



DEVELOPING A SUCCESSFUL OPERATIONS MODEL

MICHIGAN FUTURE SCHOOLS

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Overview

This eBook details best practices for developing and refining a school's operations model.

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Chapter I: Charter, Board & Management

In the **Charter, Board & Management** section, school founders will learn about recommended practices to ensure the management of the school is in place prior to the opening. All levels of planning will be outlined. Frequent challenges of new schools will be addressed and possible solutions will be offered.

Topics addressed will include:

- Selecting, vetting and training a Board of Trustees
- Charter Acquisition
- Establishing a good relationship with the Authorizer
- Securing Start-Up Grants
- Selecting and establishing a partnership with a management company to support day-to-day operations of the school
- Developing Board policies/employee handbook/student-parent handbook
- Selecting service providers independent of the management company and completing service contracts, i.e., transportation, food service, including setting up free/reduced lunch reporting
- Establishing partnerships with institutions of higher education or education model providers, including wraparound service providers

Selecting, Vetting and Training a Board of Trustees

Selecting dedicated and committed Board members will be critical to the future of your school. Prior to submitting your charter school application to a potential Authorizer, you will need to carefully recruit and vet potential Board candidates. Select individuals who represent a broad range of professions and bring expertise to the Board through their professional experience in the following fields: finance, legal, education, higher education, health care, communications, media, politics, community service, and technology. Spend time with each candidate to make sure they understand the mission and vision of your school, the commitment required to serve on the Board, and are willing to participate in training. Each potential Board member will be required to participate in the Authorizer's approval process, and you will need to facilitate the process by following-up with each of them to complete application materials and submit required information by firm deadlines.

Board training is essential for leadership development and to understand the scope of governance responsibility. A credible source for Board training is the National Charter School Institute (NCSI). Through the NCSI training, Board members will participate in workshops and receive training to prepare them for a positive leadership experience. More information on the National Charter Schools Institute is available online at: <http://nationalcharterschools.org/governing-breakthrough-results/>

Charter Acquisition

In Michigan, universities, community colleges, intermediate school districts, and local school districts are able to authorize the charter of public school academies. If seeking a charter Authorizer, you will need to study each Authorizer's application process, timing, and requirements. There are several websites that list Authorizers and application deadlines:

- Michigan Association of Charter School Boards (MACSB) - <http://www.macsb.org/AuthorizersIndex.php>
- Michigan Association of Public School Academies (MAPSA) - <http://charterschools.org/olc/charter-school-authorization> (posts current Authorizer openings)
- National Association of Charter School Authorizers (NACSA) - <http://www.qualitycharters.org/policy-research/state-map/michigan/michigan-authorizers/>
- http://www.michigan.gov/documents/PSAQA_54517_7.pdf - The State of Michigan has a handy Public School Academy questions and answers document that provides a general overview of steps school operators must take to successfully open a new charter school.

Michigan University PSA Authorizers

- Central Michigan University - <http://www.thecenterforcharters.org/>
- Eastern Michigan University - <http://www.emich.edu/charterschools/>
- Ferris State University - <http://www.ferris.edu/HTMLS/administration/academicaffairs/charterschools/homepage.htm>
- Grand Valley State University - <http://www.gvsu.edu/cso/>
- Lake Superior State University - <http://www.lssu.edu/charter/>
- Northern Michigan University - <http://www.nmu.edu/charterschools/>
- Oakland University - <http://www.oakland.edu/psa/>
- Saginaw Valley State University - <http://www.svsu.edu/supo/>

Michigan Community College PSA Authorizer

Note: Community Colleges have the authority to authorize PSAs within their geographic boundaries, with the exception of Bay Mills Community College, which can authorize schools statewide (<http://www.bmcso.org/>)

Completed applications are often due in two parts with Phase I being due in mid-Fall, and school applicants selected for Phase II due in December or early January/February of the planning year. The best advice for preparing these applications is to start early and work with seasoned application preparers, such as the Michigan Future team or the National Charter Schools Institute to ensure success. Consult with the Authorizer to make sure you are preparing the application package to their specifications. Some Authorizers are very specific and particular about the document specifications and rubrics, others are more flexible. If your Phase II application is accepted, you will be invited to participate in an in-depth interview between your team and the Authorizer. You will need to demonstrate thorough knowledge of your academic program, operational capacity, facility plans, and firm financial foundations. You will also need to select and submit the names of your proposed Board members with your applications.

Upon charter authorization, plan to address compliance requirements on a continual basis. Authorizers each have unique accountability requirements which will be clearly established in the charter contract.

Once a charter office has selected your application, they will prepare a proposal for their Board's approval, usually in February or March of the planning year. Within 10 days after issuing a charter school contract, a charter school contract must be submitted to the Superintendent of Public Instruction. At this time, a school code will be issued and the school can begin operation.

Establishing a Good Relationship with the Authorizer

A significant part of selecting an Authorizer is determining a good fit between Authorizer expectations and oversight approach and those of the school founders, and ultimately, the school Board. Communication and accountability are the key to a good relationship with the Authorizer. You will be expected to ensure fidelity to the Authorizer's mission, vision and goals throughout all school operations. A field representative will be assigned to your school to work with you and ensure compliance. Expect quarterly and annual reporting requirements, including Authorizer-specific assessments and reporting mechanisms. Your Authorizer will guide you on how to ensure compliance. Expect them to review and ensure quality and compliance on your educational plan. They will also make sure all fire, safety, and health codes are met. And finally, they will work with your Board to ensure they operate independently of the Academy's management company.

As your school becomes established in subsequent years, your Authorizer will evaluate your achievement and determine if you need intervention or support to ensure success. Each Authorizer has a unique approach to quality assessment and control for which they will provide training.

Most importantly, the key to a good relationship with the Authorizer is trust. The Authorizer must believe that the school founder has the capacity to meet the established criteria for success and the school founder must believe that the Authorizer will be supportive throughout the planning, launch and implementation of the Academy. The needed trust is most often established through honest and straightforward discussions and information sharing. A trusting relationship will be a positive relationship.

Securing Start-Up Grants

If planning to submit for any start-up grants, such as the Michigan Department of Education (MDE) Charter School Planning/Design & Implementation Grants, refer to the MAPSA Funding Opportunities page (<http://charterschools.org/olc/funding-opportunities>) for current application timelines and requirements.

Most new charter schools apply for the MDE Planning/Design & Implementation Grant (http://www.michigan.gov/mde/0,4615,7-140-6530_30334_40088-244086--,00.html) which can fund up to three years (36 months), with no more than 18 months used for planning with funds up to \$100,000, and no more than two years (24 months) used for initial implementation of the new school. Funding available for implementation may equal \$200,000 for each year. Your school will be eligible to apply once you receive an initial approval letter from an Authorizer who plans to issue your charter. You will also need to have submitted a copy of a complete and statutorily compliant charter contract for review and processing to the MDE, or already have been issued a district code by the MDE.

The MDE Planning Grant application is very detailed. Make sure you plan for the time required to prepare and submit by the deadline. Furthermore, your team will need an authorized MEGS administrator who is skilled with online grants management to oversee the submission of the grant and financial oversight of the funds throughout the duration of the grant. Kim Sidel (517-373-3345) is the MDE contact for MEGS and grant administration. She is very experienced with helping school operators establish and oversee their MEGS accounts and grant requirements. The MDE has a resource page for school operators with guides and links: [MDE Grants Resource Page](#). Familiarize yourself with the required processes provided on this page, so you can work with your MEGS administrator to ensure all compliance measures are met.

Walton Family Foundation Start-Up Grants are available to charter schools planning to open in or near Detroit which plan to serve low-income students, and will serve Detroit students. Applicants need to work with MAPSA, which is the Walton Family Foundation grant partner on preparation and eligibility. Initial pre-applications are due in early January, with full application materials due late January. Interviews are in March and thorough preparation by your team is essential for success. Refer to [MAPSA's site](#) for more information on the [Walton Family Foundation Grants](#).

It is also important to note that start-up grants are critical to the financial viability of the school as it is launched. Specifically, state aid for the school will not be received until October 20 of the year in which the school opens. This is due primarily to the difference in fiscal years – the fiscal year for school districts begins July 1, while the state's fiscal year begins October 1. This difference means that new public school academies must plan carefully for the financial needs of the first few months of the school year. The MDE and Walton implementation grants will be important factors in managing cash flow concerns.

Selecting and Establishing a Partnership with a Management Company to Support Day-to-Day Operations of the School

It is highly recommended that the school Board contract with an expert school management company or educational service provider (ESP) to oversee staffing and operations. Support of facility management, personnel management, payroll and accounting, public relations and marketing, pupil services, curriculum development, instructional coaching, and professional development are all services that can be provided. Most service providers offer full-service support, or schools can select from a menu of services, as needed and depending on their unique capacity to provide some of these operational services themselves.

Your management company will be accountable to the charter Boards which will contract with them. The Board is responsible for setting policy, including operations goals, academic performance goals, and goals to ensure fiscal stability.

Your management company will be responsible for the schools data submissions to the state through Michigan's Center for Educational Performance and Information (CEPI). These include academic, staffing, and financial information. The Board will be required to hold all vendors, including those contracted by the management company accountable for the services they provide. Similar to the relationship with the Authorizer, the relationship with an Education Service Provider must be based on mutual trust and respect. The Academy Board of Directors makes policy for the Academy and enters into contracts for management of the Academy. It is essential the management company have the capacity and experience to implement the policies of the Board and provide the day-to-day management of the school that is needed to achieve high levels of student achievement. Careful vetting of management companies or education service providers is one of the most important responsibilities of the Academy Board. It is through this vetting that positive relationships and trust develop. The process is analogous to a traditional public school district Board of Education interviewing and appointing a Superintendent of Schools.

