on community feedback	Continue from phase 1 with feedback from Design Framework feedback	2 weeks before Full Proposal submission			This is an essential element of final Full Proposal submission
30.03	Community Outreach	Continue to meet with key critical stakeholders in community*	Continue from phase 1 with feedback from Design Framework feedback	Ongoing			Consider including key community stakeholder in CET interview
30.04	Community Outreach	Continue to gather letters of support from community members and key stakeholders to include in Full Proposal	Continue from phase 1 if more letters of support are needed	1 week before Full Proposal submission			Letters of support should be included in Full Proposal as an attachment
30.05	Community Outreach	Review timing of C-TAC and community forums, public hearings and CPS Board interview and continue to participate in meetings	Continue from phase 1 and immediately upon Design Framework feedback	Until Full Proposal submission			
31.01	Staffing	Refine staffing needs based on changes in school design and Design Framework feedback	Immediately upon Design Framework feedback	2 to 3 weeks before Full Proposal submission			Significant changes to staffing pattern may trigger other budget adjustments
31.02	Staffing	Finalize personnel policies and procedures	Continue from phase 1	2 weeks before Full Proposal submission			This should be an attachment in the Full Proposal
31.03	Staffing	Solicit information from potential vendors on employee benefit package options, including retirement packages	Continue from phase 1	1 month before final school submission			These items (and attendant) costs may significantly impact final budget
31.04	Staffing	Develop "at will" employment contract (for contract and charter schools only); convert CPS standard contract for school specific use (for performance schools)	Continue from phase 1	2 weeks before Full Proposal submission			Draft contracts should be attached to final Full Proposal
31.05	Staffing	Continue to develop employee handbook	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			For inclusion in Full Proposal
31.06	Staffing	Develop background check procedure (include FBI & Child Abuse & Neglect Registry) and other CPS requirements	Continue from phase 1	2 weeks before Full Proposal submission			
31.07	Staffing	Continue informal recruiting of faculty and staff *	Continue from phase 1	Until Full Proposal submission and CET interview			Recruiting should continue after application submission and interview, if school approval is likely
31.08	Staffing	Screen applicants, including checking references, and prepare list of potential individuals per position to interview	Continue from phase 1	Ongoing		School principal, members of design team and/or Initial Board	Interviews can commence immediately upon school approval
31.09	Staffing	Consider interviewing applicants if approval is likely and tentative or formal (conditioned on school approval) commitments can be made	Continue from phase 1	Ongoing		School principal, members of design team and/or Initial Board	

New School Development							
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Category	PRE-APPROVAL ACTIVITIES (BY PHASE)	STARTING DATE	DURATION / DEADLINE	STATUS	RESPONSIBILITY	NOTES	
32.01	Operations, Financial Planning and Fundraising	Update budget to include additional operating or capital needs, including technology updates necessary for facility	Immediately upon Design Framework feedback	2 weeks before Full Proposal submission			
32.02	Operations, Financial Planning and Fundraising	Engage foundations to cultivate potentials funders; and confirm funding commitments contingent upon school approval	Continue from phase 1	2 weeks before Full Proposal submission		Final budget can include foundation grants if commitment letter is in hand	
32.03	Operations, Financial Planning and Fundraising	Revise budgets per Design Framework feedback and to accommodate all modifications to school plan made by design team*	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
32.04	Operations, Financial Planning and Fundraising	Prepare additional budgets required for CET*	Continue from phase 1 with feedback from Design Framework	1 month before Full Proposal submission			
32.05	Operations, Financial Planning and Fundraising	Determine narrative description of system for internal financial controls*	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
32.06	Operations, Financial Planning and Fundraising	Complete start-up grant funds (including RSF forms)	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
33.01	Student Recruitment and Admissions	Revise student recruitment strategy based on community and Design Framework feedback	Continue from phase 1	2 weeks before Full Proposal submission			
33.02	Student Recruitment and Admissions	Finalize application and enrollment plan*	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
33.03	Student Recruitment and Admissions	Confirm impartial lottery procedure based on determined enrollment model for selecting students if applications exceed available seats	Continue from phase 1 with feedback from Design Framework	2 weeks before Full Proposal submission			
33.04	Student Recruitment and Admissions	Finalize student application form (based on forms used by other schools) and parent/guardian authorization for transfer of student records	Continue from phase 1	2 weeks before Full Proposal submission		Include as attachments to Full Proposal	
33.05	Student Recruitment and Admissions	Complete/finalize student registration forms and kit*	Continue from phase 1	2 weeks before Full Proposal submission		Completed packed should be appended to Full Proposal	
33.06	Student Recruitment and Admissions	Develop confidentiality policy for student records, including filing system safeguards	Continue from phase 1	2 weeks before Full Proposal submission			
33.07	Student Recruitment and Admissions	Update and translate preliminary draft of parent/student contract	Continue from phase 1	2 weeks before Full Proposal submission		Include as attachment to Full Proposal	
33.08	Student Recruitment and Admissions	Complete draft student/parent handbook	Continue from phase 1	2 weeks before Full Proposal submission		Include as attachment to Full Proposal	
33.09	Student Recruitment and Admissions	Create Q&A and fact sheets on school design, educational program, and goals to distribute to parents, students and community members	Continue from phase 1	2 weeks before Full Proposal submission		Include as attachment to Full Proposal	
34.01	Communications, Messaging & Drafting Application	Identify team members to participate in CET interview	Immediately upon Design Framework feedback	1 week before CET interview			
34.02	Communications, Messaging & Drafting Application	Complete full proposal	Immediately upon Design Framework feedback	3 weeks before Full Proposal submission deadline			
34.03	Communications, Messaging & Drafting Application	Review full proposal to ensure all sections are aligned and flow together	Immediately upon completion of first final draft of proposal	3 weeks before Full Proposal submission deadline		Reviews should be ongoing until submission	
34.04	Communications, Messaging & Drafting Application	Participate in a mock CET (conducted by internal members or external partners)		2 to 4 weeks before Full Proposal submission deadline			
34.05	Communications, Messaging & Drafting Application	Participate in CET		On date(s) scheduled		Probably in mid- to late August	

New School Development						
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Category	PRE-APPROVAL ACTIVITIES (BY PHASE)	STARTING DATE	DURATION / DEADLINE	STATUS	RESPONSIBILITY	NOTES
34.06 Communications, Messaging & Drafting Application	Complete principal assessment interview			On date(s) scheduled subsequent to CET interview		Probably in mid September