Charter School Operations

2018 New Operator Training

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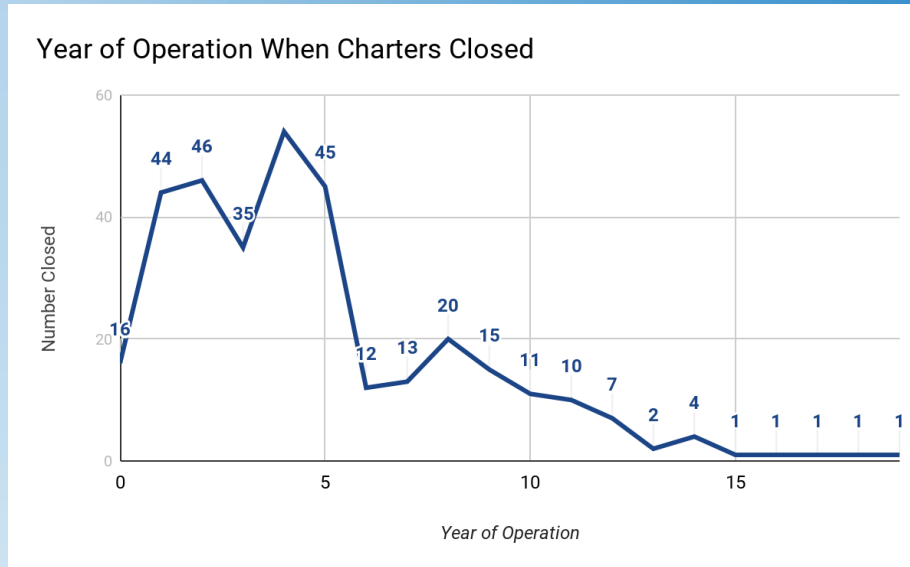Email: **cfuller@flcsu.org**

This presentation is available online at:

http://www.flcsu.org/2018-new-applicant-training/

Florida's Charter Support Unit

The early years are the most difficult

Year of Operation When Charters Closed

This is why the state identified the need for new charter schools

AGENDA

- New School Checklist
- Enrollment
- Staffing
- Policies
- Governance
- Other Miscellaneous Tips

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New School Checklist

- Narrative task lists of things to be completed for starting a new school

- Broken down by phases and topics

- A reference for things to think about

- If you have ideas for additions, please share

Student Enrollment

Marketing

- Develop a common look

- Adds professionalism and 'brand awareness'

- Develop a template for things like forms, letters, etc.

School's Website

- What is your intention? Recruiting, communication, etc.?
- Legally Required information:

  - Name/Contact for representative to facilitate parental involvement
  - Names of governing board members
  - Annual Budget
  - Programs offered at the school
  - Any EMO/CMO associated with the school
  - Board Meeting Minutes posted quarterly

  - Once you have them:
    - Academic Performance
    - Annual Audit
    - School Grade

Enrollment Process

Everyone looks at the process a little different.

<u>My terminology:</u>

1. **Register** *(Basic information)*
2. **Lottery** *(Random Selection)*
3. **Enrollment** *(Detailed information)*

Student Registration

- Be careful with your questions

- Recommend asking for initial basic information

Lottery

- Statute States:

  Enroll an eligible student who submits a timely application, unless the number of applications exceeds the capacity of a program, class, grade level or building. In such case, all applicants shall have an equal chance of being admitted through a random selection process.

  1002.33(10)(a)

- All students should be accepted through a random process
- Recommend setting multiple enrollment deadlines / windows

Sample Enrollment / Lottery Calendar

Deadline (by 3:00pm)	Lottery Date
Wed., April 1	Fri., April 3
Wed., April 22	Fri., April 24
Wed., May 13	Fri., May 15
Wed. June 3	Fri June 5
Wed., June 24	Fri. June 26
Wed., July 15	Fri., July 17
Wed., Aug. 5	Fri., Aug. 7
Wed., Aug 19	Fri., Aug. 21
27th of each month	Last business day of each month

Recommend longer initial enrollment period so as to not be accused of catering to insiders.