It's highly recommended that school founders investigate school management companies carefully, including by interviewing other schools about their satisfaction and experiences with their management companies.

Also recommended is to consult with MAPSA, which maintains an up-to-date [vendor list of management companies on their website](#).

Developing Board Policies/Employee Handbook/Student-Parent Handbook

It is recommended that school Boards work with the National Charter Schools Institute (<http://www.nationalcharterschoolsinstitute.org/>) on Board training and development of policies and handbooks. They have a well-defined process for developing charter school policies. The policies and handbooks of the Academy ultimately drive the success of the Academy. Without the direction and guidance of the Board of Directors as provided through policies and handbooks, the stability of the Academy will be in question. Clearly, appropriate goals and policies will provide the needed direction for your management company and the staff, students, and school families of the Academy. It is the fidelity to this direction that will ensure success of the Academy and its students.

Selecting Service Providers Independent of the Management Company and Completing Service Contracts, i.e., Transportation, Food Service, Including Setting up Free/Reduced Lunch Reporting

Visit the MAPSA Marketplace (<http://charterschools.org/member-services/marketplace>) online for a current list of vendors in Michigan. It is important to understand that even if you enter into an agreement with an Education Service Provider, it may also be necessary to enter into agreements with other specialized vendors. In some cases, the specialized vendors are under contract with the Education Service Provider. In other cases the Academy Board of Directors may enter into these agreements. As with any vendor, mutual respect and trust is essential for the relationship to work. A sound contract with your management company will identify how these other service contracts will be structured. It is the totality of the vendor relationships and their coordination that will ensure successful day-today management of the Academy.

Establishing Partnerships with Institutions of Higher Education or Education Model Providers, Including Wraparound Service Providers

As soon as you begin the planning process of opening your school, begin exploring partnership opportunities with colleges or universities. Look for partners who share your commitment to supporting college-prep experiences with your students, including campus visits and dual enrollment.

Community-based organizations can provide support to your students on social services, health care, athletics, and extracurricular activities.



Chapter II: School Leadership

In the **School Leadership** section, school founders will learn about recommended best practices to support the principal/school leader, including the essential components of creating a college-going culture where all adults are committed to student success.

Topics addressed will include:

- Supporting and providing orientation for the school leader to ensure he or she has the capacity to work effectively with all of the school's stakeholders and lead the instructional program of the school.
- Creating a system to assess all potential staff for fit and qualifications.
- Establishing classroom management and discipline expectations and training all staff.
- Creating an adult culture in which the adults of the school are empowered, accountable and committed. This includes the infrastructure/systems and development activities.

School Leader Orientation

It is widely acknowledged that the role of the school leader is paramount to ensuring the success and sustainability of new schools. However, the role of the school leader has exponentially evolved over the last several years and has become more demanding as a result of accountability requirements, decreased funding, and higher expectations on student performance. To that end, the school leader must receive the necessary training to further develop his/her current skills while cultivating additional competencies needed for leading a successful school. School founders should create a detailed orientation process aligned to the following categories:

- What are the duties and responsibilities of a school leader during the planning phase of a new school?
- What are the duties and responsibilities of a school leader during the first year of operation?
- What characteristics and skills are needed to be a successful principal of a new school?

Much of a principal's role remains rather abstract and is dependent on assessing one's environment and the ability to respond effectively to immediate, daily and long-term needs of all stakeholders. The school leader is expected to provide effective leadership, ensure the enactment of the mission and vision of the school, and courageously lead staff. Whenever there is an issue at or involving the school, it is the principal's responsibility to address it. Arguably, there are few other professional roles that require the individual be close to an expert on such a vast array of topics. The difficulty in designing an effective school leader orientation and support plan is in determining what the absolute priorities are in order to successfully launch a new school (through its planning phase and first three years of operation) while not overwhelming the individual to the point where he/she becomes unable to maintain the personal skills and decision-making

capacity needed on a daily basis. Therefore, the support provided should scaffold the school leader's learning according to prioritized areas as well as based on the leader's identified strengths and needs. Based on the information collected, a detailed work plan should be created and include the following categories:

- Academics
- Operations
- Leadership
- Staff Development
- School Culture
- Partnership Management

To best prepare the school leader to implement an effective academic program, school founders should focus on creating opportunities for school leaders to plan for and answer the following:

- How will I promote a culture of high expectations, continuous growth and responsibility for student learning?
- How will I work to demonstrate a commitment to academic rigor, relationships, and relevance?
- How will I identify and support effective instructional strategies?
- How will I communicate and use research-based best practices to support teaching and learning?
- How will I strategically use data to monitor student progress and drive instruction?
- How will I support my staff in systematically and effectively using data to improve student achievement?
- What learning walks, focused content conversations, and literacy and numeracy walk-through evaluations will I need to conduct?
- How will I organize and support the School Improvement Process? What other structures do I need to plan for and support in order to create a culture of continuous improvement?
- How will I promote numeracy and adolescent literacy in all content areas?
- What do I need to do/what will I do to increase my understanding of research-based practices designed to improve students' performance on the Explore, PLAN and ACT continuum.
- How will I facilitate the effective implementation of Common Core Standards?
- How will I help instructional staff identify and then support students who need interventions, including SPED and English Language Learners?
- How will I facilitate the development and implementation of common formative assessments in all content areas?

School founders should create an orientation and support plan to help school leaders plan for and answer the following questions related to effective school operations:

- What are effective uses of allocated resources to serve all students and ensure financial sustainability and how do I effectively plan for using the resources allocated for my school?
- Are the resource decisions made designed to improve student achievement?
- What is the process needed to allocate and use resources?
- What are the federal, state, authorizer, grant and local requirements and how do I ensure timely and successful compliance regarding such requirements?
- How do I plan to meet all stakeholder obligations and expectations effectively?
- What is needed on an annual, monthly, weekly, and daily timeframe to ensure a safe, orderly and clean facility?
- How do I learn about and continue to grow my knowledge regarding Michigan School Code and laws?
- How do I understand the facilities planning process and maximize facility use to improve instruction as my school population grows?
- Do I have a working knowledge of Board policies and practices?

School leaders will also need targeted development and support regarding effective leadership practices. After participating in an orientation, school leaders should be able to address the following questions:

- How will I create a culture of shared leadership and collegiality with the adults assuming responsibility for student performance?
- How will I uphold and embed the school's mission and vision?
- What will I need to plan for and execute in order to recruit, hire, manage, evaluate, and support staff consistent with the philosophy, mission, values and goals of the school?
- What do I need to learn to better understand and then implement a comprehensive accountability framework for all stakeholders?
- What professional learning do I need to deepen my knowledge of high-quality instruction and school culture?
- What will I need to do to demonstrate an ability to examine and make strategic and informed decisions based on data?
- How will I plan to implement and support school-wide data teams?
- How will I work to establish a persistent and clear focus on learning at the school, classroom, community and individual levels?

- What individual and school-wide reflective practices are necessary to create a culture of continuous improvement?
- How will I create a culture of shared leadership that encourages staff participation and dialogue?

Continued and effective staff development is key to ensuring teacher satisfaction as well as higher levels of productivity. Successful staff development should be relevant, timely and supported. To best support teachers, school leaders should create strategic opportunities for professional development followed by multiple opportunities for teachers to practice and discuss the implementation of learning from the professional development experiences. Therefore, the school leader orientation process should encourage new school leaders to address the following questions:

- What systems and beliefs do I need to create and embody to prioritize staff development and learning?
- What learning do I need to participate in to better understand how adolescents and adults learn?
- What systems and documents do I need to create to make individual professional learning and development plans for myself and staff?
- What is the school-wide professional development plan and professional development pathways designed to retain and develop staff for the first year of operation?
- How do I successfully build a culture of reflection designed to critically consider how schools can improve learning and achievement for all students?
- What assessments will I need to create/implement to evaluate the school's effectiveness and stakeholder satisfaction?
- How will I provide collaborative staff development opportunities and seek input for professional learning goals and topics?
- What is my commitment to and how do I convey my support of the coaching and continuous development of staff?
- How do I allocate the allotted resources to support professional learning?

Creating an effective school culture, focused on improving student achievement is essential to the success of any school, but it is especially critical in a new school. School leaders should understand that when examining a school's culture, there are things that can be seen – the procedures of the school – but that there are a number of things below the surface that serve to support the culture of the school including the relationships between and among people as well as the communication patterns established between and among school leadership and staff. The school leader must create and implement a system to operationalize the school's mission and vision, and in doing so, create a sustainable culture that all stakeholders buy into. The school founder should work to create an orientation plan that addresses the following:

- What will I need to learn and how will I establish and maintain a strong, college-going school culture and community where adults are responsible for student success?

- How will I ensure there is a focus on and providing support for whole-child development?
- What systems and practices will I need to create to sustain a culture of continuous improvement?
- How will I communicate the highest of expectations and create a “no excuses,” but supportive environment?
- How will I demonstrate that I possess a general belief that all students are intelligent, can learn, and will continue to improve over time?
- What will I need to do on a regular basis to ensure a safe learning environment for students and staff?
- What do I need to plan for and implement to respond to students’ identities and cultures?
- What needs to be done to develop a multi-year sequence of activities designed to successfully transition students to post-secondary goals?
- How will I promote opportunities for youth leadership and voice?

School leader orientation should also provide opportunities for new principals to learn about how to best engage community and civic leaders as well as wrap-around service providers. School founders should help school leaders identify resources, organizations and individuals who are willing to help support the school and its students. The school leader should be able to accomplish the following tasks prior to the start of the school year:

- Develop a parental engagement plan.
- Conduct an asset map exercise to understand the local strengths and resources available to the school community.
- Begin to identify and build partnerships with educational institutions to provide college coursework and other post-secondary opportunities.
- Work with business and community members to provide additional opportunities for student engagement including internships, career readiness opportunities and mentors.

