

Buckle Up for School Start-Up: Know What You Don't Know (Yet!)

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PEDRO CARREÑO, INNOVATE PUBLIC SCHOOLS
MALLORY DWINAL, OXFORD DAY ACADEMY
SHARA HEGDE, ALPHA PUBLIC SCHOOLS
DENA KOREN, EDTEC



Introductions



Pedro Carreño

*Senior Program
Manager, Innovate
Public Schools*



Mallory Dwinal

*CEO, Oxford Day
Academy*



Shara Hegde

*Chief Schools
Officer, Alpha
Public Schools*



Dena Koren

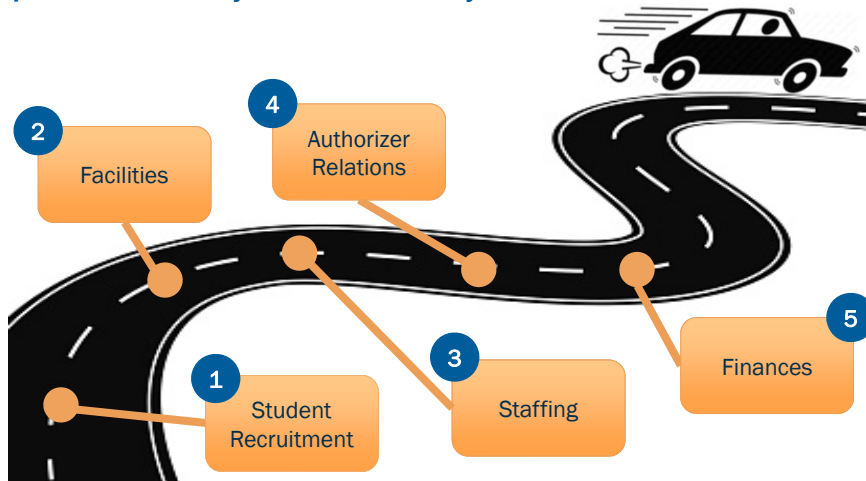
*Director of Client
Management,
EdTec*

Tell us about yourselves!

Ready, set, go!



Where are the most important places new school leaders could hit potholes on the way to a successful Day 1?



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Learning Objectives

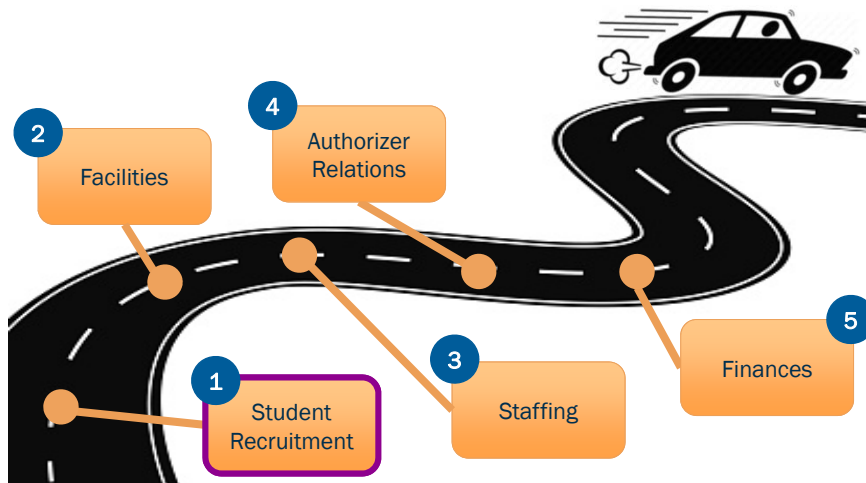


- 1 **Student Recruitment:** Describe several best practices and key missteps in recruiting and enrolling students
- 2 **Facilities:** Identify the options for a facility, steps involved in each type of facility, and potential roadblocks in the process
- 3 **Staffing:** Learn a set of strategies for finding, onboarding, and engaging your founding staff
- 4 **Authorizer Relations:** List actionable steps you can take to build a strong and lasting relationship with your authorizer
- 5 **Funding:** Recognize the most critical financial risk areas in your first years of operation

Ready, set, go!



Starting with student recruitment



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Student Recruitment: Develop a Strategy Early!



Plan should include timing, funnel, team, outreach, and engagement

Timing

- Start as early as possible, even before authorization!

Funnel

- Interest → apply → enroll → attend
- Best practice: over-enroll by ~10-20%

Team

- Parents are the best recruiters
- Invested parents = quick mobilization

Outreach

- Community relationships & presence
- Be where your parents get their info

Engagement

- Monthly touchpoints with interested or enrolled families

Outreach/engagement: What ideas do you have?

