

Twelve-Month Charter School Planning Year Task Timeline

This planning timeline is designed to assist charter school planning teams with important milestone tasks that should be accomplished during the twelve months before opening. Not all action items on this list need to happen in this order and you may already have completed some of the items, so consider this a general layout of what needs to happen prior to opening.

August

- **Authorizer**
 - Create/present a framework for measuring charter school(s) success
 - [WRCCS Charter School Performance Framework](#)
 - Align performance framework with charter school's performance measures
- **Governance Board**
 - **A Charter School governance board needs to be formed** Formation meeting
 - Articles of [Incorporation and EIN](#)
 - Officers elected
 - [Bylaws](#) drafted and approved
 - [TRCCS Bylaws](#)
 - [HMEC Bylaws](#)
 - 501c3 considered: [IRS Form 1023: Application for tax exemption](#) (Scholz Nonprofit Law)
 - Open a bank account if/when appropriate
 - Planning year budget approved
 - Planning year budget drafted and presented to the Governance Board
 - [Budget Calculator and Sample 5-year Budget](#)
 - Draft school performance measures and present to governance board for approval
 - [WRCCS Performance Measure Guide](#)
 - [WRCCS Reading and Math Diagnostic Guide](#)
 - Make sure [School Modification Form](#) is completed in order to access funds
 - Work with Jacqueline Jordy - jacqueline.jordee@dpi.wi.gov
 - Send out Request for Proposal for human resource services and financial services
 - SET-UP: [Register to receive aids payments](#) on the DPI website.
- **Classroom**
 - Draft Planning Year Plan
 - [Planning Document Template](#) (make a copy)
 - [Strategic Planning Design Document](#) (ISN)

September

● Governance Board

- Hire or appoint a charter school Planning Coordinator
 - [Example Charter School Project Coordinator Position](#)
- Create a 12-month board development plan to ensure board effectiveness
- Finalize Mission and vision statement for school
- Approve planning year School Performance Measures
- Make final decision on the contracting/hiring of HR services and financial services
- Ensure [Charter School Finance Procedures](#)

● Leadership/Design Team

- Begin Public Awareness Campaign - Hold community and parent focus groups to ensure public awareness and community-based design practices.
 - [Engaging Community in Design](#)
 - [Community Meeting Protocol](#)
 - Launch an accessible school website including application form, information on school mission, curricular methods, educational model, and vision for student learning outcomes
- Disseminate and review Parent/community surveys to better understand need
 - [Community Survey Questions](#)
- Make an announcement to teachers in local schools and the community as a whole explaining the need for a charter school and the initial charter school design. State that the team is seeking volunteers to join the Charter School Development Team
- Finalize Plan for Human Resources
- Revise proposed school budget for the first 3 years of operation with at least one contingency plan
- The school's leader has created a Wisconsin Access Management System (WAMS) Account. (This is required for access to the DPI's secure applications.
 - [WAMS Instructions](#)

October

- **Authorizer**
 - Ensure goals/measures for planning year for all charter schools in planning
 - Begin to discuss and plan for the Assurances of Readiness checklist review
 - [DPI Assurances of Readiness](#)
- **Governance Board**
 - Assessment Current State of the Board
 - [Founding Board Diagnostic Tool](#)
 - Begin to draft/revise/adopt Charter School and Board Policies
 - [Checklist for Charter School Policies](#) (Scholz Nonprofit Law)
 - [Sample Conflict of Interest Policy](#) (Scholz Nonprofit Law)
 - [Governance Board Policies Video](#) (Boardman and Clark)
- **Leadership**
 - Continue Public Awareness Campaign
 - Draft Application and Enrollment Process and Policy
 - [Equitable Enrollment Practices Guide](#)
 - [Zero Reject: Equitable Enrollment Practices](#) (KU)
 - [How can my Charter School Become More Diverse?](#)
 - [WRCCS Charter School Enrollment and Admissions Guidance](#)
 - [School Samples](#) (For Reference Only)
 - Create Application Window
 - Create Charter School Application
 - Procedure for accepting applications
 - Lottery Process
 - [Lottery Process](#) (For Reference Only)
- **Classroom**
 - Design team plans school visits to schools with similar models and innovations
 - Make a list of school site visits
 - [Peer Support Schools](#)
 - [WI Case Studies](#)
 - [WRCCS Primary School Education Models](#)
 - [Wisconsin Charter School Yearbook](#)
 - [WRCCS Design Innovations](#)
 - Create “Typical” Daily Schedule
 - Build ideal staffing/teaching matrix
 - Design staff/teacher Professional Development Plan
 - Draft Curriculum Map (Targets at grade level or competencies for graduation)
 - [Learning Target Library](#)
 - [DPI Academic Content Standards](#)