Develop a system to assess all potential staff for fit and qualifications

According to federal and state requirements, instructional staff must be highly qualified in their subject area to teach at the secondary level and award credit. To verify that staff members are properly certified, the school founder and leader should request the following from potential candidates:

- Copies of transcripts from relevant academic institutions.
- Notarized teaching certificate indicating the subject area and certification received from the state.

The school leader should also be aware of the following resources:

- Michigan Educator Certification Status:
<https://mdoe.state.mi.us/MOECs/PublicCredentialSearch.aspx>
- Michigan Department of Education – Teacher Certification Information:
https://www.michigan.gov/mde/0,1607,7-140-6530_5683_14795---,00.html

The above listed websites offer a plethora of resources and information relevant to determining staff qualifications to fill the various positions in the school. Ensuring proper certification is essential to securing FTEs for each class period and course offered.

Classroom Management and Discipline Expectations

Creating an effective school culture is a challenging, yet essential, part of the school leader's role. In the secondary environment, students need clear and consistent expectations within a positive behavior support plan designed to promote an environment for learning. School founders and leader should review State of Michigan School Code Law, relevant School Board policies and other schools' Code of Conduct documents to help inform the creation of a code of conduct, discipline expectations, a positive behavior framework, and discipline expectations. The following list of resources and examples will help guide school leaders in ensuring classroom management and discipline expectations are clear and documented before the school year begins.

- *How to Create a Culture of Achievement in Your School and Classroom:*
<http://www.ascd.org/Publications/Books/Overview/How-to-Create-a-Culture-of-Achievement-in-Your-School-and-Classroom.aspx>
- *Closing the Attitude Gap: How to Fire Up Your Students to Strive for Success:*
<http://www.ascd.org/Publications/Books/Overview/Closing-the-Attitude-Gap.aspx>
- Positive Behavior Intervention System: <http://www.pbis.org/>
- Educators for Social Responsibility: <http://esrnational.org/>
- Discipline in the Secondary Classroom, with DVD: A Positive Approach to Behavior Management:
http://www.amazon.com/Discipline-Secondary-Classroom-DVD-Jossey-Bass/dp/1118450876/ref=sr_1_3?ie=UTF8&qid=1392076553&sr=8-3&keywords=Randall+Sprick
- Champs: A Proactive & Positive Approach to Classroom Management For Grades K-9:
http://www.amazon.com/Champs-Proactive-Positive-Classroom-Management/dp/157035166X/ref=sr_1_2?ie=UTF8&qid=1392076553&sr=8-2&keywords=Randall+Sprick

In addition to the resources listed here, the school leader should accomplish the following tasks and be able to answer the following questions:

- What training and communication will I need to provide my staff to ensure their buy-in around school-wide behavior expectations and classroom management?
- Do teachers have between 3-5 positively stated expectations posted in their classrooms?
- Did the staff develop common and clear expectations for school wide behavior expectations? Are the expectations posted?
- What learning experiences will students participate in to learn and practice expected behaviors?
- Are the consequences developed relevant?
- Has the school created clear systems to ensure due process is followed?

Creating an adult culture to support high expectations and a culture of continuous improvement

Effective principals are good communicators who embody the school's mission and vision and consistently model the expectations and behaviors they expect of their staff. The goal of this section is to encourage principals to plan systematically for and implement structures, opportunities and learning experiences for staff members to model high expectations for students, own their role in ensuring student success, and commit to continuous learning. New schools have a profound opportunity to shape the adult culture, to strategically design systems to support adult learning and to create an environment where adults feel empowered to support students in their own learning and development.

Research shows that shared leadership provides the best opportunities for fostering adult learning. The school principal should create professional development plan that encourages staff members to participate in the decision-making processes of the school. In addition, the school leader should review policies and practices to ensure they support professional learning opportunities for all staff members and that there is adequate time built into the school week and year for staff to meet together to review data and discuss student learning.

The following resources will help school leaders think through the structures and supports necessary to create an effective adult culture:

- *Creating a Culture of High Expectations, Student Motivation and Instructional Support in Schools and Classrooms*: <http://eric.ed.gov/?id=ED531107>
- *How to Motivate Reluctant Learners*: <http://www.ascd.org/Publications/Books/Overview/How-to-Motivate-Reluctant-Learners.aspx>
- Learning Forward: The Professional Learning Association: <http://learningforward.org/>

Chapter III: Instructional Accountability

In the **Instructional Accountability** section, school founders will learn about requirements of all public schools in Michigan, as well as those core components of assessment required by Michigan Future Schools. Each topic will include links to internet resources, as well as at-a-glance checklists for ensuring compliance beginning with enrolling and reporting students in the appropriate systems (i.e., CEPI, MSDS, BAA), and following through on all reporting compliance.

Topics addressed will include:

- Creating and maintaining Education Development Plans (EDP).
- Preparing for High-Stakes Assessments and Standards, including Michigan Future Expectations.
- Preparing for accountability unique to high school, including the Graduation and Dropout report.
- Ensuring Special Education compliance.
- Preparing for School Improvement.

Creating and Maintaining Education Development Plans (EDPs)

An Education Development Plan (EDP) is an action plan in which middle and high school students identify and document educational and career goals. The plan is designed to help students create a pathway to achieve their objectives. The purpose of an EDP is to help students to develop a continuous record of career planning that will in turn help guide them in reaching their career goals by taking all necessary steps, including post-secondary academic plans.

EDPs are required and intended for all secondary students in the State of Michigan. They are designed to help all students prepare for the next level of academic and career pursuits. By creating and updating this plan, students will benefit from planning that involves career goal setting, skill assessments, interest inventories, and help determining the preparation needed to meet their goals. Each grade level is in a different stage of implementing the EDP process. The following are the six basic EDP elements that are approved by the Michigan Department of Education:

1. Personal Information
2. Career Pathway Goals
3. Educational/Training Goals
4. Career Assessment Results
5. Plan of Action
6. Parent/Family Consultation and Endorsement (under age 18)

During the process, the student is the owner of the plan and helps drive the content and conversation. Students become active participants, completing activities and recording information pertinent to their interests and goals. Others, including advisors, counselors, teachers and parents may be supportive of this process by providing information, resources, experiences and reflection and planning opportunities.

Each year, students are required to complete the following:

- Update Personal Profile
- Complete the Career Match Maker Survey
- Read about and save 5 potential career options
- Identify 2 Career Pathways in the Career Prep section
- Name short (this year) and long term (next year and post-secondary) goals in the Career Prep section

Schools must provide students access to their EDPs and provide opportunities for students to update and complete the EDP on an annual basis. Oftentimes, schools require students to complete their annual update at the beginning of the year and then provide times for students to update the document as needed throughout the rest of the year. Schools should also contact a representative from Career Cruiser, a software program that enables students to complete their EDP, and secure annual licenses to ensure proper compliance.

Resources

- http://www.michigan.gov/documents/mde/MDE_EDP_10-2-09_296459_7.pdf
- <http://public.careercruising.com/us/en>
- <https://oakland.k12.mi.us/about-us/departments/career-focused-education/Pages/default.aspx>

Preparing for High-Stakes Assessments

The Michigan Department of Education launched a website for its Bureau of Assessment and Accountability (BAA). The BAA designs and manages statewide assessments. It is designed to help Michigan educators determine what students know and what students are able to do at key checkpoints during their academic career. This site is designed to provide school leaders, counselors, and secretaries with the ability to assign students, track data, and manage testing and accountability requirements for all Michigan high stakes assessments. The office is also responsible for school accountability, school and district scorecards, the annual Top to Bottom list, and the NAEP test.

- **BAA Site:** <http://www.michigan.gov/mde/0,4615,7-140-22709---,00.html>

All school leaders must request access to the BAA Secure Site to administer and manage assessments and accountability requirements. To accomplish this, the school leader will need a MEIS account. If the individual does not have a MEIS account please visit: <https://cepi.state.mi.us/MEIS/createnewaccount.aspx>.

- **BAA Secure Site:** <https://baa.state.mi.us/BAASecure/Login.aspx?ReturnUrl=%2fBAAsecure%2f>

The BAA site offers educators a multitude of resources for professional learning including the bi-annual conference presentations and resources. The school leader should spend time reviewing information presented in this section http://www.michigan.gov/mde/0,1607,7-140-22709_57003---,00.html and should try to attend at least one BAA conference per year.

High School students are currently required to take the annual Michigan Merit Exam (MME), which is given, in March, to every 11th grader in the state. The exam consists of three separate tests: the ACT, the WorkKeys exam, and Michigan developed assessments in math, science and social studies (aligned to Michigan High School Content Expectations). Each portion of the three-day exam tests and measures students' learning and skills in a variety of areas aligned to Michigan High School Content Expectations and ACT College and Career Readiness Standards. High school students should also take the Explore and PLAN tests during their ninth and tenth grade years. The Michigan Department of Education (MDE) will supply all testing materials for the Michigan Merit Exam according to student rosters and information uploaded to the State during the fall and winter count periods. Students, who are pre-identified to take the test (according to their student identification number), will be uploaded to the BAA site. The following list highlights relevant information to prepare to administer high stakes exams.

