



Free **expertise and resources** to help public charter schools thrive.



Our Team...



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- Former English Teacher
- Former Charter School Principal
- Former Private School Head of School
- Former ED for M-DCPS district-managed charter schools
- Former Director of Finance and HR for a Network of charter schools
- Operates the Charter Support Unit



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- Former Teacher
- Former Charter School Principal
- Director of Charter School Operations for Building Hope
- Operates the Florida Charter Institute



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- Former Teacher
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- Former ED of a network of charter schools
- Assist CSU: Board Governance Program, Governance Conference



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- Former Music Teacher
- Former Charter School Principal
- Former Charter School Board Member
- Assistant Director of Charter School Operations for Building Hope
- Assist CSU: Grants and HR

Our Launch Year Expert



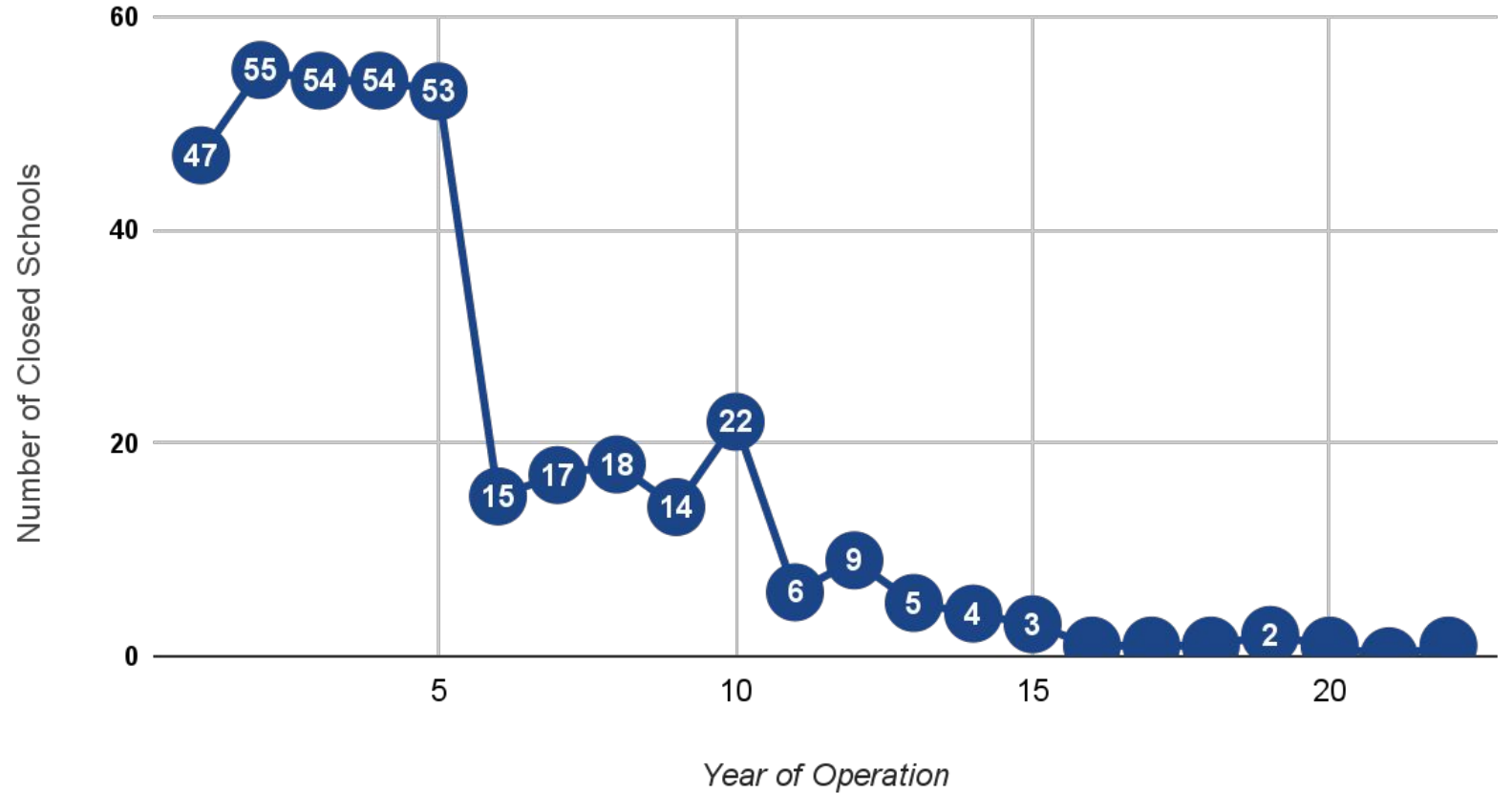
CONSTELLATION
CHARTER SCHOOL OF GAINESVILLE, FL

Razia Ali Hamm

*Founding School Principal
Constellation Charter School
Opened in August 2023*

The early years are the most difficult

Year Of Operation Charter Schools Closed



Source: State MSID Database data regarding closed public charter schools (October, 2019)

The Charter Support Unit is here to help charter schools thrive.

National Scope, Local Expertise

Every public charter school across America operates in a slightly different environment. But the priorities are the same wherever you are: serve students well, operate responsibly and sustainably, deliver value for families and taxpayers. The Charter Support Unit's no-cost resources and expertise can help your school achieve those essential goals and many more.