Sample Family Touchpoints

```
graph TD; Nov[Nov: Literacy Night] --> Dec[Dec: Winter Carnival]; Dec --> Jan[Jan: Coffee Chat]; Jan --> Feb[Feb: Museum]; Feb --> Mar[Mar: Summer Camp Fair]; Mar --> Apr[Apr: STEM Night]; Apr --> May[May: Play Date]; May --> Jun[Jun: Ice Cream Social]; Jun --> Jul[Jul: Dinner & Movie]; Jul --> Aug[Aug: Kickoff Picnic];
```

Sample Outreach Tactics

- Table at events
- Grocery store, library, park
- Church bulletin or pulpit
- Local radio shows
- House meetings
- Local feeder schools

Ready, set, go!

Let's talk about facilities... a charter leader's biggest worry

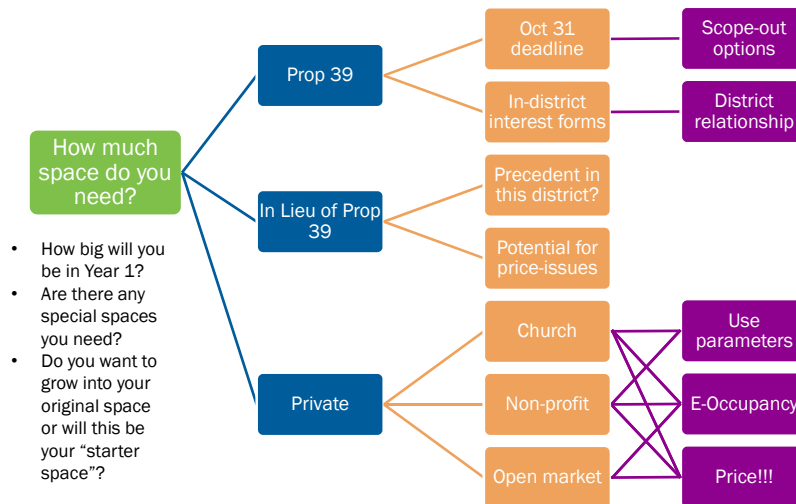
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graph LR; 1((1)) --- SR[Student Recruitment]; 2((2)) --- F[Facilities]; 3((3)) --- S[Staffing]; 4((4)) --- AR[Authorizer Relations]; 5((5)) --- Fin[Finances];
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Navigating Facilities Acquisition



How will you engineer a miracle?



If you think a private facility is your best bet...



Approach it like you have two authorizers

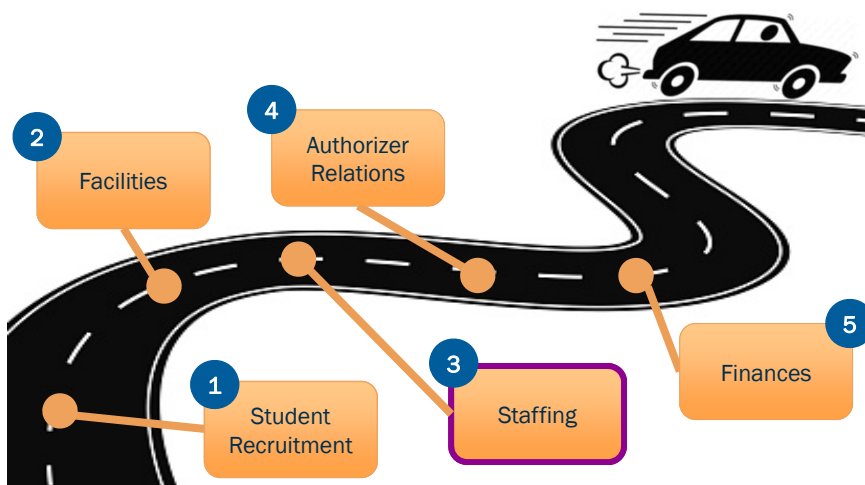
1. Line up an architect, even before authorization
2. Understand zoning and process to get E-Occupancy in your area
3. Need sign off from local agencies, like City Planning Office, Building Office, and potentially Design Review Board – find out who these are in your community!
4. **Goal:** Conditional Use Permit and/or Certificate of Occupancy

You likely need ~9-12 months to complete!

Ready, set, go!