- The ACT requires a Test Supervisor, a Back-up Test Supervisor and a Test Accommodations Coordinator. These individuals will need to be named in the beginning of the year and participate in free, regional based training sessions.
- Complete all paperwork, sent by ACT, in a timely manner. This includes initial assignment of a school test code and the naming of contact persons.
- The BAA Secure Site governs the school's testing roster, the ordering of materials, incident reporting, tested and non-tested verification and other information needed to ensure a successful testing experience. This site will provide school leaders and counselors with information regardless of the required state exam. To that end, school leaders should familiarize themselves with the *Secure Site Procedure and User Manual* found here: <https://baa.state.mi.us/BAASecure/pdfs/SecureSiteUserManual.pdf>.
- One of the most important functions, related to test administration, that school leaders and counselors must understand is what is called: "The Accountable Students and Test Verification process (formerly known as Expected to Test, Tested Roster, and Students Not Tested)". This process opens for each required exam and relevant individuals receive notice from BAA regarding certain requirements.
 - **Accountable Students (formerly Expected to Test):** A list of enrolled students will be pulled from either the Fall or Winter Michigan Student Data System (MSDS) General Collection and Student Record Maintenance (SRM) files with an "as of date" to create the list of students that will be included in the school and district accountability calculations. This is based on enrollment information collected and reported for the respective Count Periods. The

student demographic information such as special education, economically disadvantaged, etc. will also be pulled from MSDS and used for accountability subgroups and assessment reporting. As a reminder, schools are now held accountable, according to the ESEA Flexibility Waiver (approved August 2012), to ensuring student proficiency for all subgroups.

- School personnel are responsible to review enrollment and student demographic information submitted in the MSDS general collection (MSDS and BAA “talk” to each other). A designated staff person can start submitting SRM files to add additional enrollments, student exit dates, and any changes in demographic information that happened between student count day and a specified date determined by the MDE (usually 3-4 weeks after count day). It is extremely important that this information is correct and up to date since schools are also held accountable to testing at least 90% of students who are deemed required to test. It is the school’s responsibility, not the State’s, to ensure the tested rosters are correct.
- **Test Verification (Formerly Tested Roster and Students Not Tested):** The test verification process will list answer documents received and scanned by the scoring contractor for all required assessments (MME) and give schools an opportunity to report missing answer documents, submit requests for students that used more than one barcode number, and other issues that may be resolved before reporting. During this time, school staff will also be able to submit the reason a student did not take one or more of the required parts of the assessment. All issues and reasons submitted will be reviewed by the BAA for a possible exemption and also for other required federal reporting.
- If a student did not complete a part of the assessment, school staff should gather information from teachers which students did not test and the reason they did not test. This will help make it quicker and easier to determine missing tests and the ability to submit a not tested reason.
- In addition to attending the bi-annual BAA conferences, school leaders should also attend MDE’s annual Michigan School Testing Conference. This conference will provide up-to-date information regarding the testing landscape, information for how to use assessment to improve student achievement, and other relevant topics on standards and assessment. This conference is increasingly worthwhile as schools implement new Common Core Standards and curricula and migrate to new testing requirements such as Smarter Balance Assessments.

Other important links and resources:

- Michigan Institute for Education Management (MIEM): <http://www.gomiem.org/>
- Michigan Merit Exam: http://www.michigan.gov/mde/0,4615,7-140-22709_35150---,00.html
- ACT: <http://www.act.org/>

High School Accountability

The role of accountability has dramatically increased over the last several years, drastically changing the role of the school leader. Today's principal must be able to navigate and answer to a number of stakeholders. Depending on the governance structure, number of funders and location, today's high schools have a number of accountability requirements – all of which are the overall responsibility of the principal. Specifically, for the Michigan Department of Education, High schools are held accountable to a number of metrics including:

- **Michigan Merit Curriculum and Graduation Requirements:**
http://www.michigan.gov/documents/mde/New MMC_one_page_11.15.06_183755_7.pdf
Frequently Asked Questions
http://www.michigan.gov/documents/mde/FAQ_-_Entire_Document_12.07_217841_7.pdf
- **Michigan Merit Exam Participation and Results:** http://www.michigan.gov/mde/0,1607,7-140-22709_35150---,00.html
- **Graduation Rates:** The "four-year adjusted cohort graduation rate" is calculated by tracking individual students from the time they were enrolled as first-time ninth-graders, with a four-year expected completion rate. The formula accounts for students who leave school and return later, for students retained in a grade and stay in school, and for students who transferred into and out of the public school system. Thus, this is a more accurate measure of the Graduation rate.
- Two-year achievement growth as measured by high stakes testing in the following areas: reading, writing, mathematics, science and social studies
- Annual student proficiency rates as measured by the MME
- Achievement Gaps between the highest and lowest scoring 30% of students
- Participation Rate - Number of Students Tested: 95% of All Students and all subgroups must be tested in Reading, Writing, Math, Science, Social Studies
- Teacher Evaluations
- Submission of School Improvement Requirements – School Process Rubrics and School Improvement Plan

According to the approved ESEA Flexibility Waiver (approved August 2012), all students must be 85% proficient in all four content areas by 2021-2022. This will adjust based on each year's high-stakes test scores. It is important for schools to note that this proficiency target applies to all subgroups. Schools are also only held accountable for "Full Academic Year" (FAY) students. This limits the impact of student transience on accountability and ensures that only students that have been educated by the school count towards proficiency targets.

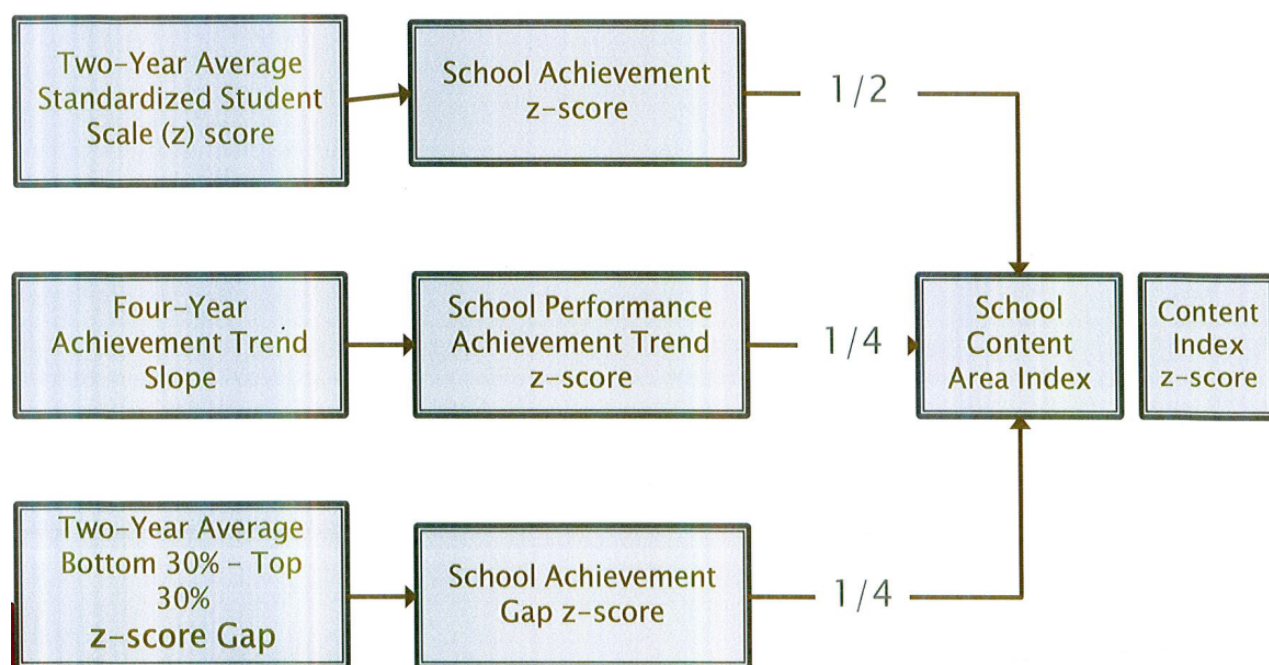
Top to Bottom List

The Michigan Department of Education has developed a system for ranking public schools to every other public school in the state. This ranking system is commonly known as the Top-to-Bottom List. Schools are given an overall percentile score which may result in a specific school designation of Reward, Focus, or Priority.

The ranking is based on student achievement, academic growth of all students and the gap between the highest and lowest scoring students in the school. The metrics used to determine the Top-to-Bottom Rankings are also used to determine Reward, Focus, and Priority schools. The simplest explanation of these three designations is that the top five (5%) percent of schools (as well as a school with a high rate of improvement) are labeled “Reward,” whereas the bottom five (5%) percent of schools are labeled “Priority.” Focus Schools consist of the ten percent of schools on the Top-to-Bottom List with the largest achievement gaps between its top 30 percent of students and its bottom 30 percent, based on average scale score. Identifying Focus Schools is designed to close the achievement gap within schools and reduce the achievement gap statewide. See the following website for additional information:

https://www.michigan.gov/mde/0,4615,7-140-22709_56562---,00.html.

The Top to Bottom Ranking is calculated based on the following:



Accountability Scorecards

With the adoption of the state's new waiver to the Elementary Secondary Education Act (No Child Left Behind 2001), schools are expected to have 85% of all students and subgroups proficient on state assessment by 2021-2022. A subgroup is defined as any group of 30 or more students who share economic, ethnic, limited English proficient, students with disabilities, or other characteristics. Schools have been assigned by the state an individual yearly Annual Measureable Objective (AMO). This replaces an annual statewide target of achievement for all schools. The AMO was calculated using the proficiency rate from the 2011-2012 school year to create annual targets that increment to an end proficiency rate of 85% by the 2021-2022 school year. The Michigan Department of Education has now developed a five-color system for districts and schools called Accountability Scorecards. In order of highest color to lowest, they are: Green, Lime, Yellow, Orange, and Red. Colors are based on meeting targets in the different Scorecard components.