The CSU is here to help charter schools nationwide. With focused expertise in **Florida, Texas, Upstate New York, Washington DC, Nevada, Idaho** and **rural communities**, we meet your needs from coast to coast.



Services for Schools

Having led charter schools ourselves, we recognize you might not have chosen this work because you love budgeting, facilities planning, or compliance. It all connects to student and school success, however, so understanding the administrative side of running a school is essential. Lean on the CSU to help you with an array of resources, services, and counsel — at no cost to your school.



Planning & Launching

Thoughtful planning, before and after a school receives its charter, is key to a successful opening.



Boards & Governance

New boards need to understand their responsibilities. Veterans need to plan for the school's future.



Facilities Planning

Our experts can help you build the budget, establish expectations, and create an action plan.



Finance & Budget

Whether it's the annual budget or a building project, we can help you maximize your resources.



Compliance & Grant Administration

The CSU can help your school maximize your grant returns and ease the stress of compliance paperwork.



School Operations

Resources and guidance to help charter schools run smoothly and safely.

There are so many ways the CSU can help your school.



One-on-One Consultations

Have an issue that would benefit from an outside perspective? CSU consultants are available to meet with school leaders and boards to work through your school's particular challenges or to help you advance your mission in new ways.



Trainings, Webinars, Online Courses

The Charter Support Unit offers ongoing and free trainings, webinars and online courses. We also maintain a robust library of resources and documents that any charter school can use.



Real People, Real Resources

We're here...because we've been there. The CSU's team of consultants is eager to share what we've learned from developing, leading and growing schools. Turn to us for tested strategies and tools collected from some of the country's most successful charter school leaders and advocates.

The Charter Support Unit is managed by Building Hope, a nonprofit serving charter schools nationwide, and is supported financially through government and philanthropic grants.



Charter Support Website
charter.support



... disclaimers ...

- We are not attorneys
- We are not your financial advisor
- We need you to sign a brief statement acknowledging our role before direct services can be provided
- We will collect the name of your school and the type of support provided for reporting our activities



QR Code to a shared resources concerning the topic & the Website to access it

Slide Format

“Anything in italics will be a direct quote of a statute or law.”

- Points of interest
- Points of interest
- **RED – Warning! Take Notice!**



QR Code to a webinar or training concerning the topic & the Website to access it

Today's Agenda

- Introductions
- Starting a Charter
- Governance
- The Business of School
- Contract Negotiations
- Facilities
- Financing
- Marketing & Messaging
- Student Enrollment
- Administration and HR
- CSP Grant
- Accounting

Let's make today interactive!





Introductions - Around the Room

- Your name?
- What has brought you to the charter school arena?
- Where are you in the process?
- What will make your school unique?
- What do you most hope to take away today?

Starting a
Charter

Expectations

Launch Year Training

New Schools Checklist

Project Management

Platforms

**Go In
Eyes
Wide
Open**

Opening A Charter

A black silhouette of a person pushing a large, round rock up a steep, dark hill. The person is bent over, using their hands to push the rock. The background is white, and the hill is a solid black shape.

**It is
a long
difficult
road to
opening**

Launch Year Trainings & Live Sessions

The **Launch Year Training** is a series of Florida-specific trainings provided for free to school leaders who are working to open a new charter school opening in the state of Florida. Governing Board members and newly hired administrators will particularly benefit from these trainings.

Register here:



CSU Launch Year Training Course

<https://csu.li/launch24course>

Launch Year Collaborative Sessions, monthly live meetings to discuss the issues participants are facing each month. These occur on the second Tuesday of each month at 7:00 PM EST using Zoom beginning November 14, 2023.

Register here:



Registration for Launch Year Collaborative Sessions

<https://csu.li/launch24>



New School Checklist

<https://charter.support/resources/florida-new-school-checklist/>

New School Checklist



“What’s next?”



Lists of things to be completed for starting a new school



Broken down by phases and topics



Narrative with details



A reference for things to think about



Work in Progress



New School Checklist Webinar

<https://charter.support/webinar/new-schools-check-list-webinar/>

Project Management

Managing your project is essential

Starting a school is not a one-person job

Use a task management software/site:

- What do you need?
- Collaborative
- Document storage
- Gantt charts
- Email reminders
- Chat / commenting
- Scheduling
- Mobile access
- Recurring tasks
- Repeatable templates

 Trello

 Wrike

 Trello

 todoist

 Basecamp

 monday.com

 Google Workspace

 asana

 ActiveCollab

 Microsoft Teams

Once you select a platform



Once you select a tool, learn how to use it effectively.

Use it regularly.

Expectations and culture are important!

Make sure your team is consistent with use

Governance

Governance Onboarding

Government in the Sunshine

Open Records

Quorums

Meeting Organization

Onboarding New Board Members

Onboarding Tasks

- Resume on File
- Complete Fingerprinting/Background Check
- Complete Initial Governing Board Training (4hr)
- Provided Governing Board Manual
- Completed Conflict of Interest Form
- Completed Financial Disclosure Form

Governing Board Manual

- School Overview: Mission, Vision, Strategic Plan, History
- Calendars: Board Meetings, School, Special Events
- Charter School Contract
- Complete Policy Handbook
- Board Bylaws
- Most Recent Independent Financial Audit
- Annual Budget
- Accreditation Report, School Reviews, etc.