Controlled Open Enrollment

(§1002.31) Starting in 2017-18: "each charter school shall allow a parent from any school district in the state whose child is not subject to a current expulsion or suspension to enroll his or her child in and transport his or her child to any … charter school, that has not reached capacity …"

- Charter must determine capacity, and identify it on the website (Governing Board's responsibility).
- May provide preferential treatment: active duty military, foster care placement, court-ordered change in custody, student residing in the school district, enrollment limitations for charters.
- "(e) Students residing in the district, including charter school students, may not be displaced by a student from another district seeking enrollment under the controlled open enrollment process"
- Students who transfer with this process may remain at the chosen school until the student completes the highest grade level at the school.

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Another Balancing Act

1002.33(10)	**1002.31(2)**
all applicants shall have an equal chance of being admitted	in the district students may not be displaced by a student from another district

Highly recommend this be in your written policy

Two potential options:

- Each lottery has two selections: in-county, out-of-county
- In-County lotteries only until a certain date, then out-of-county

Student Lottery Preferences

- Siblings of a student enrolled in the school
- Children of members of the governing board
- Children of an employee of the school
- Children of active duty member of military branch
- Special Circumstances
  - Employee of a business partner (if school-in-the-workplace)
  - Resident of municipality (if school-in-a-municipality)
  - Students who were in VPK provided by the charter
  - Resident/Employee of municipality allowing a charter to use land*

- ***Different rules if you are a CSP Recipient***
  (Sibling, founding board member child)

* As of July 1, 2016 (Approved in HB 7029)

Other Lottery Suggestions

- Develop a fair process

- Build in ways to guard against discrimination

- Be sure it is random

- Doesn't need to be an "event," but could be

Student Enrollment

- After students have been selected to the school, then ask for detailed student information.
- Consider putting together a packet of information
  - **Registration**
  - **Student Handbook** *(Anti-Bullying Policy, Attendance / Truancy, Behavior Policies, Calendar, Cell Phones, Dress Code / Uniform Requirements, Enrollment process, Extracurriculars?, Grading / Homework Policies, Online Acceptable Use Policy)*
  - **Emergency Information**
  - **Waivers** *(publicity, medical, internet, etc.)*
  - **Course requirements**

Become Familiar With "FTE"

- FTE Deadlines are essential

Survey 2	Survey 3
October 8-12, 2018 Due Date: October 19, 2018	February 4-8, 2018 Due Date: February 15, 2019

- Inaccurate data will likely cost your school revenue, or fines.
- Hire well … Ensure accuracy
- Watch for training from your district, and consider hiring data management technician as early as possible

Webinar: Preparing for Survey Two - Ensuring Your School is Funded (2015)

flcsu.org/preparing-for-survey-two-ensuring-your-school-is-funded/

Webinar: FTE Class Size Information (2014)

flcsu.org/fte-class-size-information/

Webinar: FTE Re-Calibration (2014)

flcsu.org/fte-re-calibration/

Webinar: Importance of Data Reporting to Ensure Full FTE Funding (2012)

flcsu.org/the-importance-of-data-reporting-to-ensure-full-fte-funding-2/

Staffing

If you haven't started yet, you're running late

Posting

Where to post

- Your website
- teachers-teachers.com/Frontline
  - Contact Dave Pfisterer
  - 904-786-7774
  - dpfisterer@teachers-teachers.com
- District's website
- Social Media
- Paid postings / Headhunters?

Review / Screening

Interviews are stressful and exhausting… so screen carefully

Don't Wing It …
Develop a process

- How will applications be reviewed?
- What will you be looking for in the review?
- What specific traits do you want to see?
- If you have too many applications, could you build in an additional step?