The system is partially a point-based system which uses school-specific AMOs (Annual Measureable Objectives) for all students and subgroups. Each school or district earns an overall proficiency percentage which corresponds to one of the colors in the five-color system. In addition, the colors can change based upon student participation/proficiency on state assessments, educator evaluation, compliance factors, and student attendance/graduation rates. The final overall Accountability Scorecard color will remain unchanged or it could be lowered to a yellow, orange or red. Proficiency and participation have the most impact on the overall color for the school as well as for each of the subgroups.

Yellow scorecards are extremely common across the state, due to the number of additional factors that prevent a school from receiving a Green or Lime designation. As a common example, if a single subgroup is not on track to reach 85 percent proficiency or did not test over 95 percent of the population, then that one single subset of students will prevent a school or district from receiving a color higher than Yellow. While this system is somewhat complicated, it appears to be a better representation than assigning letter grades to schools and districts as was done in the previous Report Card reports. Please see the MDE's website for more information: http://www.michigan.gov/mde/0,1607,7-140-22709_25058---,00.html.

Special Education Compliance

Today, schools must provide students with disabilities appropriate access to the general curriculum and effective instructional support. Student progress must be monitored closely and demonstrated through participation in assessment efforts. The principal's role is pivotal in the special education process and when starting a school, the leader must have the staff and processes in place to provide special education services when school begins.

A “free appropriate public education” refers to special education, and if required, related services designed to meet the individual needs of students with disabilities. These services must be provided to any student with special education needs by the school he/she is enrolled in. This is defined by the federal rules that govern special education. Students with disabilities who enroll will need a copy of their “Individualized Education Program” (IEP). This is a written, individualized program for a student with a disability that is developed with an IEP team that includes parents, teachers, and other necessary specialists.

Effective school leaders are committed to the success of all students and build a culture of collaboration to achieve this goal. To meet the needs of students with disabilities, school leaders need to create an environment where all teachers are able to provide instructional strategies tailored to meet the needs of all students, including those with disabilities. Skillful principals invest the time necessary to devise policies and procedures that facilitate classroom support that enables staff members to successfully do their jobs. To ensure special education compliance, school leaders should:

- Develop application materials and enrollment processes that enable parents/guardians to communicate if their student had previously received special education services.
- Meet with staff responsible for enrolling new students, reminding them to implement procedures to identify students who receive special education services.
- Ask parents/guardians to provide the most recent copies of the IEP or other relevant documentation.
- Read the IEPs and 504 Plans. After reading each student's plan, make notes regarding what general education teachers need to implement, and what strategies and interventions are required for each student.
- Provide time for Special Education teachers and general education teachers to meet regularly, analyze student data and discuss students' needs and progress.
- Review special education and/or related services in IEPs and determine if adequate resources are available to implement the IEPs of students enrolled.
- Keep accurate and detailed records of all meetings, especially the student's annual IEP meeting.
- Check for parent understanding regarding all decisions made during the IEP meeting as well as in conferences and conversations related to the student's performance and needs.
- Respond to parent inquiries and concerns in a timely manner.
- Identify problem areas regarding special education and discuss them at staff meetings.

- Put in place procedures to:
 - Provide access to the current IEP to all staff responsible for implementing each student's program;
 - Make sure that all staff responsible for implementing each student's program have a clear understanding of all points of the IEP they are responsible for implementing.
- Plan for pre-referral interventions for students:
 - Class and school wide intervention programs
 - Student Success/Achievement/Intervention Team process
- Meet with staff to confirm or assign responsibility for the following special education tasks:
 - Student Discipline
 - Behavior Intervention
 - Creating and supervising the IEP Calendar and Data Collection
 - Creation of the Master Schedule and student programming necessary for special education students
 - Supervision of the Special Education Assistants/Aides/Paraprofessionals
 - Administrator/Administrative Designee at IEP meetings
- Put in place a procedure for special education teachers to complete and distribute progress reports to parents at all reporting periods.
- Plan for time to review the documents listed under “resources” with the staff.

Resources

- Michigan Department of Education Office of Special Education: http://www.michigan.gov/mde/0,1607,7-140-6530_6598---,00.html
- Michigan Special Education Laws and Policies: https://www.michigan.gov/mde/0,4615,7-140-6530_6598_7376---,00.html
- Michigan Administrative Rules for Special Education: https://www.michigan.gov/documents/mde/MARSE_Supplemented_with_IDEA_Regs_379598_7.pdf
- Special Education Department at Oakland Schools: <https://oakland.k12.mi.us/about-us/departments/special-education/pages/default.aspx>

School Improvement

The School Improvement process was designed to promote continuous school and district improvement. The framework and supporting documentation and reporting requirements are based on education research and best practices. The Michigan Department of Education School Improvement process brings together state and federal requirements, so all schools across the State of Michigan have a common language and vision for discussing and implementing school improvement plans. School Improvement is not a one-time event, but a continuous process. The School and District Improvement Plans are the vehicles that organize and drive the continuous improvement process. This process cycle provides the foundation for schools and districts, regardless of organization, i.e. a charter school is considered a single-building district to address school and district needs and promote student achievement. This is accomplished through a comprehensive and systematic approach that includes four distinct phases: “gather, study, plan and do.” Each phase includes collaborative conversations with stakeholders and the completion of various reports and supporting documentation. School Improvement reporting is completed via an online reporting and management system (AdvancEd) and has undergone numerous changes over the last couple of years. Schools and districts now use the latest technology to help streamline the documentation and reporting process through the AdvancEd Adaptive System of School Improvement Support Tools (ASSIST). This new system allows schools to simplify, and yet enhance, their efforts to grow student achievement.

During the “gather” stage and “study” phase, schools collect data and build their Executive Summary. The Executive Summary is a narrative document that includes the following components: 1) description of the school; 2) explanation of the school’s purpose (mission and vision); 3) notable achievements and areas of improvement; and 4) any additional and supporting information. Schools should collect and assemble state-level and local achievement data, surveys, and other relevant information to “study” the data, and set goals and objectives. The School Improvement process requires that schools and districts collect the following categories of data: achievement, demographic, perception, and process. The perception and process data must include information from multiple stakeholders including: staff, students, parents and community members.

To collect this data, schools should create and disseminate surveys. The AdvancEd tool provides samples of surveys aligned to all reporting requirements. Each group of stakeholders should be asked questions related to the following categories: 1) purpose and vision; 2) teaching and learning; 3) school/district climate; and 4) resource management.

During the Plan phase, the school analyzes data and instructional practices to consider ways to improve student achievement. This process is deeply embedded in building and state planning and accountability systems, and, over the last couple of years, has become an even more integral part of school reform and accountability requirements.

While Public Act 25 (PA 25) does not require districts to develop a district improvement plan, those districts who receive any of the federal grant resources contained in the Elementary and Secondary Education Act (ESEA) legislation are required to develop and submit a District Improvement Plan. Such grant resources include: Title I, Title IIA, Title III, Section 31A and Special Education Funding. This plan is based on the analysis of multiple data sources across the four content areas, including: demographic, achievement, perception, and process data. The District Improvement Plan (including single-building district plan) is used as a blueprint to establish goals, objectives, strategies, and activities that will guide teaching and learning, resource



allocation, professional development, data-driven decision making and assessment. All state and federal resources must be represented in the plan and reflective of all activities included in each of the school building plans.

Additional school improvement requirements include:

- 1) Executive Summary where schools describe areas of pride and concern as well as the school's mission, vision, beliefs, and population served;
- 2) Improvement Plan Stakeholder Involvement Report that describes how school and district stakeholders were involved in the School Improvement Process and creation/review of the reports;
- 3) School Data Analysis, a report that analyzes demographic, enrollment, achievement and perception data;
- 4) School Improvement Plan that includes all goals and plans for addressing areas of concern and improvement noted in the School Data Analysis; and 5) a Professional Development Plan that describes how instructional staff will learn about and implement the strategies and activities described in the School Improvement Plan.

Resources

- Michigan Department of Education School Improvement: http://www.michigan.gov/mde/0,1607,7-140-28753_38959---,00.html
- AdvancEd: <http://www.advanc-ed.org/>

Chapter IV: Facility Readiness

In the Facility Readiness section, school founders will learn about components of selecting a facility and preparing it in a timely way for a smooth opening of the school year.

Topics addressed include:

- How to search for and acquire a quality facility, including lease/purchase agreements
- Facility Conditions and Considerations: What to look for and require for “curb appeal” of the property, selecting Property Management, ensuring renovations and ongoing interior/exterior maintenance
- Overseeing construction projects and ensuring the facility meets the educational specifications for the school.
- Ensuring the facility receives all occupancy permits prior to opening day
- Selecting, ordering, and receiving furniture for classrooms and offices
- Selecting, ordering, installing and maintaining technology and phones: infrastructure and equipment
- Planning and developing safety policies and procedures
- Ensuring safety and environmental services and compliance with state and federal requirements
- Planning for parent parking and drop off/pick up routes
- Preparing a student-ready facility with evidence of the college-going culture

How to Search for and Acquire a Quality Facility, Including Lease/Purchase Agreements

Identify potential sites and conduct site visits, understanding the process can be time consuming and frustrating in the Detroit climate. Over the last few years, most schools have looked at several sites before locating an acceptable site. An ideal location may prove to have a dearth of acceptable or available buildings, or may not be located near transportation or potential students.

Once a potential site is identified, assess the facility for code and renovation needs, then negotiate lease/purchase agreements. Upon successful completion of the lease/purchase agreement, select a construction project manager to coordinate any needed renovations, obtain construction permits, then upon completion secure occupancy permits. During the renovation phase, identify and order all furniture needed for classrooms, staff and public spaces.

Many aspects of opening a new school depend on timely acquisition of a quality school facility. Advice and recommendations on securing a facility all begin with starting early, having a broad search process, and working with commercial real estate experts.

Real estate attorneys or commercial realtors will be familiar with available facilities, property owners, and leasing processes. Select a team known for working with school founders and consider them your best resource for facility acquisition.