New Governing Board Member Checklist
<https://csu.li/new-board-member-checklist>



<http://csu.li/3>

Governance Training

- 4-hours required.
- Must be completed within 90-days of appointment
- 2-hour refresher every three years
- *Separate from the New Operator Training required at least 30-days prior to opening (Typically in May)*



Governance Development



CSU Annual Governance Conference: This annual hybrid event focuses on serving the needs of Charter School Governing Board Members throughout the state of Florida.

- Role of the Board
- Working with Authorizers
- Facilities & Financing
- Finding the Right School Leader
- The Dynamic Duo: The Charter School Leaders & The Board Chair
- Impacting Culture: Climate, Relationships and the Problems of Today
- Governing Board Practices
- Growth & Community Engagement: Through an Authorizer's Lens
- Florida Resource Round Up
- Legislative Updates
- Biggest Legal Mistakes Charter Schools Might Make
- Governance in the Sunshine
- Public Records Requests
- Conflicts of Interests for Board Members & Staff
- Evaluating the Principal/Executive Director
- Title IX
- Your School Had a Deadly Weapon Event Today! What happens Next?



Governance Conference 2023 Presentations
<https://csu.li/23govdev>



Is It Sunny Yet?

- Government in the Sunshine
- Once your contract is signed
- Meetings must be posted
- Communication must be in the sunshine
- Public Records



Governance in the Sunshine Webinar


<https://charter.support/webinar/government-in-the-sunshine-part-1/>

Right of Access

- The intention of the sunshine requirement is to “provide a right of access to the decision making process of Boards”
- **Knowingly violating the “right of access” potentially makes individual board members liable for \$500 fine & 60 days in jail.**



Basic Things To Remember

- All official acts must be taken at a public meeting
 - No two board members may discuss anything that could potentially come before the Board outside of a public meeting
 - Unilateral communication is okay, discussion is not
 - Advisory committees are also subject to the sunshine laws
 - Cannot use liaisons to circumvent the requirements
- 

What Is Quorum?

- Minimum number of people required to make decisions
- Not defined in statute
- Usually defined in ByLaws
- CSP requirements are more than 50%
- Government in the Sunshine manual says quorum must be present in person (CMT?)



Communication Media Technology

- ... Members of the governing board may attend in person or by means of communications media technology used in accordance with rules adopted by the Administration Commission under s. 120.54(5).

- Must provide a physical “access point”
- If technical issues prevent communication, meeting must stop
- Notice must include:
 - Address of all access points (which are open to public?)
 - Contact info for additional information
 - Contact info for sharing written evidence

... Just use “Executive/Shade Session” ...


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

- Executive or Shade 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





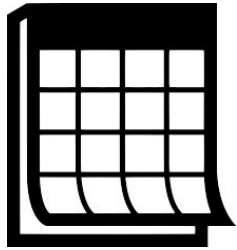
Remember Public Records



•“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 some exceptions do exist*)
- Board member emails about school issues are public
- Be sure to post on your site who the custodian is

Board Meeting Organization



Develop an annual board schedule with topics relevant to that time of the year



Develop a process for sending materials to members



Develop a regular template for board minutes



Set timelines and try to stick to them



Sample Annual Board Meeting Schedule

<https://charter.support/document/general-annual-board-schedule/>

Process & Timelines Are Important

Suggestion:

(your governing docs may outline different days)

Prior to Meeting	Task
4 weeks	Board Financials to ED/HOS/Principal
3 weeks	Board Financials to Board Treasurer
2 weeks	Draft Agenda to Board Chair
2 weeks	Collect data, highlights, reports from leadership team
1 week	Agenda, Minutes, Board Financials, School Reports, etc. sent digitally to the board
2 days	Board folders (Agenda, Minutes, Board Financials, School Reports) prepared
1 week post-meeting	Previous approved minutes posted to website
2 weeks post-meeting	Unofficial minutes sent to board for review and feedback



Board Meeting Preparation Calendar

<https://charter.support/document/board-meeting-preparation-calendar/>

Agenda

Opening Session

- Roll Call, Agendas, etc.

Reports

- Just to ask questions from written reports

Consent Agenda

- Approved with the agenda
- Items can be “pulled” by Board members
- No discussion except on “pulled” items

Board Discussion / Action

- Sometimes broken into Old / New Business
- This is where most of the Board’s time should be.
- Recommended to have Strategic Planning item at every meeting



Sample Board Meeting Agenda

<https://charter.support/document/board-meeting-agenda/>



<u>Routine and Reports</u>		
I	Call To Order	7:00pm
II	Roll Call	
III	Approval of Minutes <ul style="list-style-type: none"> ● January 17, 2012 	
IV	Reports <ul style="list-style-type: none"> ● Superintendent's Report ● Financial Report ● Staff Report ● Committee Report 	7:10pm
<u>Business</u>		
V	Non-Highly Qualified Teacher Approval	7:20pm
VI	Policy Revision (3.4.6)	7:25pm
VII	Staff Survey	7:40pm
VIII	Budget Update	7:50pm
<u>Miscellaneous</u>		
IX	Other	8:30pm
X	Adjournment	8:35pm



Sample with Time Limits

I. Opening Session
A. Call to Order Roll Call

Called to order at 12:11 pm

Roll Call:

- **Board Members Present:** Miguel Briceno, Julio I
- **Board Members Participating Electronically:** Ja
- **Non-Board Members:** Curtis Fuller, Richard Mor
Gustavo Rosas

This is just a sample, not a required format

Directly From Agenda

Small gray text is what was on the agenda

B. Agenda - Approval of Agenda

Moved to approve the agenda moved by Mr. Cesepe
Approved unanimously.