November

- **Authorizer**
 - (District-authorized only) Begin discussing plan with District Special Education Director special education services logistics to ensure FAPE
- **Governance Board**
 - (ICS only) Begin discussing plan for special education services logistics to ensure FAPE
 - [Special Education Funding Explained](#)
 - Begin drafting Charter Contract
 - Hire staff/consultants to do budget, enrollment, marketing, contract, facility, etc.
 - *CSP Grant - If the school wishes to apply for the charter grant, this workshop is highly encouraged. [DPI Charter School Grant RFP Opens](#)*
 - Draft Roles and responsibilities for Governance Board
 - [Charter School Governance Board Responsibilities](#)
 - [General Governance Board Member Job Description](#)
 - [Governance Board Legal Responsibilities Video](#)
 - [Birchwood Division of Duties](#)
 - [Valley New Administrative Tasks](#)
 - [TRCCS Governance Board Member Expectations](#)
 - [Birchwood Governance Board Flow Chart](#)
- **Leadership**
 - Continue Public Awareness Campaign
 - Create Marketing Plan
 - Begin to draft proposed budget for next first full school year of operation (July-June)
 - [Payment info letter](#)
 - [Budget Calculator and Sample 5-year Budget](#)
 - Meet with school finance personnel has occurred to ensure appropriate financial systems are in place and operational.
- **Classroom**
 - Visit facilities and buildings for school location and work to understand occupancy expectations
 - [Finding the Right Charter Space](#) (NCRC)
 - Create ideal staffing model
 - Create contingency staffing model

December

- **Authorizer**
 - Provide Template for contract (if applicable)
 - Hold Midway Check-in Presentation from Governance Board and leadership about the planning progress
 - School budget for the first 3 years of operation with at least one contingency plan
 - Staffing Matrix
 - Proposed student demographics and student count
 - Daily schedule
 - Draft of performance measures
 - For Authorizers planning to authorize a Virtual Charter, a [Virtual Charter School Information Form](#) must be completed no later than the prior January 31st
- **Governance Board**
 - Charter contract -Bring rough draft of charter contract to full governance board and authorizer for review and feedback
 - [Charter School Contract FAQ](#)
 - [Drafting Charter School Contract Worksheet](#)
 - [Drafting Contract Worksheet](#)
 - Determine enrollment capacity (grade level and overall)
 - Midway Authorizer Presentation about the planning progress (see December Authorizer Midway Check-in Presentation)
 - Ensure understanding of receive training for financial oversight
- **Leadership/Design Team**
 - A school district that wants to have a new virtual charter school to be listed on the 2021-22 open enrollment application, a [District Virtual Charter School form](#) (found on the [DPI virtual charter school page](#)) must be received by the DPI on or before JANUARY 31. A charter school contract needs to be approved in order to enter into the open enrollment system. Virtual charters can submit the contract after the January date but will not be listed in the OPAL system until an approved contract is received by DPI.
 - Research Student Information System and Student Learning Management System
 - [Procuring an LMS](#)
 - Continue Public Awareness Campaign
 - Midway Authorizer Presentation about the planning progress
- **Classroom**
 - Design classroom space and create a needs list for classroom furniture
 - Create a needs list for technology and or other supplies essential for school program operation