In Detroit, there are several common sources of available facilities, each with its own challenges. Detroit Public Schools, the Archdiocese of Detroit, and other closed private schools have closed facilities that are on the market, but securing final lease/purchase agreements can be a challenge.

Property occupied by a charter school and used exclusively for educational purposes is exempt from some real and personal property taxes. The Michigan Public Educational Facilities Authority is dedicated to providing opportunities for low-cost financing and technical assistance for qualified public educational facilities and public school academies through its bonding and loan programs. Call 517-335-0994 to learn more about financing a facility.

Facility Conditions and Considerations

When visiting potential school sites, it will be important to observe carefully all aspects of the facility. You should consider the “curb appeal” of the property to your school families. Ideally, your site will be close to neighborhoods with many school-aged children. Regardless of the location, search for a facility that is easily accessible from a main road and public transportation, so any student interested in attending has easy routes to school.

When touring a facility, study and take note of the site carefully to assess your interest in it and whether it has the capacity to serve the number of students you plan for in the first four years. You will want to take careful note of the condition of the facility, not only for its appeal to potential school families and its usability for your school design, but also for the improvements and financial investment you will need to make to prepare it to welcome your students. Make sure to ask about property management at the site, and how you will work with them to ensure ensuring renovations and ongoing interior/exterior maintenance are handled in a timely manner.

Your checklist should include the following items to assess for condition, safety, security, and potential cost for improvements:

Facility Exterior

Age of Facility

When was it built?

When were additions built?

Updates and improvements?

What is the status of asbestos? If there is asbestos, has it been contained.

Curb Appeal

- What is your first impression?
- How will staff, parents and students respond to the building?
- What is the condition of the neighborhood? Are the homes occupied or not?

Driveway and Access from the Main Road

- Will it need to be resurfaced?
- Is it gated?



Parking Lot

- How many spaces exist?
- What is the surface? Will it need to be resurfaced or painted?

Landscaping

- Is the grass well maintained?
- Shrubbery? Can it be pruned, or will it need to be removed?
- Trees? Age, condition, needs
- Flag pole age, condition, needs

Windows

- When were they installed?
- How many windows are broken?

Exterior Surface

- Is brick tuck-pointing in good shape?
- Is there graffiti that will need to be removed?

Signage

- What does current signage look like?
- Will you be able to use the existing sign structure?

Exterior Doors

- Condition of doors, locks, hinges?
- Is there a security system?
- Is there a buzzer system?

Roof

- What type of roof?
- When was current roof installed?
- Are there signs of leakage or ice damming?

Facility Interior

- Is there water damage in ceiling tiles or warped flooring?

Entrance and Hallways

- How wide are the corridors?
- What is the condition of the lockers?
- Is there a place for a welcome/security desk?
- Where is the main office?
- What are the sight lines like?



Flooring

- What is the flooring material?
- Condition and age? Will it need to be replaced?
- Are there damaged areas that will need to be repaired?
- Is there asbestos in older linoleum?

Office

- Is there a welcome counter?
- How many private offices are available for administration/counselors?
- Is there enough space for your planned staff?

Classrooms

- Sizes
- Number
- Is there a science lab room with proper ventilation and eye wash sinks? Is there a room with running water that can be converted?
- Are there elementary classrooms with counters and door handles for young children that will need to be converted for older students?
- What kind of lighting exists?
- Are ceilings in good condition? Are there signs of leaks?

Restrooms

- How many restrooms exist?
- What is the condition of the stalls?
- What is the condition of the toilets?
- What is the condition of the sinks?
- Plumbing and drains?
- What esthetic work will be needed?

Structure

- Are stairs in good condition?
- Is there an elevator?
- How old is the roof? Are there any signs of water damage?
- Doors close properly

Technology

- Will existing wiring support current and future technology needs?
- Head end room?
- Telephone wiring?
- Age of existing technology?

Mechanicals, HV or HVAC

- How old is the boiler?
- Is the building sprinkled?

- Is the building cooled?
- Are individual classrooms or offices cooled?
- What is the condition of the electrical system?

Overseeing Construction Projects and Ensuring the Facility meets Educational Specifications

Unless your facility is move-in ready, count on a tight construction schedule. You will need to assign a project manager to oversee and ensure that all aspects of improvements are up to code. Develop a checklist of projects with timelines that have some buffer built in to account for unplanned delays. Do not leave your final inspection for the Friday before Labor Day.

Ensuring the facility receives all occupancy permits prior to opening day

Michigan law requires all schools to have a valid Certificate of Occupancy. Failure to obtain necessary inspections and obtain this certificate can result in a potential withholding of State Aid. Information about the requirements and procedures for obtaining a Certificate of Occupancy is maintained at the Bureau of Licensing and Regulatory Affairs (LARA). Call 517-241-9302 to notify the Bureau of your plan to occupy the facility and work with them to develop a schedule for inspections and approvals.

Schools are also required to make all health and safety reports regarding school facilities available to the public, including annual asbestos reporting. See below for the section describing asbestos reporting.

Selecting, ordering, and receiving furniture for classrooms and offices

Plan ahead for delivery and installation of furniture prior to the summer orientation program. The process of determining furniture and equipment needs is best completed by considering the type of teaching and learning environment to be used in the Academy classrooms. This determination should be collaborative and involve staff members who will use the classrooms and offices. Other considerations include the budget available for such equipment, as well as bidding requirements of the State of Michigan. In Michigan, furniture and equipment over the state bidding limit must be publicly bid. This limit changes annually and is available on the state website: https://www.michigan.gov/mde/0,4615,7-140-6530_6605-21356--,00.html

For furniture below the bidding limit, it is best to secure at least three quotes based on your specifications. In most cases, the management company will support this process and ensure all legal requirements are met. Selecting, ordering, installing and maintaining technology and phones: infrastructure and equipment.

Selecting, ordering, installing and maintaining technology and phones: infrastructure and equipment

Select a technology services provider and work with them on all aspects of your technology plan. It will be essential to timely installation that you adhere to the implementation timeline your tech provider establishes



for you. Delays are most frequently attributed to coordination between the school operator and the tech team, and can be avoided with diligent adherence to the plan.

School founders can apply for e-Rate discounts for telephone, internet or intranet systems. The Universal Service Discount Program for Schools and Libraries is operated by the Federal Communications Commission (FCC). Under the program, schools can receive discounts of 20% to 90% depending on the free/reduced lunch rate of their student population. For official E-rate guidance, visit www.sl.universalservice.org, or, for Michigan-specific advice, call the SLD Client Service Bureau at 1-888-203-8100 or email: question@universalservice.org. School e-rate consultants work with schools and technical service providers to help operators maximize their discounts.

Planning and developing safety policies and procedures.

Work with your Board's policy development agency to develop policies and procedures related to school safety. A good resource for school operators is the School Safety Legislation Summary of employee criminal history requirements

(http://www.michigan.gov/documents/School_Safety_Legislation_Summary_Oct_05_140542_7.doc).

Ensuring safety and environmental services and compliance with state and federal requirement

Asbestos

The Environmental Protection Agency (EPA) requires annual asbestos inspections and notifications. If asbestos containing material (ACM) exists, the school should contract with an environmental firm to conduct asbestos and air quality inspections and develop an Asbestos Management Plan. Make sure when hiring contractors that all asbestos abatement work is performed by Michigan Licensed Asbestos Abatement Contractors.

Make sure the plan is available for public review in the school office and posted on the school website. The Asbestos Hazard Emergency Response Act (AHERA) regulation also requires surveillance of the condition of ACM every six months and re-inspections every three years.

Planning for parent parking and drop off/pick up routes.

A smooth arrival and dismissal experience will shape parents' and students' first impressions of your school. Prior to the opening of school, plan your school drop off and pick up plans with your staff. Ensure that the first days students and their parents come to your site, the traffic plan is clearly defined with signage and handouts. As much as possible, work with your school security staff, local police, and area businesses to avoid bottlenecks and prevent students from crossing in between vehicles.

If your students and their parents have difficulty with the plan, be willing to revisit the plan and make revisions quickly. Communicate with school families about modifications to help reduce stress at the beginning and end of the school day.

Preparing a student-ready facility with evidence of the college-going culture.

Aim for August to have at least the public areas of your facility student-ready with college-going decor, including signage, posters, college banners and pennants. The college-prep high school culture will develop when everyone in the school community maintains a conversation about the college-going mission. School rituals for later years, can include celebrations for students upon college acceptance (issuing a special tie), scheduling special college nights with visits from college admissions staff, campus visits and tours to give students exposure to college life and expectations, financial planning workshops for parents should begin in ninth grade.

Chapter V: Budget & Finance

In the Budget & Finance section, school founders will learn about components of budget development and management essential to all public schools in Michigan.

Charter schools are required to follow a common fiscal year that runs from July 1 to June 30. Charter schools are also required to follow generally accepted accounting principles for governmental entities. The *Michigan School Accounting Manual* addresses these principles and is an essential reference tool for school financial officers. For further guidance, contact: Office of State Aid and School Finance, 517-335-0524.

The school will need to follow a uniform chart of accounts as outlined in the Michigan School Accounting Manual. An annual comprehensive financial report must be uploaded by November 15 into the *Financial Information Database* (FID) maintained by the Center for Educational Performance and Information (CEPI). This is critical, because the penalty for noncompliance is the withholding of state school aid payments.

The school will be required to undergo an annual independent audit of financial accounting records by a certified public accountant. All charter school financial audits are subject to Government Auditing Standards (GAS). The book describing the standards is available online by visiting www.gao.gov.