Larger Bold Text are motions and actions taken

I encourage having the motions in writing if they are complicated, so that the language is clear.

II. Reports

A. School Progress Report

See attached

B. Financial Report

Explained that Building Hope has not yet started manag
report is available.

Larger unbolded text summarizes conversations

Be sure to attach relevant and supporting documents if they are needed to explain discussion.

III. Consent Agenda

Minutes Made Easy
Use the agenda as your guide

End of Governance

Any Questions about
Governance?

Next up:

Operating as a
Business

The Business
of School

You ARE a Business

Corporate Docs

Tax Statuses

Policies & Procedures

Systems Management

You Are A Business!

- What business practices do you need to establish?
 - Policies Manuals
 - Insurance - cover your Governing Board too
 - Office Procedures
 - Tax Statuses
 - Finances
 - HR management



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*)



Important Resources



Florida Statutes

<http://www.leg.state.fl.us/Statutes/>



Charter Support Unit Legal Handbook

<https://charter.support/resources/florida-charter-school-legal-handbook/>



Government in the sunshine manual

<http://www.myfloridalegal.com/sun.nsf/sunmanual>



DOE School Choice Charter Schools Office

<http://www.fldoe.org/schools/school-choice/charter-schools/>



Tax Exempt Status

Three Unique Statuses:

- Not For Profit Corporation
- Sales Tax Exemption
- 501(c)(3) Public Charity



FL Department of Revenue Website
http://dor.myflorida.com/Pages/forms_index.aspx

Florida Sales Tax Exemption



Can be completed as soon as you have a charter contract



Do not wait until you're a 501(c)(3) - save money



Florida Dept of Revenue Form: DR-5

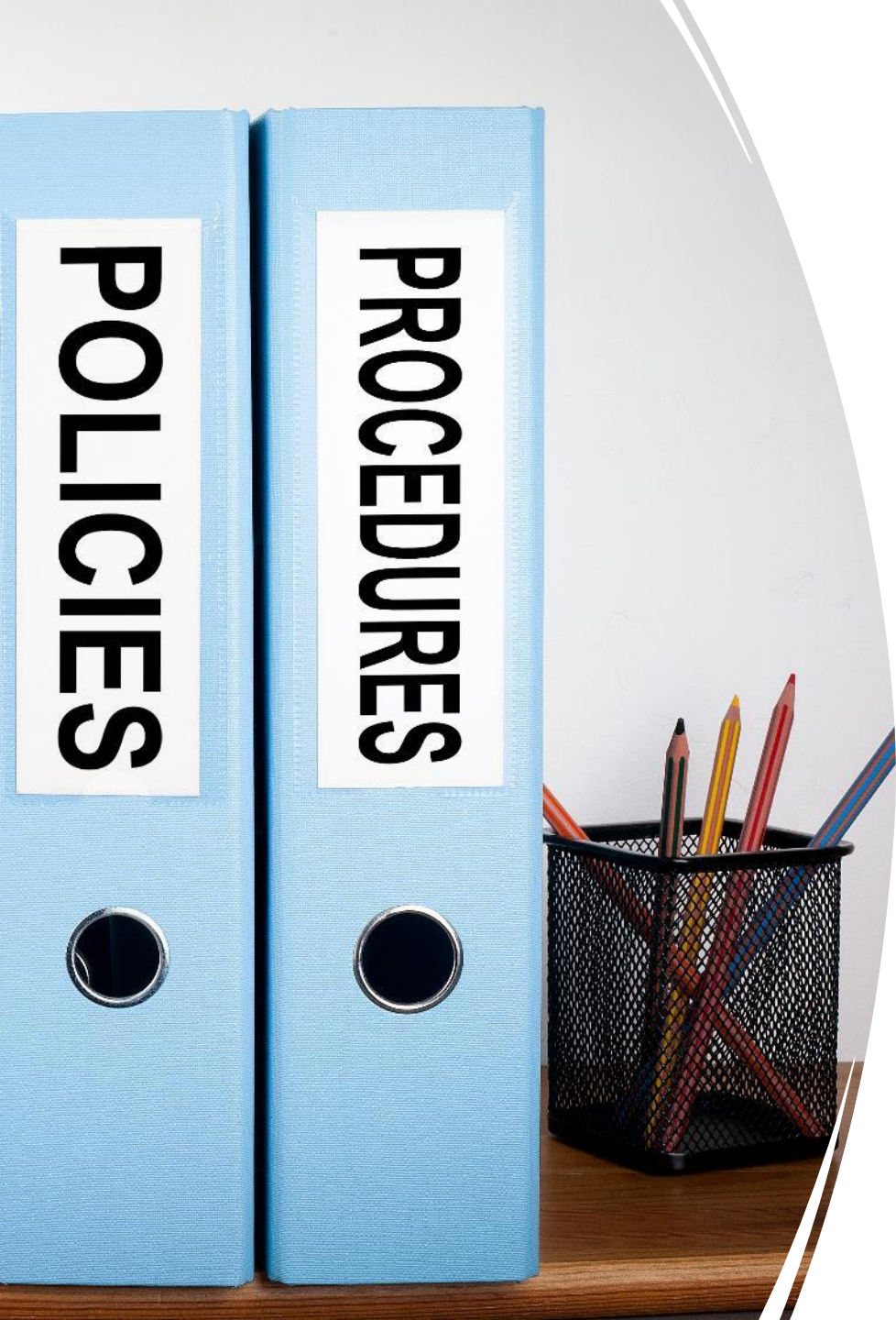


https://floridarevenue.com/Forms_library/current/dr5.pdf

501(c)(3) Application

- IRS Form 1023 – Filed electronically - <https://www.pay.gov/public/form/start/704509645>
- Recommend using the Charter School Guide Sheet
- Biggest holdup: Management Companies
- Be prepared with: *Articles of Incorporation, Amendments to Articles, ByLaws, Nondiscrimination Policy, Budget, Charter Application / Contract, Board member resumes, Procurement Policy, Segregation of Duties Policy*
- Fee: \$850
- Waiting Period: 180 days





Policies & Procedures 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



Complete Sample Policy Manual
<https://charter.support/document/policy-manual/>

Initial Policies to Consider

General

- Non Discrimination
- Anti-harassment
- Volunteer

Board

- Public Comments
- Establishing Agendas
- Conflict of Interest

Employment

- Compensation
- Evaluations
- Holidays
- Discipline
- Conduct Expectations

Student

- Attendance
- Behavior
- Dress Code
- Grades/Homework
- Acceptable Use

Business

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

Electronic Documents & Storage

- Think about process and tools
- Email, Document Sharing, Collaboration
- Google, Microsoft, Others?
- Be sure you investigate archival systems
- Other Tools:
 - Dropbox, Evernote, Boomerang, Monday.com, Others?



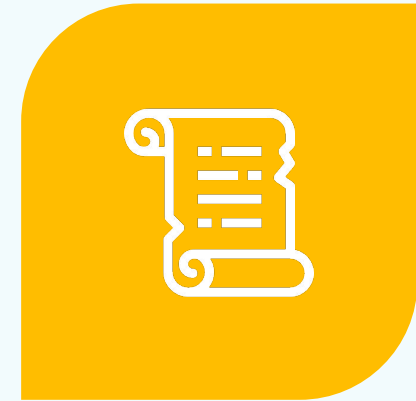
Systems Management



THINK THROUGH HOW
THINGS CAN BE MOST
EFFECTIVE



TAKE MORE TIME THE
FIRST TIME TO SETUP A
PROCESS



HARD COPIES OR
ELECTRONIC?

EXAMPLES: BOARD MEETINGS, OFFICE DOCUMENTS, STUDENT RECORDS

End of Operating as a Business

**Any Questions about
Operating as a
Business?**

Next up:

Contract Negotiations

Contract
Negotiations

The Charter Contract

Statutory Considerations

Contract Recommendations

Live by the Contract

The Charter Contract

- An essential document directing your operation
- Extremely important you understand the contract
- “Negotiations” are complicated.



Know Your Charter Contract Webinar
charter.support/webinar/know-your-charter-contract/

Statutory Considerations



1002.33 specifies contract negotiation requirements

- **Standard Contract:**

- The Department of Education shall provide ... a ... standard charter contract... The charter and charter renewal contracts shall be used by charter school sponsors.

- **Flexibility:**

- ... Any term or condition of a proposed charter contract that differs from the standard charter contract adopted by rule of the State Board of Education shall be presumed a limitation on charter school flexibility. The sponsor may not impose unreasonable rules or regulations that violate the intent of giving charter schools greater flexibility to meet educational goals...

Statutory Considerations

70 Days After Approval:

- The sponsor has 30 days after approval of the application to provide an initial proposed charter contract to the charter school.
- The applicant and the sponsor have 40 days thereafter to negotiate and notice the charter contract for final approval by the sponsor unless both parties agree to an extension.

Mediation:

- The Department of Education shall provide mediation services for any dispute regarding charter contracts



Charter Contract Recommendations



Carefully read and understand everything before agreeing



Contract will restate statute, and further restrict operations



Attorney - expensive but worth it



Remember you will live with the terms for the next 5 years

**End of The
Charter
Contract**

**Any Questions
about the Charter
Contract?**

**Next up:
Facilities**

Facilities

Realistic Expectations

Your Search

Mistakes to Avoid

Pricing

Funding

Financing



**Facilities: the #1
cause for opening
late**

Realistic Expectations

- Most charters are not able to open in their permanent location
- What do you need now?
- Have a goal for future needs
- Renting versus buying





Starting Your Search

- You're already running late
- Determine your target neighborhood
- Build your team (*realtor, ESP, etc.*)
- Determine your requirements
- Classrooms, size, price, etc.



