

# Thirteen Steps to Opening a Charter School in Florida



## **Step 1 . . . DO YOUR HOMEWORK**

- Read and understand the Florida Charter School Law (Florida Statutes 1002.33).
- Read articles on charter schools
- Visit charter schools in Florida. Talk to the founding members.
- Attend state and local conferences on charter schools.
- Carefully review the Florida Charter School Application.
- Let your school district know that you are interested in opening a charter school. Request a copy of their policies and procedures on charter schools.
- Find out if your school district is under a desegregation order.
- Surf the net for resources. The U.S. Charter Schools website is a great place to start. [www.uscharterschools.org](http://www.uscharterschools.org)

**For technical assistance, please contact:**

**The Florida Charter Resource Center at USF (1-800-214-4247)  
University of South Florida, HMS401 - Tampa, FL 33620-8360  
[www.charterschools.usf.edu](http://www.charterschools.usf.edu)**

## **Step 2 ... CREATE THE CORE TEAM - Make it a Group Effort**

Include those who share your vision of a charter school:

- Writers - those who can put ideas on paper
- Educators - those who can take ideas and make them part of the educational process of the school
- Business managers - those with background/experience in business activities such as educational accounting, commercial real estate, banking
- Legal - retain or include legal counsel with knowledge of charter issues
- Community leaders - those who can provide revenue and support

*Avoid appointing persons to the permanent Board of Directors who may have a potential conflict of interest or the appearance of a potential conflict of interest.*

### **Step 3 ... ENVISION THE CHARTER SCHOOL**

Establish a mission for the school that is grounded in research or philosophical conviction and that addresses the legislative intent of the charter school law.

- What is the mission of your school?
- Who will the school serve?
  - Age/Grade Levels
  - Targeted Students
  - Number of Students
  - Geographic Area to be Served
- Where are these students being served now? If the school is converting from a traditional public school to a charter school, what alternative arrangements can be made for those students who decide not to attend the charter school?
- What will make the school a good choice for parents?
- What does the school have to offer to make it successful?
- What obstacles must be overcome?
- Conduct an informal survey – talk to families to understand what they want in a school

### **Step 4 ... CREATE THE SCHOOL DESIGN**

- What will make your school unique and innovative? How will your school increase learning opportunities for all students, with special emphasis on low-performing students and reading?
- How will the school design fit the overall mission and vision? How will your charter school
  - meet high standards of student achievement?
  - promote greater academic success and financial efficiency by aligning responsibility with accountability?
  - provide parents with sufficient information on whether their child is reading at grade level and whether the child gains at least a year's worth of learning for every year spent in the charter school?
  - analyze student data?
- Develop an innovative curriculum. The charter school **must** provide a reading curriculum that is consistent with effective reading strategies and grounded in scientifically based reading research.
- Develop unique instructional approaches.
- Identify community resources to assist the school.
- Create plans that identify, minimize and protect others from violent or disruptive student behavior.
- Develop plans to ensure the safety and security of students and staff.
- Develop strategies for parental involvement. These strategies should include:
  - Input, comment, and/or participation in the school's operations or governance.
  - Lines of communication between the school's governing board or management team and parents.
  - Methods for handling disputes between parents and the school.
- Bring all stakeholders together for input.
- **Before proceeding, develop consensus among founding board members.**

#### **Step 5 ... SUBMIT THE CHARTER APPLICATION**

- Notify your school district of your intention to submit a charter school application.
- Applications are due to the district on September 1.

## Step 6...CREATE A PLANNING BUDGET & IDENTIFY OTHER FISCAL CONCERNS

- The Charter School Revenue Estimate Worksheet can be found at <http://www.firn.edu/doe/fejp/chartinst.htm>. This will be an essential tool as you plan your budget.
- Develop a planning budget around the following considerations:
  - How many students?
  - Number of students at each grade level? Keep Florida's constitutional class size amendment in mind.
  - Types of Students
    - Disabilities (Matrix levels)
    - Gifted
    - "At Risk"
    - ESOL (English for Speakers of Other Languages)
    - Other
- Identify grants for which you may be eligible. Any school applying for a Federal Charter School Implementation Grant from the Florida Department of Education must attend the Department's Federal Charter School Implementation Grant Workshop.
- Identify categorical funds for which your school may be eligible.
- Estimate your first year expenses.
- Develop a monthly cash flow analysis.
- Develop a three year to five year budget and include planned enrollment increases.
- Investigate obtaining a line of credit from a local lender.
- Establish fiscal policies/procedures:
  - Segregate duties of management
  - Identify separate check writers/signers
  - Establish asset accountability processes
  - Implement cash controls
  - Develop purchasing procedures
- Contact these resources for assistance with revenue and expense projections:
  - **Florida Charter Resource Center** (1-800-214-4247)
  - **Local School District Finance Officer**