Do your Due Diligence

1002.33(12)(g)(4): Before employing instructional personnel or school administrators in any position that requires direct contact with students, **a charter school shall conduct employment history checks of each of the personnel's or administrators' previous employers**, screen the instructional personnel or school administrators through use of the educator screening tools described in s. 1001.10(5), and document the findings. If unable to contact a previous employer, the charter school must document efforts to contact the employer.

Guess What ?
I just found out the Police want to Interview me.

Strange....
I did'nt even Apply for a Job there

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Offering The Job

Timing is important…

- **Do <u>NOT</u> overhire!**

Job offer letter

- You may wish to have an attorney or HR dept review
- You may want to make it conditional

Are you negotiating?

Hiring / "On Boarding"

- Develop a process
- Develop a checklist for everything that needs to be done
- Before the staff member is with students, finish the background check
- Before the staff member starts, finish the I9

Teacher Evaluation & Salary Schedules

- Teacher evaluation system
  - Must result in rating of:
    - Highly Effective
    - Effective
    - Needs Improvement (or Developing)
    - Unsatisfactory
  - Consider adopting another evaluation system
    - Sample State Models: http://resource.leadandlearn.com/stakeholder-toolkit/
    - State's Evaluation Site: https://charterevaluationtraining.fldoe.org/

Webinar: Florida Charter School Evaluation Site
flcsu.org/florida-charter-school-evaluation-site/

Performance Salary Schedule

- Adjustments change base salary

Adjustment Type	Requirements
Highly Effective rated employees	Highest type of adjustment
Effective rated employees	50 - 75% of highly effective adjustment
Cost of Living	Not to exceed 50% of effective adjustment

- Supplements are in addition to base:
  - Title 1 schools, "F"or 3-"D"'s, Critical shortage areas, Additional academic responsibilities
  - Advanced Degrees in the area of certification

Webinar: New Salary Schedule Requirements
flcsu.org/new-salary-schedule-requirements/

Consider a Compensation Manual

Specifically clarify compensation policies:

- Employee Leasing Companies

- 10 versus 12 months

- Resignation / terminations and late new hires.

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Policy Manual

- Policies: The Board's direction to staff on operations

- Having a 'policy' protects the school and staff, especially from helicopter parents

- Organize a structure to keep any/all policies approved

Policies To Consider

General Policies

- Non Discrimination
- Anti-harassment
- Volunteer Policies

Board Policies

- Public Comment
- Establishing Agendas
- Conflict of Interest

Policies To Consider

Employment Policies

- Compensation
- Evaluations
- Holidays
- Discipline
- Conduct expectations

Students

- Attendance
- Behavior
- Dress Code
- Grading / Homework
- Acceptable Use
- Electronic Devices

Policies To Consider

Business

- Purchasing
- Handling Cash
- Retention
- Capital Policy
- Audits

Other Areas?

- Transportation
- Food Services
- Facilities
- Before / After Care

The Role of the Governing Board

To oversee the operations of the school
Generally the main responsibilities of a board are:

- Overseeing the financials and setting budgets
- Establishing policies
- Establishing the strategic plan
- Hiring and evaluating administrators

Corporate Documents

- Articles of Incorporation *(Establishes the organization)*
- ByLaws *(Defines (in broad strokes) the way the Board operates)*
- Policies *(The Board's directions to staff members & others)*
- Charter Contract *(Your agreement / obligations to the district)*
- Annual Budget *(The Board's directions on how money is to be spent)*

Remember Public Records

"includes all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other materials, regardless of physical form, characteristics or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency."

- Must be made available if requested
- Personnel records are public *(although a few exceptions do exist)*
- Board member emails about school issues are public

Effective Board Meetings: Reporting

What information does the Board need to effectively make decisions for your school?

Develop a "Dashboard" of data components you want to see

- Enrollment
- Financial
- Human Resources
- Facilities
- Assessment Results

Have reports in writing before the meetings

… We'll just use "Executive Session" …

We recommend only using if a lawyer tells you to do so.