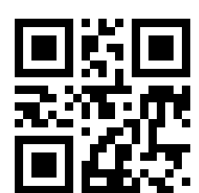
Webinar: Charter School Facilities 101
charter.support/webinar/charter-school-facilities-101/

Mistakes To Avoid

- Wrong People & Order
- Wrong Sizing
- Flawed Thinking
- Expectation Errors
- Occupancy Assumptions
- Control Assumptions
- Attorney Engagement
- No Backup Plan
- No Reference Checks
- Wrong Questions
- Denial - Presumed Malice



Webinar: 12 Facilities Planning Mistakes... That You Won't Make
<http://csu.li/4>



Search Tips

- MLS / LoopNet
- Network
- Churches
- Shopping Centers
- Apartment Complexes
- Community Centers



Pricing



Look for & beware of escalations



Cost Factors Year 1-5



Target: \$1,000 per student(ish)

Facilities Funding

- Nothing specifically for new school facilities
- Capital Outlay does not start until year 3
 - Criteria:
 - Been in operation for 2 or more years*
 - Clean annual audit
 - Satisfactory student achievement
 - Receive sponsor approval
 - Serve students in non-district facilities
 - Estimated at approximately \$580 per student



FLDOE Capital Outlay Website

<https://www.fldoe.org/schools/school-choice/charter-schools/business-finance-accounting/capital-outlay-funding.html>



Financing

- Turn-key lease
- Sources of financing
- Current versus Future Needs



**End of
Facilities**

Any Questions about
Facilities?

Next up:
Marketing &
Messaging

Marketing & Messaging

Enrollment is Essential

New School History

Marketing Tips

Get Your Message Out

Decisions

Website Requirements

Enrollment is Essential

- Funding is per student
- Each student is about \$6,785*
 - Average Elementary is \$7,623
- Meeting your enrollment targets is difficult
- Most charters open with less than expected
- Average 1st year Charter Schools enroll 198 students (*166 if top & bottom 5% outliers are removed*)

** Each student receives different funding based on the district, special education, grade levels, etc.*

Don't use the \$6,785 for actual budgeting!



New School Enrollment Histories

Average Enrollment by Year of Operation

Year 1	Year 2	Year 3	Year 4	Year 5
198	279	319	339	360

Based on the schools opening between 2001-2020

First Year Enrollment Changes Over Time

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Students	162	143	167	192	161	197	181	230	224	253	222	259	270	293	268	?
Schools	40	22	53	41	56	77	74	70	50	37	23	34	27	32	28	49

Marketing Tips and Tricks

- What is your message/brand?
- Develop talking points/elevator pitch (30s, 60s, 3-5min)
- What makes your school unique?
- Why will parents choose your school over others?



Webinar: If We Build It, They Will Come – Or Will They?
charter.support/webinar/charter-school-marketing-101/



Sample Style Guide
<http://bit.ly/csu-style>

Get The Message Out



Developing your Brand



Consider: Colors, Fonts,
Designs



Being consistent increases
professionalism and
recognition



Decide How You Want To Market

- Brochures/Fliers
- Website
- Social Media
- Events/Open Houses
- Paid advertising
 - Newspapers, TV, Radio, Web marketing, etc.

Website Requirements

Use it as a tool for communication & compliance



- School's grade and academic performance
- Names of governing board members
- Programs at the school
- Any management companies, service providers, or education management corporations associated with the school
- School's annual budget
- Annual independent fiscal audit
- Minutes – on a quarterly basis – of governing board meetings
- Parent liaison name and contact must be posted prominently on the charter school's website
- Fortify FL
- Grade Level Capacity – updated every 12 weeks
- Seat Availability – updated every 12 weeks
- Out-of-Field teachers listed within 30 days before the beginning of each semester
- Online educational service PII Information. This notice must include a link to the online educational service's terms of service and privacy policy, if publicly available.
- Special Magistrate Process*
- Custodian of public records is for the school and how to contact that person **



Website Requirement Checklist

<https://charter.support/document/charter-school-website-checklist/>

Website Tips

- Make a good first impression
- Ease of Management versus Cost
- Decide on the purpose
- Be sure design matches purpose
- Use your branding
- Keep it current
- Accessibility



Webinar: Effective Website Design

https://charter.support/webinar/web_design/



**End of
Marketing**

**Any Questions
about Marketing?**

Next up:

Student Enrollment

Student Enrollment

Develop a Timeline

When are Families Looking?

Sample Timeline

Considerations

Maintain Relationships

Develop an Enrollment Timeline

- Develop timelines for when marketing will start
- When lotteries will be held
- When you will notify parents.
- Florida Statute 1002.33(10)(b):
 - The charter school shall 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.



When are Families Looking?

- When does your district have open enrollment?
- When are families “shopping”?
- Be sure you’re visible during those times
- January is a statistically high time to push for enrollment
- Track your applications on a weekly basis with your marketing efforts



Sample Enrollment Timeline

- Jan. 1 – Registration Packet Available
- Apr. 1 – Applications due for Lottery #1
- Apr. 3 – Lottery #1 Conducted
- Apr. 8 – Parents notified of lottery results
- May 13 – Applications due for Lottery #2
- May 15 – Lottery #2 Conducted
- May 20 – Parents notified of lottery results
- June 10 – Family enrollment packets available





Student Enrollment Considerations

- Develop Processes
- How will you accept applications?
- How will you run the lottery?
- How will you notify parents?
- How will you track students?
- How will you monitor your enrollment?