## **Step 7 . . . CONSIDER THESE FACTORS IN YOUR FIRST YEAR BUDGET**

- 5% administrative fee to school district
- Salary/benefits
- Facility costs
- Renovations to facility
- Utilities (electric/phone, initial service and ongoing monthly fees)
- Insurance (professional liability, general property and fire)
- Textbooks/curriculum materials
- Computers
- Transportation
- Food service
- Contracted services (counseling, special needs, computer repair, etc.)
- Accounting services/Legal Services
- Audited financial report
- Custodial services
- Printing – brochures, student handbooks, etc.
- Advertising
- Supplies (office/classroom)

## **Step 8 . . . MATCHING THE FACILITY TO THE VISION**

- Contact your city or county office to learn about zoning considerations.
- Contact a realtor to locate available space in your targeted geographical area
- Visit other charter schools to get ideas regarding facilities
- Spaces to consider:
  - Churches
  - Strip shopping centers
  - Office buildings
  - Modular classrooms

- Estimate timetable for facility modifications (if required)
- Gather costs estimates on facility modifications. Keep in mind:
  - ADA requirements
  - State fire codes for educational facilities
  - Health/safety requirements
  - Local building code requirements
- Determine how difficult it will be to get a certificate of occupancy
- Other issues to consider:
  - Adequate play space
  - Appropriate zoning or ability to change
  - Sufficient parking
  - Accessibility for safe unloading of school buses
  - Presence of hazardous materials, asbestos, lead paint, contaminated soil

**Step 9 . . .WRITE AND SUBMIT A QUALITY CHARTER SCHOOL APPLICATION – DEADLINE IS SEPTEMBER 1ST**

- Use the **new** Florida standard charter application as a guide or obtain the charter application provided by your school district. The Florida standard charter application is available at <http://www.firn.edu/doe/choice/charter.html>.
- Review approved charter school applications from other schools.
- Establish writing committees.
- Meet early with your district superintendent, district staff and board members to demonstrate evidence of community interest.
- Prepare a short presentation for school board members and district staff, if allowable.
- Present copies of your charter application to the school district, as required. Remember, the due date for applications is September 1.

**Step 10 . . . ONCE YOUR CHARTER APPLICATION HAS BEEN APPROVED, BE PREPARED FOR THE UNEXPECTED**

- Charter schools are responsible for providing transportation for students residing

within a 'reasonable distance' of the charter school. Policies must be in place to help ensure that transportation is not a barrier to equal access for all students.

Transportation options:

- Contract with your school district to provide transportation within a 2-4 mile radius.
- Contract with your school district to lease a bus. You will have to provide your own bus driver and all necessary insurance. Bus drivers must be trained by your school district.

Before you proceed with any of the three options below, contact the Florida Department of Education Transportation Office at 850-245-9795.

- Contract with private provider
  - Contract with parents
  - Public transportation
- Food services – contract with your local district, private food vendor or restaurant.

Remember:

- Meals for students receiving free or reduced price breakfast and lunch must meet federal guidelines (for complete information, please visit the Florida Department of Education Food and Nutrition Management Office website at <http://fnm.doe.state.fl.us/>)
  - Before entering into a contract with a private food vendor or restaurant, contact your school district or the Florida Department of Education Food and Nutrition Management Office to ensure that you are following appropriate procedures.
- Other food service factors to consider:
    - Keep milk cold
    - Keep food warm
    - Keep food handling and dining areas sanitary

## **Step 11. . . COUNTDOWN TO SCHOOL OPENING**

### **GOVERNANCE**

- Transition from informal to formal governance.
- Identify criteria for hiring a principal and begin the search.
- File nonprofit Articles of Incorporation with Florida Secretary of State.
- File for fictitious name, if school name differs from corporation.
- Obtain federal employer identification number (allow 4 weeks, if applying by mail).
- Apply for Florida sales tax exemption.
- Apply for 501 (c) (3) exempt organization status with IRS.
- Set up a bank account for the operating budget.

