


# All Clear for Take-Off: Know What You Need to Know for School Start-Up

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BUSINESS • OPERATIONS • PERFORMANCE

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## Introductions



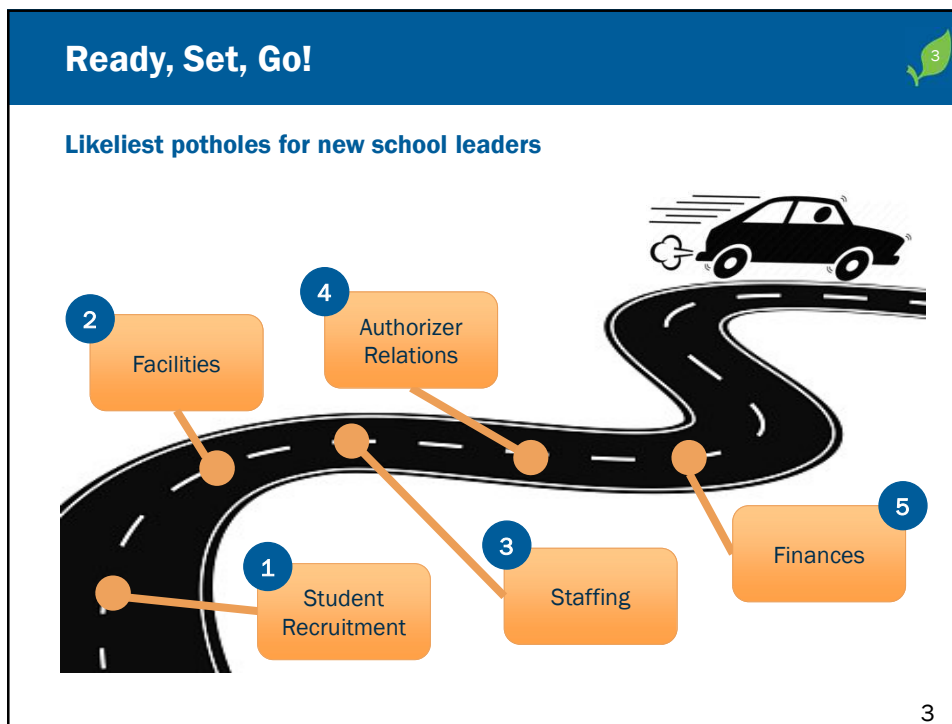
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*Founder,  
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**Dorothy Lee**  
*Director of Client  
Management,  
EdTec*

**Tell us about yourselves!**

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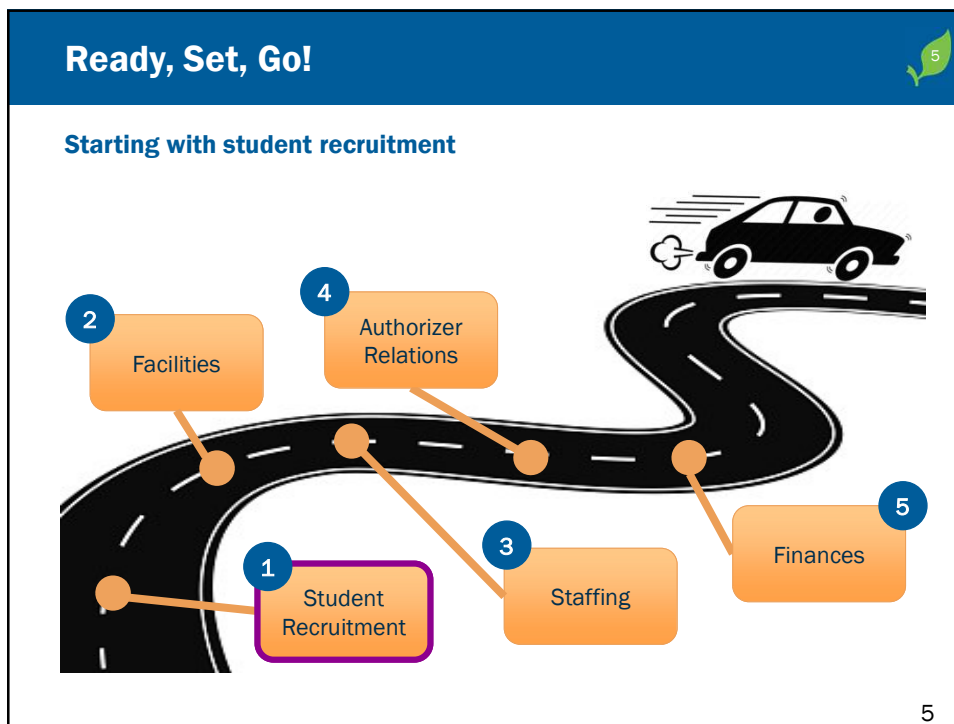
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## Learning Objectives