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The right founding team will be your engine

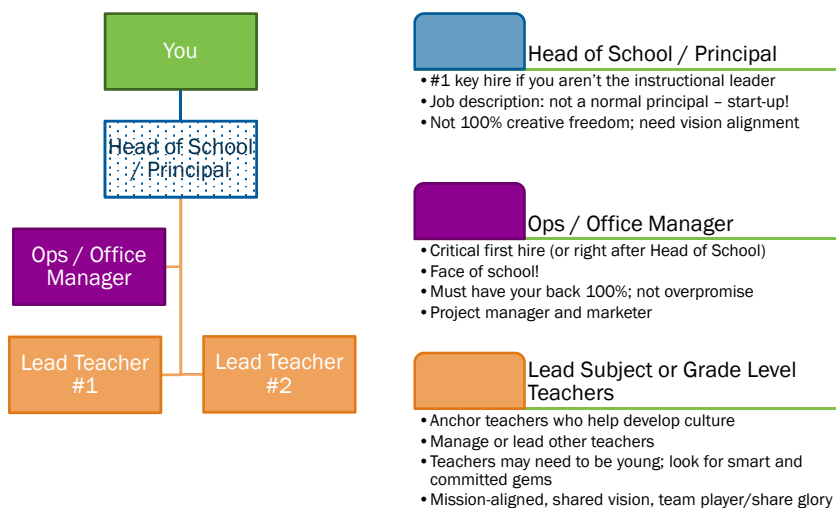


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Founding Org Chart – Critical Partners!

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Who will be your co-captains and main crew on this wild ride?



Other tips & tricks

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Lessons (and mistakes!) from the other side

1. Hire people as early as you can!

- You **get to know them** and see if they are good fit
- PCSGP can pay for some staff in Year 0 (~6 mo for admin, ~3 mo for ops/teachers)
- Consider having **team "pilot" program** at another school; philanthropists more likely to pay for actual work with kids

2. Be strategic about on-boarding

- Engage new hires** like new families – regular touchpoints!
- Send copy of charter or other **inspirational literature**
- Any articles or books that will help them **dig in on curriculum** is great

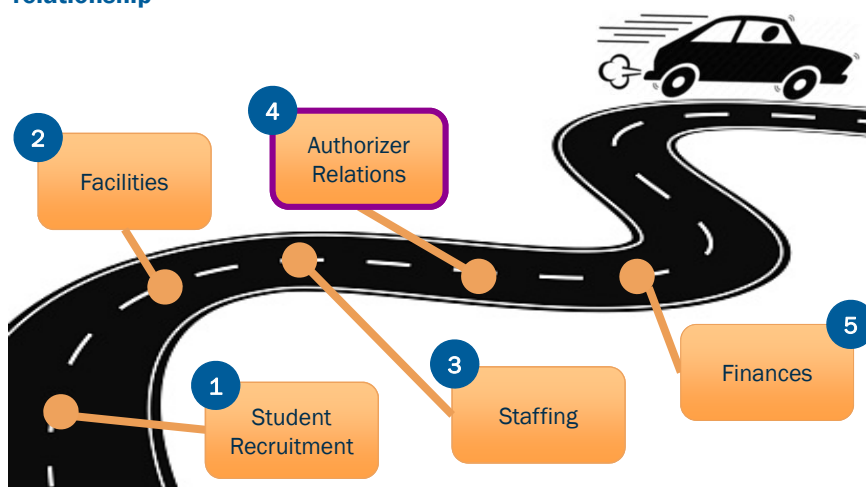
3. Don't neglect your core HR documents

- Job descriptions** not "normal" – need to adjust for start-up work
- Have lawyers play big role in **employee handbook** – lots you don't know!
- Draft **evaluation systems** early; easier to let someone go if you have system

Ready, set, go!

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No matter where you start, you can achieve a great authorizer relationship



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Relationship Checklist



Advice for developing a good relationship with any authorizer...

- ☒ Building good relationship is worth the investment... they could put you out of business if they wanted to (even if you're doing everything right).
- ☒ Your success is their success, and likewise for failure... if you position it like this, they may help you manage issues.
- ☒ Remember that you are dealing with people... make friends!
- ☒ Get a strong start... if you compromise later, you'll have built a solid foundation.
- ☒ Develop working norms around compliance and reporting.
- ☒ Don't let renewal be the only time the board hears from you!