### **FACILITIES**

- Finalize facility plans.
- Secure facility.
- Confirm quotes, work schedules for all renovations, build out, new construction and obtain appropriate permits.
- Schedule inspections:
  - Local building
  - Public School District (if required)
  - Certified fire inspection
  - Health code
- Obtain Certificate of Occupancy following required inspections.
- Purchase furniture and equipment:
  - Check with the school district regarding surplus equipment and furniture.
- Arrange for storage of equipment/furniture until facility modifications are complete.
- Allow for technology installation. Contact your school district to inquire about appropriate technology for student data, etc.

- Arrange for housekeeping and maintenance of facility.
- Set up classrooms.
- Create a teacher work area.
- Set up offices, order phone service and internet service.

### **Step 12 . . . ON YOUR WAY TO BEGINNING OPERATIONS**

- Order curriculum and instructional materials. Any reading curriculum selected must be a scientifically research based program. Remember to allow 4-6 weeks for materials to arrive.
- Develop final school calendar.
- Develop student information system/establish FTE audit procedure.
- Develop medical first-aid resources
- Develop student handbooks and have them approved by the charter school governing board.
- Establish fire drill, tornado, hurricane and other emergency procedures and evacuation plans. Students in modular classrooms must be evacuated to permanent structures
- Provide security for student records (e.g. fire retardant cabinets)

### **STUDENT CONSIDERATIONS**

- Develop student application.
- Implement recruitment strategies:
  - Place flyers in public places, supermarkets, homeowner mailboxes and apartment complexes.
  - Place ads in newspapers.
  - Speak about your school to civic groups, churches, preschools.
  - Send out brochures, applications, and registration information to prospective parents.
- Identify the steps that will be taken to reach diverse student groups, including typically "hard to reach" families.

- Schedule an open enrollment period.
- Monitor applications for racial diversity.
  - Conduct targeted outreach for minority students to reach diversity goals.
- Enrollment lottery – establish lottery if over subscribed.
  - Use an impartial person to select students.
- Schedule student orientation/registration.
- Obtain student records from the student's previous school, after student has enrolled.
- Identify exceptional education students, review the IEPs, and develop a plan to provide required services and instructional considerations.

### **Step 13... TEACHERS/STAFF CONCERNS**

- Hire a principal.
- Develop organizational chart and job description(s).
- Develop a procedure for hiring teachers, paraprofessionals, and clerical staff.
- Develop and arrange for employee benefits (e.g. worker's comp., insurance, etc.).
- Advertise and recruit needed teachers and staff (hiring of school personnel should be based on student enrollment).
- Select certified/qualified teachers and staff capable of realizing established school mission.
- Set up a personnel file for each teacher and staff member.
- Conduct employee fingerprinting and background checks through school district.
- Conduct drug screening.
- Develop an evaluation procedure for all staff/teachers.
- Identify and arrange for staff development.

## **ARRANGE FOR CONTRACTED SERVICES**

- Consider the following services:
  - Therapy services for students with IEPs
  - Accounting/Auditing services/Legal services
  - Custodial
  - Business services
  - Transportation
  - Food Services
  - Employee/Staff leasing, if applicable
  - Psychological services, if applicable

## **PROVIDE TRAINING AND ORIENTATION FOR STAFF**

- Partner with district or develop training for the following:
  - Medication /administering
  - Bloodborne pathogens
  - Classroom management
  - Instructional strategies
  - Technology
  - Sexual abuse
  - Safety

Creating a charter school is an opportunity to establish a unique and innovative alternative to traditional public education programs.

The founding process is not unlike starting a small business. The Florida Charter School Resource Center is available to provide technical assistance and support throughout this process and beyond.

We hope this information helps you achieve your vision for a high quality Florida charter school that is a performance-based center of teaching and learning.

# FCSRC

The Florida Charter School Resource Center

**800-214-4247**

**[www.charterschools.usf.edu](http://www.charterschools.usf.edu)**