

These questions are designed to help new charter school leaders evaluate potential consultants during the startup phase. While the specific needs of each school will vary, these core questions can help assess both expertise and fit across three critical areas: financial planning, legal compliance, and educational program design.

Strong consultants should be able to provide concrete examples from their work with other charter schools, demonstrate understanding of both startup and scaling challenges, and explain how they would adapt their approach to your school's specific context and mission. Use these questions as a starting point for deeper discussions about how potential consultants would support your school's development.

These questions:

- Focus on practical implementation rather than just theory
- Ask about specific systems and approaches
- Look for evidence of charter-specific experience
- Address both startup and long-term sustainability
- Probe for potential red flags

For Financial Consultant:

1. What is your experience specifically with charter school funding, including state funding formulas, federal grants like CSP, and managing multi-year financial projections for new schools?
2. What is your experience with submitting a 501c3 application?
3. How do you help schools develop contingency budgets and identify early warning signs of financial distress?
4. What systems do you recommend for financial controls and what role should the board finance committee play?
5. In our startup phase, how would you help us balance conservative budgeting with the need to invest in program quality?
6. Can you walk me through how you've helped other charter schools navigate facility financing?
7. What strategies do you recommend for managing cash flow in early years when many expenses hit before per-pupil funding arrives?
8. How do you approach building a financial dashboard that both the board and school leadership can use effectively?

For Legal Consultant:

1. What is your experience specifically with charter school law in our state, including authorization, compliance, and renewal?
2. How do you help schools develop compliant policies and procedures that are also practical to implement?
3. What are the most common legal pitfalls you see new charter schools encounter and how do you help prevent them?
4. How do you approach special education compliance and what systems do you recommend schools put in place from day one?
5. What is your philosophy on proactive legal risk management versus reactive problem-solving?
6. How do you help schools navigate employee issues and develop sound HR practices?
7. What is your experience with facility contracts and financing agreements for charter schools?

For Education/Curriculum Consultant:

1. How do you help schools translate their mission and vision into concrete instructional practices and systems?
2. What is your approach to curriculum selection and development? How do you balance purchasing versus creating materials?
3. How do you help schools develop effective assessment systems that provide actionable data without overtesting?
4. What professional development model do you recommend for new schools, especially in the planning year and first year?
5. How do you approach special education program design in a new school context?
6. What systems do you recommend for monitoring and supporting teacher effectiveness?
7. How do you help schools maintain program quality while scaling up grade levels?