Charter school Boards must adopt a budget prior to the beginning of each fiscal year, using the minimum levels of appropriation described in Section IV of the Michigan School Accounting Manual. Charter schools are not allowed to adopt or operate under a “deficit budget” (State School Aid Act, MCL 388.1702. MDE closely monitors entities that violate this statute). Finally, Charter schools are required to post the same transparency information on their website that all public schools provide [MCL 388.1618(2) and RSC 503(6)(1)].

Source: MDE Michigan Charter Schools – Questions and Answers, January 2012 - http://www.michigan.gov/documents/PSAQA_54517_7.pdf

Topics addressed will include:

- Developing business management procedures.
- Developing purchasing protocols and management practices for school funds, including policies or protocols for purchase orders/check requests/credit cards, etc.
- Developing a balanced budget for the launch year and subsequent school years
- Prepare transparency reporting on website

Developing business management procedures

The establishment of sound business management procedures is essential to ensure long-term financial stability of the Academy and annual audits of the Academy’s financial records that document sound financial management. Business management procedures range from the process for developing the Academy budget to how the finances of the Academy are reported to the Academy Board of Directors and the Academy Authorizer. More specifically, below is an overview of successful business management concepts and procedures that are important to consider for new school operators:

- Federal funds such as those for Title I, Title II, IDEA, and food service must be accounted for separately from Unrestricted Funds which are received from the state in the form of State Aid. The application and accounting for these funds must be carefully managed.
- Budget development for all funds, whether they are in the form of federal grants or in the form of what school operators identify as the “General Fund” (which are more discretionary in nature) should begin with an assessment of need related to staffing and goods and services. Beginning with zero and building the budget based on need avoids a major budgeting pitfall in which annual budgets are based solely on prior year budgets. The use of prior year budgets as the basis for future budgets is not effective or efficient, and often leads to excess spending.
- Auditors will always want to ensure proper internal controls are in place. From a basic business office operations perspective, it is essential there be a separation of duties and responsibilities known as “internal controls” designed to avoid the potential for mismanagement of funds. For example, the Human Resources department should determine what wages will be paid to employees and inform the payroll office of those amounts. It would be unacceptable for the payroll department to decide what people should be paid since doing both creates the potential for misappropriation of funds. Likewise, the staff member who prepares purchase orders for goods and services should not be the same individual who writes the accounts payable checks. Again, combining the two functions creates the potential for misappropriation of funds.
- The state requires a common chart of accounts for public schools. It is necessary and appropriate to budget funds appropriately within the account structure, so that as funds are expended and reporting occurs, the reports are comparable with other school districts and academies. It is essential the administration, management company, and Board of Directors are all familiar with the chart of accounts so they can understand the financial reports produced for review as part of the Academy’s fiduciary responsibility.
- A process of amending the Academy budget should be institutionalized and used as needed throughout the course of the fiscal year. The annual budget is developed and approved prior to the start of the fiscal year and is based on assumptions related to enrollment, state aid, and other factors that impact revenue. Once the school year enrollment is known and staffing is complete, it is necessary to reconcile revenue and expense projections and amend the original budget. This usually occurs in November or December. Similarly, it is important to be mindful of the state law requiring that year-end revenue and expense budgets be within one percent (1%) of actual revenue and expenses. As a result, a final budget amendment will be necessary prior to the end of the fiscal year.

The best way to ensure that appropriate budget management procedures are in place is to establish a protocol handbook for use by all staff with budget management responsibilities. This handbook should include all policies and procedures approved by the Academy Board related to finances, as well as tutorials on the use of the chart of accounts, the financial reports that are used regularly to inform the Academy Board and Authorizer of the Academy’s financial status, and job duties of all employees who have budget responsibility.

Developing purchasing protocols and management practices for school funds, including policies or protocols for purchase orders/check requests/credit cards, etc.

The Academy Board is entrusted with the fiduciary responsibility of the Academy, making it necessary for the Board to establish specific policies associated with this responsibility. These policies will create the parameters needed for those responsible for the budget. It is from these policies that administrative guidelines are developed for budget management and reporting. The National Charter School Institute is a resource for policy development and policy training. Below is a sample list of policies that should be approved by all Academy Boards:

- Federal Funds
- Discretionary Grants
- Investments
- Borrowing
- Bad Checks
- Student Fees, Fines, and Supplies
- Fiscal Planning
- Budget Preparation
- Budget Hearing
- Budget Implementation
- Purchasing
- Awarding Contracts for School Construction Projects
- Vendor Relations
- Payment of Claims
- Payroll Authorization
- Payroll Deductions
- Student Activity Funds
- Petty Cash Funds
- Fair Labor Standards Act
- System of Accounting
- Audit
- Public Disclosure and Reporting

Whether or not a Public School Academy is self-managed or managed by an Education Service Provider, the Academy Board cannot delegate its fiduciary responsibilities. The only way to ensure proper financial management is through sound finance policy development, and careful budget and financial oversight.

Developing a balanced budget for the launch year and subsequent school years.

One of the most important planning activities of a new Academy Board is development of its launch year budget and a financial plan for subsequent budget years. Assumptions related to enrollment, the foundation allowance, and projected federal revenues will need to be made as part of the revenue budget process, while



the expenditure budget should be designed to ensure that Academy operations can be carried out in a thorough and efficient manner. However, when developing the expenditure budget, it is essential that there is an appropriate relationship between instructional costs and support costs.

Instructional costs are those that are directly related to classroom instruction such as the cost of teachers, instructional supplies, and instructional equipment. Support costs are those that support instruction, including the cost of administration, management and Authorizer fees, counselors, social workers, facility costs, and utilities. Ideally, instructional costs should exceed support costs as a percentage of the budget. Budgets in which support costs are too high, including the cost of facilities, generally have a negative impact on the ability of the Academy to ensure high-quality instruction and student achievement.

Practically, the development of the budget should be based on need and prepared in a collaborative way with staff and administration. The goals and policies of the Academy Board should drive the budget which, once developed and recommended, requires critical analysis by every member of the Board prior to approval. Once adopted, the budget deserves the support of the entire Board and must be reviewed monthly by the Board based on the financial reports prepared for the Board.

Prepare transparency reporting on website

Charter schools must provide the same transparency information on their website that all public schools provide [MCL 388.1618(2) and RSC 503(6)(1)]. Instructions for the information to be posted is updated annually via a notification from the MDE at

http://www.michigan.gov/documents/mde/Budget_Transparency_Reporting_327912_7.pdf

Instructions on the transparency reporting are usually disseminated to finance directors, but they involve human resources and your webmaster. Make sure everyone is in the loop and understands the importance of keeping these reports up to date. Your webmaster will need to design the homepage with a link to the Transparency Data and to [MiSchoolData](#), as instructed by this document.

Chapter VI: Pupil Services

In the Pupil Services section, school founders will learn about components of planning and preparing for Michigan Department of Education (MDE) mandated pupil accounting to ensure a smooth audit and maximize per pupil funding.

Most critical to successful pupil accounting is diligent record keeping. When hiring a secretary/clerk for your school, make sure to select someone with documented experience with fastidious dedication to meeting deadlines, impeccable record keeping, knowing every student and their family situation, and organizing and maintaining neat and timely filing systems. This may sound like the ideal person for any job, but top performance of these skills is critical to pupil accounting success. Someone who is not committed to meeting deadlines, allows files to pile up, is inconsistent in record keeping, or cannot locate information immediately upon request could cost you pupil funding.

The individuals you charge with pupil accounting must also receive training from your student information system provider and your ISD auditors to ensure they are familiar and comfortable with all aspects of the enrollment, records, and pupil accounting processes.

In addition to detailed explanations of the following topics, the end of this section contains essential links to resources for pupil accounting. Topics addressed include:

- Acquiring an independent school code
- Securing any needed Seat-Time Waivers from the MDE
- Ensuring the school calendar complies with pupil accounting requirements
- Selecting a Student Information System
- Preparing for Count Day
- Establishing procedures for student scheduling and dissemination of schedules
- Establishing standardized student records retention and dissemination procedures

Acquiring an independent school code

After your Authorizer's Board has voted to approve your school, you may apply for an independent school code from the MDE. Michigan's Center for Educational Performance and Information (CEPI) will create the code for you upon request. You can start by contacting CEPI customer support at cepi@michigan.gov or contact the help desk at 517-335-0505.

Securing any needed Seat-Time Waivers from the MDE.

If your school year calendar will require any modification of a traditional school day or fewer days than the standard required by MDE: 170 days and 1098 hours, you'll need to request a Seat-Time Waiver (STW) from the MDE. This is a provision allowed under Section 5-O-B of the Pupil Accounting Manual (http://mi.gov/documents/mde/5-O-B_SeatTimeWaivers_329678_7.pdf). Additional detail is posted on the TechPlan.org website. Read this carefully each time you plan to apply for a Seat Time Waiver. The process of

applying for a STW is fairly simple, requiring only a two-page STW Application (http://www.techplan.org/downloads/word_documents/stw-app_20130220_143430_2.doc), but the pupil accounting requirements are significantly more rigorous than a traditional student. Students are required to document ten logins during the count period, as well as weekly two-way, educationally relevant mentor contacts during the count period. If any of these requirements come up short of the target, the student cannot be counted for membership.

Follow-up reporting will be directed by the MDE. It involves extensive documentation of student enrollment, attendance, and credits earned (student performance).

Ensuring the school calendar complies with pupil accounting requirements.

The Pupil Accounting Manual (http://mi.gov/documents/mde/Section-2_250846_7.pdf) is the bible for pupil accounting requirements is posted online and updates are maintained there. Always consult it prior to developing your school year calendar or other reporting, to ensure you are up-to-date on requirements. As of 2012-2013, schools in Michigan are required to provide a minimum of 1098 hours of instruction (no longer including professional development hours), and a minimum of 170 days of instruction. Again, it cannot be stressed enough: check the pupil accounting manual regularly for modifications that may impact your school calendar.