Enrollment Tracker

<https://charter.support/document/enrollment-tracker/>

Maintain Relationships

- You're asking families to put a lot of trust in you
- Maintain communication
- Keep families engaged
- Use Social Media



Webinar: Strategic Family Engagement Tools to Boost Student Recruitment and Retention

https://charter.support/webinar/family_engagement/



**End of
Enrollment**

**Any Questions
about Enrollment?**

Next up:

Administration & HR

Administration
& HR

HR Policies

Planning Your Hiring

Finding an Administrator

Succession Planning

HR Policies & Procedures



Compensation – salary scale



Select a Payroll Company or Employee Leasing Companies



10 vs 12 months



Resignation/terminations and late new hires.



Policies

Planning Your Hiring

1

Start early –
April/May

2

Hire with
your mission
in mind

3

Do not
overhire

4

If possible,
meet in July
to “bond”

5

Remember
you will need
subs too!

Finding Your School Leader

- Your School Leader can make or break you!
- Ensure their beliefs align with your mission and vision
- Are they self-motivated
- Do they believe that all students can achieve
- Are they experienced?
- Check their references
- Interview multiple times



Presentation: Finding the Right School Leader
<https://vimeo.com/864072152?share=copy>



Hiring Teachers & Staff

Develop Accurate Projections

- Be sure you know how many teachers you need
- Possibly wait to offer the position until enrollment supports
- Completely understand your budget prior to hiring
- Develop a competitive compensation package (salary, benefits, retirement, etc.)



Hiring Teachers & Staff

Develop a Hiring Process

- Where to post
- Tiered approach to screening and interviewing
- Developing questions and a rubric
- Understand certification requirements
- Present Offer Letter and Contract
- **Understand FLDOE Hiring Practices**
 - Conduct Level 2 background Screening
 - Conduct Employment History Checks
 - Screen Candidates Using FLDOE's 3 Screening Tools
 - **The Teacher Certification Database (BEC-PASS)**
 - **Professional Practices' Database of Disciplinary Actions Against Educators**
 - **The Disqualification List**



Hiring Teachers & Staff

Develop an Onboarding Process

- Collect payroll documents and develop employee file
- Websites for employment and benefit information
- Orientation for new employees
 - Overview of handbook
 - Tour of facility
 - Introductions to key staff
 - Trainings for online systems
 - Trainings for processes and procedures



Succession Planning

- Administrator turnover is common in the first few years of a charter school
- Be prepared for how you will handle a turnover
 - Groom new leaders
 - Ensure you have a comprehensive policy manual
 - Ensure all tasks can be completed by more than one employee
 - Checklist for when an employee leaves
 - Process in place if you need to hire a new administrator



Succession Planning Guide for Charter Schools

<https://charter.support/document/succession-planning-guide/>

**End of
Admin. &
HR**

**Any Questions
about Admin &
HR?**

**Next up:
CSP Grant**

CSP Grant

Qualifying

Multi-Stage Process

CSP Budgets

Documents to Prepare

Common Issues

Organization

A photograph of six light-colored wooden blocks arranged in a row on a wooden surface. Each block has a large, bold, black letter printed on its top face, spelling out the word "GRANTS" from left to right. In the background, a portion of a blue calculator is visible on the left side.

GRANTS

**CSP Grants:
\$850,000**

- Submitted a charter school application to a local school district using the Department's model charter school application and have:
 - Charter application approved by the district;
 - Charter application is pending; or
 - Charter application is denied and pending an appeal.

CSP: Multi-Stage Competition Process

Stage I Application

- Online application
- Completeness Review by Department staff
- Capacity Review by multiple reviewers
- Capacity Interview - up to 8 people can attend

Stage II – by invitation only

- Does not guarantee funding, but it is likely
- Additional Documents such as assurances, policies & procedures, indirect cost indication...
- Award Letters – DO NOT spend the \$ until you receive the award notice!

CSP Budgets

Do your homework!

Obtain 3+ quotes for larger \$ items

Double check your calculations

Check allowable costs

Indirect Costs –
varies by district
2.8%-3.0%

A man with a surprised expression, wide eyes, and an open mouth, wearing a white cable-knit turtleneck sweater, pointing his right index finger towards the text on the right. The background is a plain, light-colored wall.

CSP Documents to Prepare

- Planning Phase:
 - Non-profit Documentation
 - GEPA Plan (steps you will take to ensure equitable access)
 - Management Organization (MO) Questionnaire
- Implementation Phase:
 - Charter Contract
 - Signed Lease
 - Co-Location Questionnaire
 - Governing Board Bylaws
 - Board Approved Policy and Procedures Manual

Common CSP Issues

Non-Profit Documentation

- Articles of Incorporation
- Sunbiz printout

GEPA Plan

- Clearly delineates Equitable access, ESOL support

EMO/CMO Response

- School is decision maker
- EMO/CMO doesn't own materials

Signed Lease

- Must have physical address
- If default, district must be able to obtain materials