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- 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

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## Student Recruitment: Develop a Strategy Early!

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

<b>Timing</b>	<ul style="list-style-type: none"> <li>• Start as early as possible, even before authorization!</li> </ul>
<b>Funnel</b>	<ul style="list-style-type: none"> <li>• Interest → apply → enroll → attend</li> <li>• Best practice: over-enroll by ~10-20%</li> </ul>
<b>Team</b>	<ul style="list-style-type: none"> <li>• Parents are the best recruiters</li> <li>• Invested parents = quick mobilization</li> </ul>
<b>Outreach</b>	<ul style="list-style-type: none"> <li>• Community relationships &amp; presence</li> <li>• Be where your parents get their info</li> </ul>
<b>Engagement</b>	<ul style="list-style-type: none"> <li>• Monthly touchpoints with interested or enrolled families</li> </ul>

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## Outreach/Engagement: What Ideas Do You Have? 7

### 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

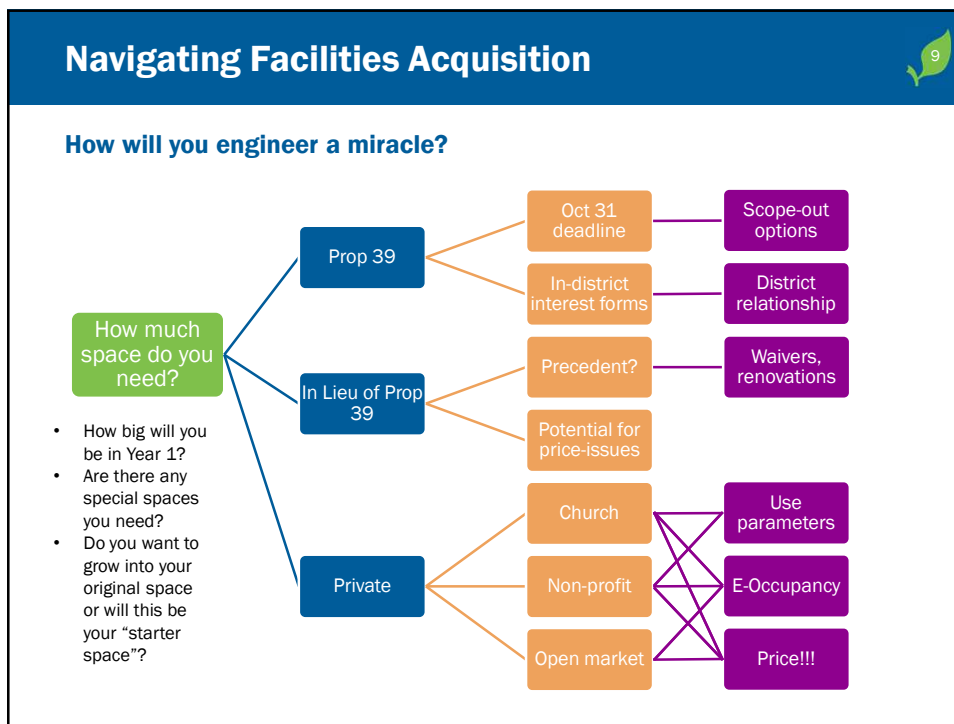
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## Ready, Set, Go! 8