Relationship Checklist – Special Edition



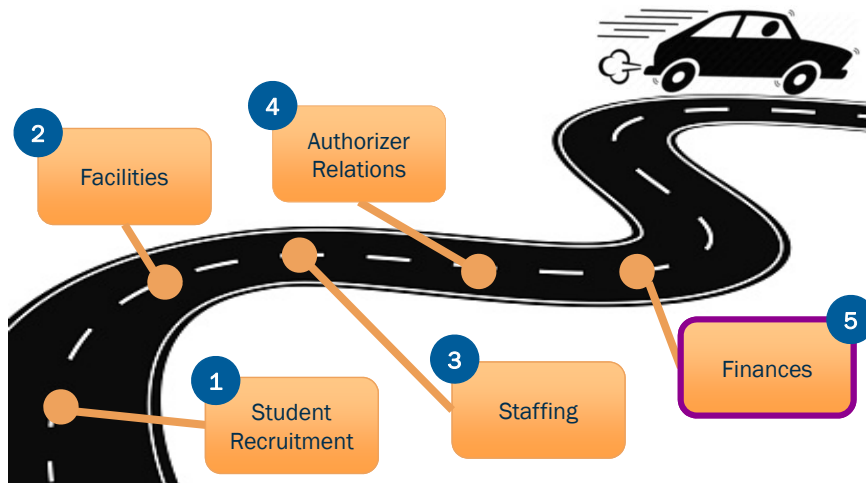
A few bonus ideas if your authorizer is your district...

1. Offer to let them read your charter and give you feedback
2. Think of ways you can partner, like PD or special programming (EL)
3. Remember that parent voice is the way of the day
4. Recognize that, no matter how you cut it, there will be a lot of politics...

Ready, set, go!

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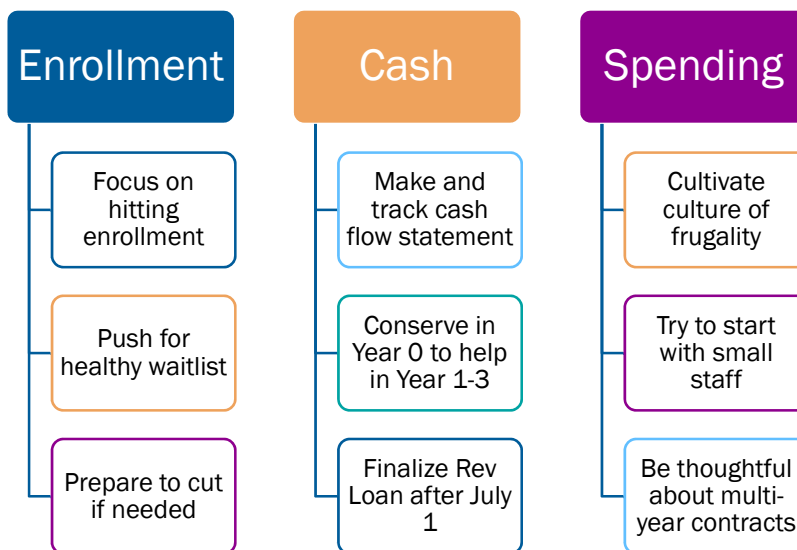
With the right navigation and maintenance, finances can support a smooth ride



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Three Big Topics: Earn More, Spend Less!

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Now... it's go time!

What would the experts do?

edtec



Student Recruiting & Enrollment



- You are handing out flyers outside a possible feeder district and a Principal/Teacher asks you to leave. What are your rights?
- Your enrollment is low for the new school year. How can you attract more students?

Facilities



- You are looking at a private lease. What should be considered?
- How many signatures do you need for Prop 39?
- What happens if you ask for too much in Prop 39 space?

Staffing



- How quickly can an employee start to work once the offer letter is signed?
- You hire a teacher from out-of-state and find out his/her EL authorization was rejected by CTC. What next?
- You are getting ready to let an employee go and they file a complaint about you to the board. What should you do?

Authorizer Relations



- Your authorizer gives you a 150-point checklist as part of your MOU, all of which needs to be complete before you open. Are they serious?
- Your authorizer schedules their annual site visit on the last day before Winter Break. What do you do?

Finances



- You know your cash will go negative a few months from now. What are your options?
- Why is CALPADS important?

Thank you!

ADDITIONAL QUESTIONS? CONTACT US:

Pedro: pcarreno@innovateschools.org
 Mallory: mdwinal@oxforddayacademy.org
 Shara: shegde@alphapublicschools.org
 Dena: dena@edtec.com



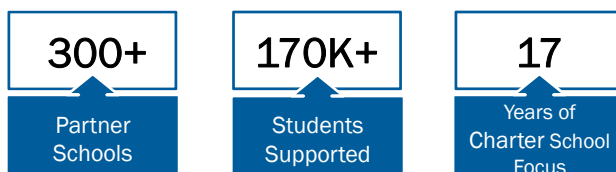
510.663.3500 • askus@edtec.com • edtec.com



About EdTec



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- A **mission-driven** organization, EdTec's social impact spans:



- A combined **380+ years of experience** with all aspects of charter school management.
- Known for **best-in-class** services:

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