- Executive Sessions are often a violation of sunshine requirements
- Only exceptions are:
  - Attorney client meetings
  - Collective bargaining discussions
  - Meetings involving minors
- No exceptions for personnel issues.
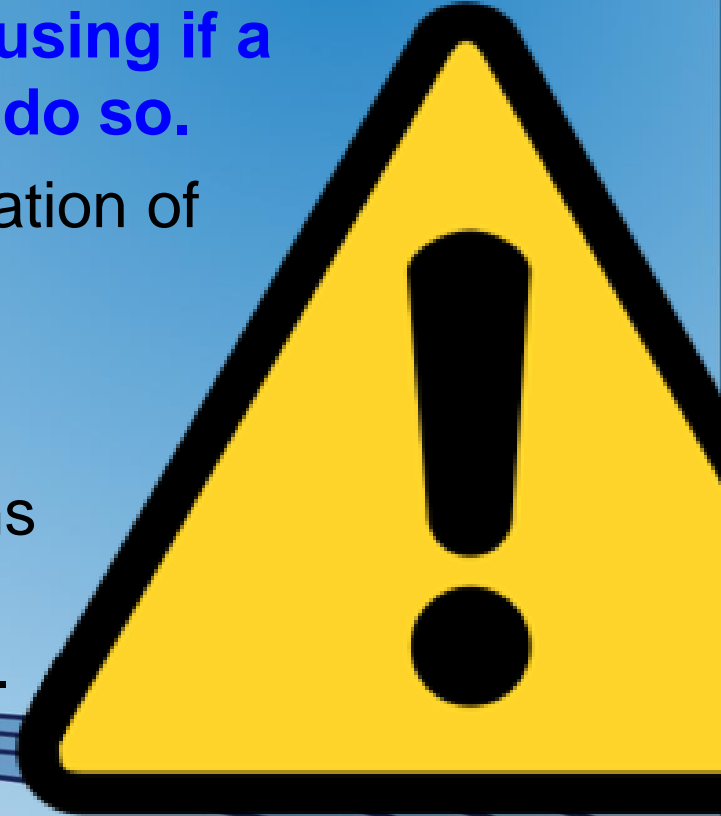
Webinar: Effective Board Meetings & Members
flcsu.org/effective-board-meetings-members/

Webinar: Governance in the Sunshine
flcsu.org/governance-in-the-sunshine/

Webinar: Tips for Effective Board Functioning
flcsu.org/tips-for-effective-board-functioning/

Safety and Security

- Create a detailed plan, think through scenarios and be prepared!
  - Your safety plan is confidential
- 2018 SB 7026 - "Marjory Stoneman Douglas High School Public Safety Act?"
  - Security Officers
  - Mental Health Funding
  - Technical Assistance forthcoming

Upcoming Conference

July 23-27 in Orlando

I've heard positive things about this conference in the past.

Communication

- Keep parents in the loop during the planning process

- Communication often

- Use your website to post regular updates

- Setup an email list

- Use social media

- Encourage staff to work together/communicate now & often

Work with your district

- Know your contract inside and out

- Understand your deadlines, and don't miss them

- Do what you can to build positive relationships

Purchasing

- Be sure to follow your policy
- Educational companies are very busy in August–**expect delays/backorders**
- Inventory
  - Be sure to develop a process before you start receiving materials
  - Inventory labels
  - Be sure to separate items from different fund sources (i.e. General Fund, Grant Funds, etc.)
  - Be sure to retain quotes / price comparisons for large purchases
- Textbooks
- Develop a process for checking out / monitoring books

Scheduling

- Use the master schedule to accomplish your goals
- **Get to know your district's reporting systems**
- Use many sets of eyes
- Computerized versus By-Hand
- Students First, but staff too
  - Student Minutes
  - Staff Planning
  - Avoid Burn Out

First Day

- You cannot over plan

- Think through the day, the quarter, the year

- The more prepared you are for the operations and procedures, the more you can focus on the student

- Is Facility Ready and Safe?

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