Co-Location Questionnaire

- Co-locating creates additional headaches
- Everything must be separated

Governing Board Bylaws

- Quorum must be >50%
- No compensation must be clear

Common CSP Issues (Part 2) 😊

Procurement Policy

- Multiple bids/quotes
- Written justification for sole-source procurements

Enrollment / Admissions Policy

- School specific (if you operate multiple, no cross-preferences)
- Enrollment windows
- Exceptions: Siblings, founding board, staff kids
- Non-discrimination

Conflict of Interest Policy

- Follow the law – make sure you have a clear policy in place

Segregation of Duties Policy

- Specify by position all financial tasks
- 2 or more people for:
 - cash receipts, purchase approval (+\$750)
- Check signers do not maintain ledger or reconcile

Organization is Key

- Build a system
- Keep 3 quotes / prices for each item
 - Print/Save as a PDF and keep them
 - May be required for budget prep now
- Develop a package for each purchase:
 - Quotes
 - PO
 - Invoice
 - Check
 - Bank Statements
 - Packing Slip
- Maintain your Inventory
- CSP Tracker Tool



Document: Property Inventory

<https://charter.support/document/2397/>



**End of
CSP Grant**

Any Questions
about the CSP
Grant?

Next up:
Accounting

Accounting

Startup Costs

Your First Year

Record Keeping

Redbook

Reporting

Audit

Startup Costs

- No guaranteed/reliable sources of funding exist
- Private funding
- Loans - Be sure you are documenting!
- CSP Grants





Your First Year

- FTE –Some Districts pay monthly others semi monthly
- If you reach 75% of your projected enrollment you should receive 100% of the FTE starting in July
- If you are paid more than your enrollment – DO NOT SPEND IT!
- FTE Deadlines are essential – inaccurate reporting will cost the school \$
- Local Funds
 - Referendum Money
- Federal Funds
 - IDEA (For special Education)
 - Title 1 (For low income)
 - Title 2 (For professional development)
 - Title 4 (Student Support and Academic Enrichment Grants)



Record Keeping

- Financial Mismanagement is the #1 cause of school closures!
- Starts the moment you receive your charter
- Keep detailed records: Digital or paper?
- Spreadsheet might suffice now
- Start Understanding Redbook Basics:
FUND-FUNCTION-OBJECT
- Establish a Chart of Accounts that will be used in your ledger AND your budget.

Classifying Expenses

Type of Purchase	Fund	Function	Object
Classroom supplies (i.e. crayons, paper, glue) for a general education classroom.	100 General Fund	5100 Basic Instruction	510 Supplies
Janitorial supplies (i.e. mop, Lysol, toilet paper and soap for bathrooms).	100 General Fund	7900 Operation Of Plant	510 Supplies
Exterminator service charge	100 General Fund	7900 Operation Of Plant	390 Non-Prof Services
Paying registration fee for a teacher to attend a conference	100 General Fund	6400 Staff Training	730 Dues and Fees
Materials for the ESE Classroom (such as manipulatives, therapy putty, etc.)	100 General Fund	5200 Exceptional Education	510 Supplies
Substitute Teacher to cover for a teacher out sick (part time sub)	100 General Fund	5100 Basic Instruction	750 Other Personnel
Substitute Teacher to cover for a teacher attending a conference (part time Sub)	100 General Fund	6400 Staff Training	750 Other Personnel
Purchasing Pizza for a class as a result of reaching a fund raising goal	791 Internal Fund	5100 Basic Instruction	510 Supplies
Computers as part of a federal planning grant	420 Fed Program	6400 Instructional Tech	643 Cap. Comp. Hardware



Document: CSU Chart of Account

<https://charter.support/resources/chart-of-accounts/>



Document: FLDOE Red Book

<https://www.fl DOE.org/core/fileparse.php/7507/urlt/REDBK.pdf>

Redbook: Function Codes

- Refers to the objective or purpose of an expenditure:
 - **Instruction (5000s)** The activities dealing directly with the teaching of pupils or the interaction between teacher and pupils.
 - **Instructional Support Services (6000s)** This includes administrative, technical, and logistical support to facilitate and enhance instruction.
 - **General Support Services (7000s)** Those activities associated with establishing policy, operating schools and the school system, and providing the necessary facilities and services for the staff and pupils.
 - **Community Services (9000s)** Community Services consist of those activities that are not directly related to providing education for pupils in a school system.

Redbook: Object Codes

- Object means the goods purchased or the service obtained.
- There are eight major object categories provided in the Red Book manual:
 - Salaries (100s)
 - Employee Benefits (200s)
 - Purchased Services (300s)
 - Energy Services (400s)
 - Materials and Supplies (500s)
 - Capital Outlay (600s)
 - Other Expenses (700s)

Classifying Expenses

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Financial Reporting

- New schools must report monthly
- Monthly reports start when contract is approved
- State requires that all schools use the state format
- Your contract may require additional formats
- The required format is not helpful for operations
- Try to automate the process for creating reports



**End of
Accounting**

Any Questions about
Accounting?

Next up:
Further Training
Opportunities



Additional Training Available!

- **Launch Year** training is a series of Florida-specific trainings provided for free to school leaders:
<https://charter.support/all-trainings/csu-courses/new-school-institute/>
- Meets 1st Monday of every month to discuss time sensitive items beginning November 6, 2023 at 10:00 AM EST
- Webinars available at:
<https://charter.support/all-trainings/webinars/>