January

- **Authorizer**
 - For Independently Authorized Charter Schools (ICSSs), the authorizer must notify the state superintendent of their intention to establish a charter school by FEBRUARY 1 (letter)
 - For Authorizers planning to authorize a Virtual Charter, a [Virtual Charter School Information Form](#) must be completed no later than the prior January 31st
- **Governance Board**
 - Make recommendations for new board members
 - [Board composition Worksheet](#)
 - [Get Your Board Ready to Recruit New Board Members](#)
 - [Prospective Board Member Questions](#)
 - [Steps for Better Governance Board Recruiting](#)
 - [Board Matrix for Recruitment](#)
 - [Finding the Right Board Members](#) (Board on Track)
 - [Birchwood Governance Board Skills Matrix](#)
 - Continue drafting charter contract based on stakeholder feedback
 - Share draft with WRCCS and DPI for initial feedback before signing
 - Assess effectiveness of governance board meetings
 - [Board Meeting Assessment](#) (WRCCS)
 - [Board Meeting Calendar](#) (Board on Track)
 - [Governance Board Director Report Calendar](#) (WRCCS)
 - [Running Effective Board Meetings](#) (NCSI)
 - [Fix Your Board Meetings Video](#) (Board on Track)
 - [Charter Governance Board Meeting FAQs](#) (Board on Track)
 - Adopt a Governance Board meeting schedule for the school year.
 - [Board Meeting Calendar](#)
 - [Governance Board Director Report Calendar](#)
- **Leadership/Design Team**
 - Open the student application window and begin collecting applications
 - Create Request for Proposal for school insurance (liability) coverage
 - Build recommended School Academic Calendar (include assessment calendar and breaks)
 - Create Teacher and staff job descriptions
- **Classroom**
 - Create an ideal staffing model. Create procedures to ensure all staff are appropriately licensed, have been reviewed and all personnel records are complete.
 - Licensing - Julie Hagan - Julie.Hagen@dpi.wi.gov

February

- **Authorizer**
 - Provide feedback on Contract
 - Share learning and charter school performance expectations framework
- **Governance Board**
 - Begin to draft [ESSA LEA Plan](#) due June (Independently Authorized Schools Only)
 - Begin drafting a Governance Board Handbook
 - **Example:** [Kaleidoscope Academy Board Handbook](#)
 - Monitor Application Process
 - Align Charter Contract to [DPI/WRCCS Benchmarks](#) and send to DPI for review
 - Vote to adopt School Academic Calendar (include assessment calendar and breaks)
 - Vote to approve school insurance (liability) plan
 - Consider creating Governance Board subcommittees that align with strategic plan
 - [Leadership Evaluation Committee](#) (BOT)
 - [Finance Committee](#) (BOT)
 - [Academic Excellence Committee](#) (BOT)
 - [Birchwood Curriculum and Instruction Committee](#)
 - [Fund Development Committee](#) (BOT))
 - [Birchwood Fundraising Committee](#)
 - [Governance Committee](#) (BOT)
 - [Birchwood Recruitment and Retention Committee](#)
- **Leadership/Design Team**
 - Post staff position openings on WECAN, with WRCCS, and via other outlets
 - *For schools opting to submit a charter grant, [DPI Charter School Grant RFP Closes](#)*
 - Create Community and Parent Involvement Plan
 - [Community Involvement Logic Model](#)
 - Present school insurance coverage plan to board
 - Finalize contract for student management system
- **Classroom**
 - Create Special Education model and staffing matrix
 - [Special Education Plan Template](#)
 - Create plan for EELs
 - Begin ordering materials and furniture for the fall
 - [Inventory Template](#)