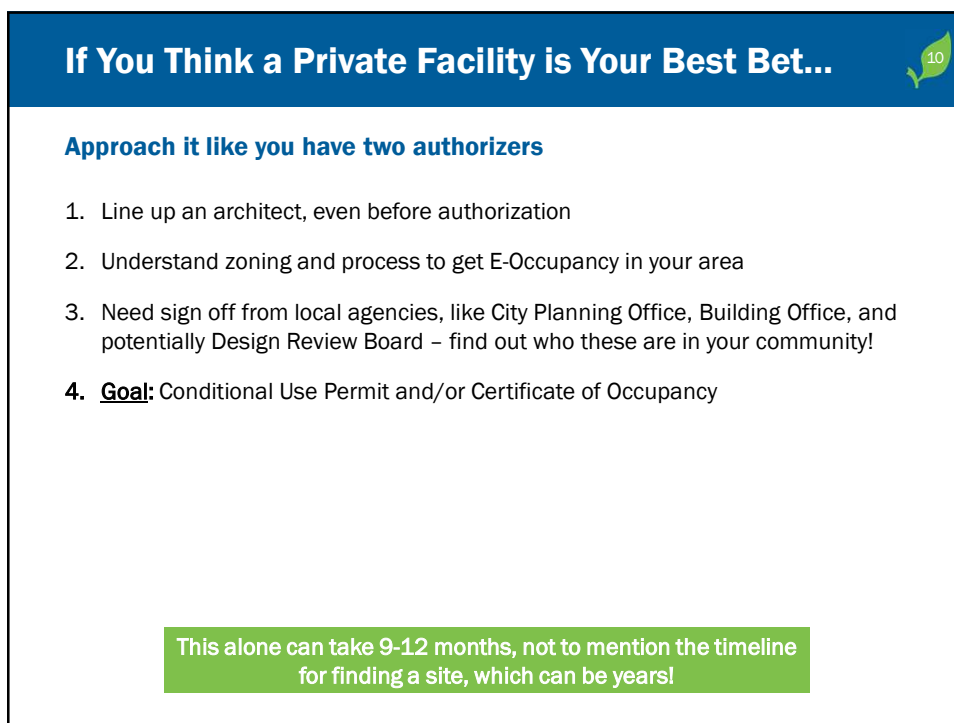
Let's talk about facilities... a charter leader's biggest worry

- 1 Student Recruitment
- 2 Facilities
- 3 Staffing
- 4 Authorizer Relations
- 5 Finances

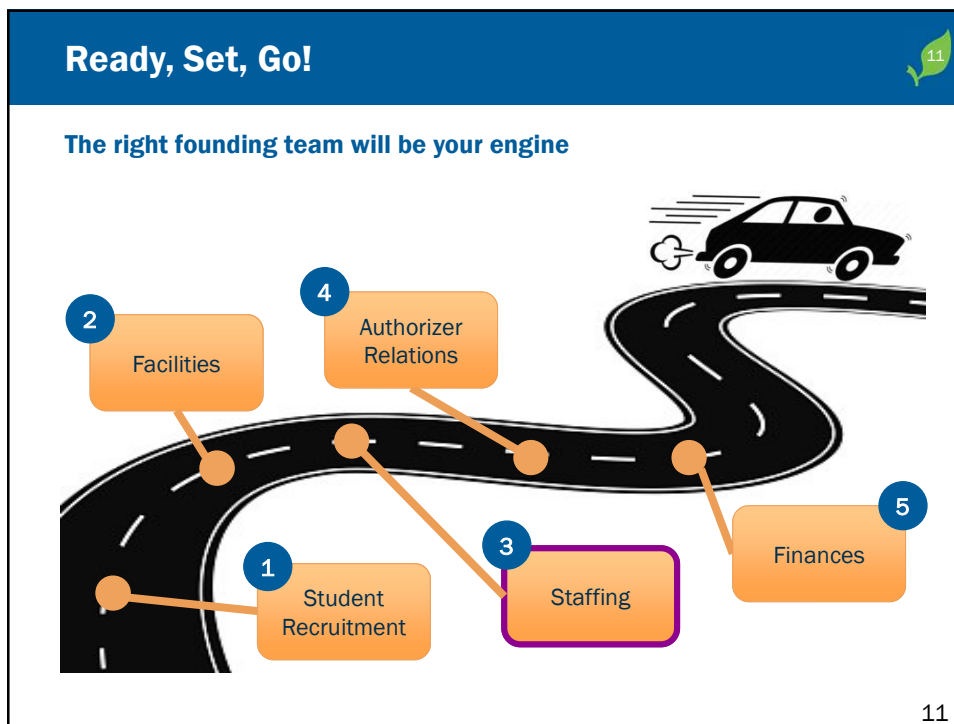
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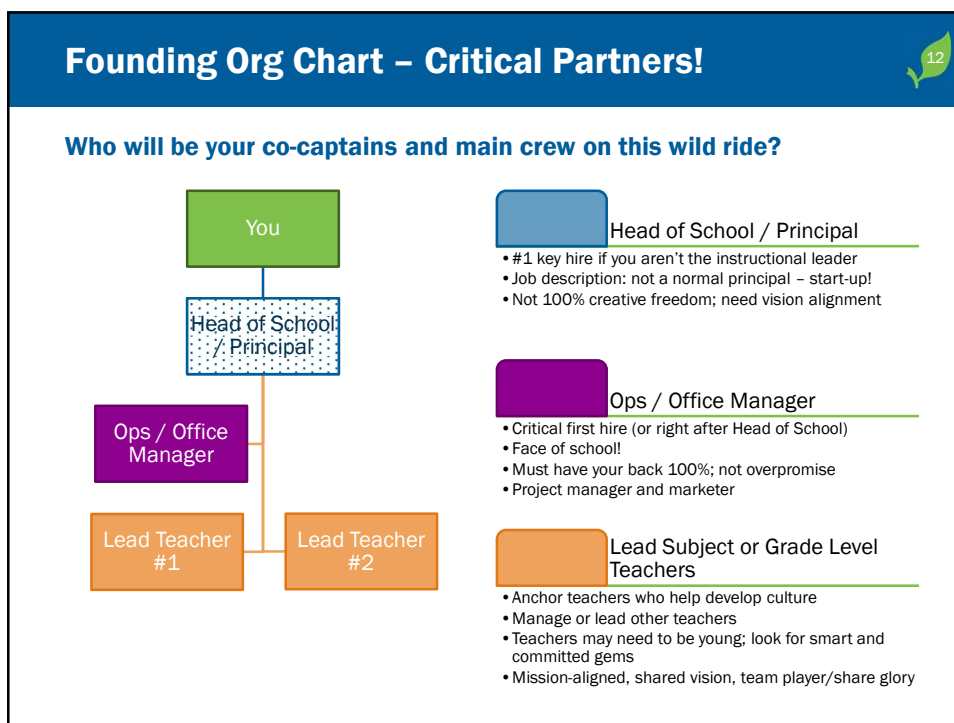
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## Other Tips & Tricks

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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