March

- **Authorizer**
 - Provide feedback on contract
 - Governance board and authorizer board vote to approve charter school contract and authorizer will sign
 - District authorized schools: Ensure that FAPE will be met based on staff planning
- **Governance Board**
 - ICSs: Ensure that FAPE will be met based on staff planning
 - [Special Education Resources](#)
 - Make revisions to charter contract if necessary
 - Present school budget draft for the following academic year.
 - Governance board and authorizer board vote to approve charter school contract and authorizer will sign
 - In order for a school to be issued a school code (and open in fall), a charter contract needs to be approved and received by DPI no later than JUNE 30
- **Leadership/Design Team**
 - Get school code from DPI based on the completion of [School Modification Form](#)
 - Reach out to the following teams/people at DPI to ensure charter school will meet all requirements and law (District Authorized charter schools should work with district):
 - Special Education Accountability Team
 - Sarah Okonkwo & Margaret McMurra
 - State Performance Plan, APR, LEA Determinations
 - Nancy Fuhrman - nancy.fuhrman@dpi.wi.gov - 608-266-6438
 - Special Education Funding
 - Rachel Zellmer - Rachel.Zellmer@dpi.wi.gov
 - Licensing
 - Julie Hagan - Julie.Hagen@dpi.wi.gov
 - Title Funding
 - Matt Baier - Matthew.Baier@dpi.wi.gov
 - Food and Nutrition
 - Karrie Isaacson - karrie.isaacson@dpi.wi.gov
 - Accountability
 - Jon Wong - Jonathan.Wong@dpi.wi.gov
 - WISEdata, expectations and milestones
 - Jeff Perry - Jeffery.Perry@dpi.wi.gov
- **Classroom**
 - Special Education referral/due process/child find practices in place.
 - Build a plan for extracurricular activities/clubs/sports

April

- **Authorizer**
 - Check in with charter school on student enrollment numbers
- **Governance Board**
 - Finalize [ESSA LEA Plan](#) due June (Independently Authorized Schools Only)
 - Design/adopt/revise Disciplinary Policies
 - Review school budget draft for the following academic year.
 - Adopt school policies
 - Student Behavior (suspension, expulsion, bullying,
 - Attendance
 - Technology (proper use)
 - Complaint
 - [Charter School Policy Manual](#)
 - [Charter School Policies](#)
 - Hold an enrollment lottery and send out an initial round of letters of acceptance for student enrollments. Create a waitlist or begin the next lottery window if holding a second lottery.
- **Leadership/Design Team**
 - Receive School Code from DPI (charter contract must be signed by authorizer/governance board and approved by DPI)
 - Present school disciplinary procedures to inform policy
 - Create a Staff Handbook (expectations for interactions with students/parents, response to student behavior, response to crisis, professional development, cell phone usage, etc.).
 - Launch Student Management System
 - Begin sending out enrollment paperwork
- **Classroom**
 - Create Food Service Plan (charter schools are not required by law to provide school lunch)
 - Post Teacher and staff job descriptions for upcoming school year for any positions not yet filled
 - Consider attending WRCCS Charter School Development Day
 - Draft student schedules to understand if/when students may be participating in learning off campus (other schools, college, work, other services, etc.)
 - School Culture Plan that aligns to mission/vision of school
 - Behavior Expectations
 - Perceptions
 - Culture
 - Events
 - Measurement tool