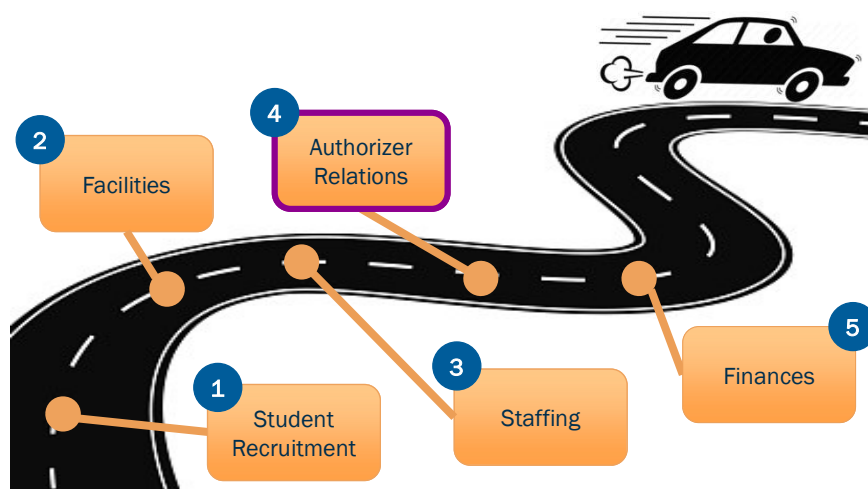
- Job descriptions** not "normal" – need to adjust for start-up work
- Have lawyers play big role in **employee handbook** – lots you don't know!
- Draft **evaluation systems** early; easier to let someone go if you have a system

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## 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 15

**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!
- Brainstorm ways to partner, like PD or special programming.
- Remember parent voice is the way of the day!
- Politics will play a role. Know who to befriend if your authorizer isn't helpful.

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## Ready, Set, Go! 16

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

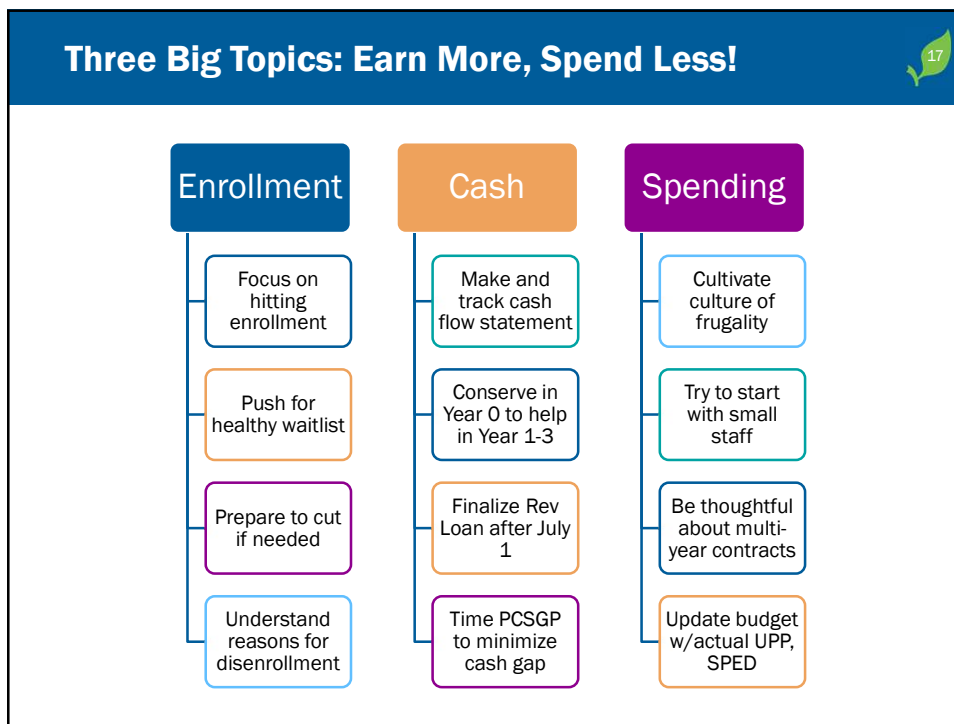
The diagram illustrates a winding road with a car driving on it. Five numbered callout boxes are connected to the road:

- 1 Student Recruitment
- 2 Facilities
- 3 Staffing
- 4 Authorizer Relations
- 5 Finances

The 'Finances' box is highlighted with a purple border.

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# Thank you!

**ADDITIONAL QUESTIONS? CONTACT US:**

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