May

- **Authorizer**
 - Hold a readiness meeting with Leadership and Governance Board to ensure school can open in fall
 - Complete Authorizer Assurances of Readiness Document
 - [DPI Assurances of Readiness](#)
- **Governance Board**
 - Have a readiness meeting with Authorizer
 - Approve School Budget for following academic year
 - *Charter Contract should be complete, however, In order for a school to be issued a school code (and open in fall of 2021), a charter contract needs to be approved and received by DPI no later than JUNE 30th each year*
 - Ensure a Governance Board recruitment plan
 - [Sample Board Orientation Plan](#) (BOT)
 - [Board Orientation Manual](#)
- **Leadership/Design Team**
 - Send out Request for Proposals for pupil transportation (charter schools are not required by law to provide pupil transportation)
 - [Charter School Transportation](#)
 - Have a readiness meeting with Authorizer
 - Begin to work on [Final Checklist for Opening](#)
 - Hire teachers and staff for upcoming school year (offer employment contracts and set up to begin payroll)
 - Incorporate [Educator Effectiveness](#) plan with the school staff professional development plan State Statute [115.415](#) (**may need to contract out for this service**)
 - Create Leadership Duty Matrix (Distributed leadership model)
 - [Roles and Responsibilities Sheet](#)
- **Classroom**
 - Design Parent Involvement Plan
 - Design Student Assessment Plan and Calendar/Schedule
 - [ELA and Math Diagnostic Tool Assessments](#)
 - Confirm the school has a transparent way to report learning to include Student Information System (SIS) to transfer student information to the DPI.
 - Finalize grading and/or a system for reporting of student learning

June

- **Authorizer**
 - Holds a readiness meeting to ensure school can open in fall
- **Governance Board**
 - Hold Governance Board retreat to set goals and a plan for the upcoming year
 - [Kaleidoscope Retreat Agenda Example](#)
 - [Strategic Planning or Business Planning](#) (Mosaic)
 - [Strategic Planning Template](#)
 - [Strategic Planning Infographic](#)
 - Parent Involvement Plan Approved
- **Leadership/Design Team**
 - Ensure [Final Checklist for Opening](#) is complete
 - Create a school security and safety plan (site safety team, phone tree, crisis plan).
 - Procedure for using volunteers in charter school
 - [Educator Effectiveness](#) plan and staff professional development State Statute [115.415](#)
 - Request enrollment paperwork for all transferring students (health forms, credits, permissions, IEPs, files, etc.)
- **Classroom**
 - Hold parent meetings and open house
 - Staff Professional Development
 - Onboard the Student Information System (SIS)
 - Send out initial parent communications and articulate plan for ongoing parent communication

July

- **Authorizer**
 - Hold final readiness meeting to ensure school can open in fall
 - Inform school if there is any unmet item in the Readiness checklist they need to address prior to opening
- **Governance Board**
 - Approve Parent/Student Handbook
 - Approve school security and safety plan (site safety team, phone tree, crisis plan).
 - Approve procedure for using volunteers in charter school
 - Draft Governance Board Handbook
 - [Kaleidoscope Governance Board Handbook Draft](#)
 - [Birchwood Governance Board Handbook](#)
- **Leadership/Design Team**
 - Hold parent meetings and open house
 - Ensure Special Education Meetings happen prior to start of the school year
- **Classroom**
 - Food service procedures are in place or food service vendor contracts have been signed
 - Ensure all applicable health, facility, and safety inspections have been completed by the appropriate authorities.
 - Ensure technology plan is working (SIS, LMS, apps, firewalls, security, etc.)
 - Build Student Schedules
 - Create Field Study (Outside of School) Learning Plan
 - Staff Professional Development
 - Plan the timeline and launch of student/staff behavior expectation system complete with tools or rubrics for surveying, assessing and measuring the school culture

August

- **Authorizer**
 - Final Walk-through visit
 - Sign the assurances document (and submit to DPI if the school is a subgrantee)
- **Governance Board**
 - Final Walk-through
 - Hold Open House for families
- **Leadership/Design Team**
 - Review [Final Checklist for Opening](#)
 - Ensure all enrollment paperwork is transferred or filled in (health forms, credits, permissions, IEPs, files, etc.)
- **Classroom**
 - Hold parent meetings and back to school night
 - Ensure student/parent handbooks, policies and procedures and other materials are ready for families, staff and students.
 - Confirm transportation arrangements,
 - Plan for who unlocks/locks school doors in (AM and PM). Keys are distributed.
 - Develop a first-two-week plan (assembly, communication, student/staff on-boarding, pre-requisite skills training, etc.) designed proactively to set the stage for a positive school year.
 - Create Student IDs
 - Staff Professional Development
 - Hold all IEP meetings prior to start of school