Check with your ISD for their Common Calendar of start date (after Labor Day by State Law), and holiday breaks. PSAs are required to align with the county calendar. The ISD will require that the school year calendar is submitted in the summer prior to the start of school, as well as submitting with each Count Day submission (these fall and spring submissions provide an opportunity to amend the calendar based on up to five forgiven days for bad weather, or other necessary modifications). Furthermore, the ISD will often provide a template calendar from which to develop your school year, which assists in ensuring the required days and hours of instruction are provided.

It is also important to note that the State of Michigan provides full funding on a per diem basis if school enrollment is above 75% on each day. If, on a given day, your school attendance dips below 75%, you will not receive full funding for that day. When preparing your annual calendar, align carefully with the larger public school district communities where your students reside. For example, if DPS is closed the day before Thanksgiving, your students may be more likely to also be absent in larger numbers. It is worth consideration to avoid scheduling school on a day unlikely to have full attendance.

Selecting a Student Information System

Your selection of a Student Information System will impact every phase of pupil accounting including, recording student attendance, pupil accounting, and student achievement. You will need to establish a contract with the vendor, set firm timelines to ensure readiness on Day 1, and agree to a plan for technical support.

School operators will need to assess for themselves which system they prefer. There are pros and cons, strengths and weaknesses in all systems. If you prefer to be aligned with your county auditor, one of the

most commonly used Student Information Systems (SIS) used in Michigan is [MiStar](#) (formerly Zangle) which is maintained by the Wayne RESA and used by most Wayne County districts. It is also used by most Oakland Schools districts. If you prefer to be aligned with other charter schools and Pearson products, another commonly used student information system is [PowerSchool](#).

Regardless of the system you select, adherence to a rigid implementation timeline is critical to on-time delivery of the product. These are large organizations and they are not solely dedicated to launching your school's student system. If you miss a deadline or are not on top of the project, the system may not be ready for the first day of school. In one worst case scenario, a new school did not have their student information system in place for either the Fall or Spring Count Days. This created serious issues with the ISD auditors and could have resulted in lost FTEs (full time equivalent student funding). Don't let this happen to you. Be diligent and make communicating with the installation team a top priority.

Preparing for Count Day

Your first step is to establish a relationship with the ISD pupil auditors to ensure your school's compliance with reporting mandates and a complete and accurate Count Day. Based on their guidance, you will then develop on-site pupil accounting procedures to be ready for Count Day.

You will be required to provide your ISD auditor with copies of your written procedures for ensuring a complete and accurate pupil count, including a description of your student information system (electronic and manual reporting) for maintaining enrollment and attendance records; the experience and training of staff working in pupil accounting; an overview of your staff's participation in partnerships with other schools; a description of your plans for record retention, procedures and practices; a copy of the procedures administrative personnel will use to document (in writing) their review of the completed program alpha lists, including a representation that all program documentation is on file in accordance with state laws; a description of the training program for new, inexperienced pupil accounting staff on membership accounting rules and procedures.

Source: http://www.michigan.gov/documents/mde/2011-2012_and_2012-2013_Student_Count_Day_Information_362677_7.pdf

Your school funding will depend on meeting enrollment targets and is calculated based on your pupil membership, i.e., the number of full-time equivalent students (FTEs) enrolled in your school on Count Day. There are two annual Count Days in Michigan, the fourth Wednesday Count Day is usually the first week of October; and the spring Supplemental Count Day occurs in February. For first- and second-year charter schools, per pupil funding is allocated based on a 50/50 blend of the two current year counts. For existing schools, per pupil funding is allocated on a 90/10 blend, i.e., it is based on a membership blend of 90% for the October pupil count, plus 10% for the *following* February pupil count in the concurrent school year (as of FY 2013-2014).

Source: http://www.michigan.gov/documents/mde/October_437726_7.pdf

Note on New Students

Because of the significant bonus of the start-up 50/50 blend to new PSAs, recruiting additional students for second semester's February Count Day will be critical to maximize your enrollment. Develop a protocol for everyone in the school to follow to ensure a smooth assimilation of new students into the school culture and



community. This includes any student who enrolls after your summer bridge or orientation programs. Make sure every staff member is notified of the new student, teachers are given notice to prepare for their new students, and notification is made in your student information system to indicate the student's first day of attendance. Not only will the student benefit from the personalized support, but the impact of "the new kid" on the school community and culture can be minimized. Orientation should always include introducing the student to all of their teachers, selecting a buddy to build personal connections, and a complete facility tour. New students also need an overview of your student handbook and behavior expectations.

Establishing procedures for student scheduling and dissemination of schedules for first day of classes.

One of the measures of a well-managed school is the operation of your first day. Make a plan to distribute schedules for all students in a carefully orchestrated way. Make sure that new students who enroll on the first day, and those who have missed your bridge and orientation programs, are welcomed and made to feel comfortable without waiting in a lonely office for instructions on where to go. That first day will be more memorable than you may realize.

Establishing standardized student record retention and dissemination procedures

Prior to accepting students, establish a consistent records filing and order procedure. The State of Michigan publishes a directive called the *Records Retention and Disposal Schedule for Michigan Public Schools* (http://www.michigan.gov/documents/hal_mhc_rms_local_gs2_171482_7.pdf) which details the length of time schools are mandated to keep student records. For example,

It is suggested that school office staff scan student records to reduce paper storage. Upon graduation or exit from your school, student records should be scanned and forwarded in the following order with these contents: Transcript, Test Record Documents, CA-60 Form (enrollment form), Birth Certificate, Report Cards, Immunization Record/Shot Record, and any Miscellaneous Information (custodial documents, parental info).

Chapter VII: Communications

In the Communications section, school founders will learn about components of an effective communications plan, including crisis response planning.

Topics addressed will include:

- Establishing the school public relations identity
- Establishing and implementing a comprehensive student recruitment and marketing plan
- Developing a Media Relations Plan.
- Developing an Emergency Crisis Response Plan and Communications Plan
- Organizing parent groups and encouraging parent involvement.

To attract students to the new school, a comprehensive public relations and marketing plan must be executed efficiently and with fidelity to the school's implementation plan and marketing plan. Every stakeholder must be clear on the key messages. Centrally, the team must identify the school leader(s) who will be prepared to handle controversial or challenging public relations matters, while others focus on recruiting students. Communications must be on the ground, in person, and backed up by informative web presence, signage, posters, brochures, and social media. Marketing tools include all options in the arsenal: radio, print, direct mail, and web. The timeline for recruiting continues through Count Day, but is essentially continual. Awareness of the school must be sustained to continue to attract students in subsequent years. Enrollment processes must be ready as soon as outreach begins to capture interested families as they apply.

Establishing the school public relations identity

Carefully choose your school's visual and virtual identity by selecting a logo and colors that represent your school and its mission. You will be living with these decisions for a long time, so they are critical. Establish and follow timelines for publishing school brochures, flyers and newsletters, creating a school website, and establishing and maintaining a social media presence, as outlined in the following chart.

Establishing and implementing a comprehensive student recruitment and marketing plan.

The challenge and goal of a successful recruiting plan is to inform students and their parents about the mission and goals and details of the school, to draw a clear picture of what the new school will look and feel like, and how their student will "fit" and succeed once enrolled.

For everyone, especially parents, their choice to enroll in the new school will involve a leap of faith. They are, after all, planning their future based on a school concept that they have yet to see in action. It is important to carefully define the target audience. Future students in the new schools will include boys and girls who live in the neighborhoods nearby, and in a broad way – across metro Detroit. These schools will be open enrollment, so with a target focused on local residents who will not have transportation issues to contend with, the majority of students will most likely be local. However, some students may choose to travel a distance via bus or parent transportation.



School Leaders and Principals must be on the ground to recruit. They should focus on neighborhood-level recruiting strategies, including hosting bi-weekly open houses beginning in May; visiting area youth clubs to get to know the students; visit area churches and ask to make presentations at services or other gatherings. Coinciding with these activities is the implementation of a marketing campaign to establish the school's identity, including a comprehensive approach to social media, and radio and print advertising.



Initial Notification to the Public of Launch

May

School Identity Design	<p>School Names – Clarify relationships with</p> <p>Taglines & Key Messages</p> <p>Boilerplate Information</p> <p>Unifying Colors & Mascots</p>
Contact Information	<p>Set up phone message for inquiries – possibly multiple phones, one for each school.</p> <p>Identify email addresses for school leaders.</p>
Website	<p>Establish the school website as soon as possible, including contact information, enrollment information, and reference material that can be additional to brief Facebook/Twitter posts or print materials.</p>
Social Media	<p>Set Up Facebook, Twitter Accounts – Begin sharing information.</p>
Prepare Print Materials	<p>Press Kits with key messages, addresses, contact information, dates of enrollment events.</p>
Press Coverage	<p>Host a press meeting to outline your school’s plan to open and clarify key messages. Give reporters and editorial page writers opportunities to ask questions and clarify the special qualities of your school identity. Make sure other messaging is in place for reference.</p>
Print Advertising	<p>The Michigan Chronicle has two special education issues – May and August</p> <p>Metro Parent and its affiliates – monthly issues reach many parents.</p>

**Radio Campaign**

Radio advertising aligned with upcoming events. Based on key messages, with a call to action, i.e., “Come meet the principal on May ____.”

Summer Recruiting Activities**June-July****Open Houses, Events**

Outreach to the neighborhood needs to be face-to-face and frequent.

Neighborhood Visits**Signage, Posters, BillBoards and others**

Establish identity in the neighborhood and building. Posters articulate key messages.

School Brochures

An attractive piece to compete with other high school options, include details of what to expect from both the student and parent/guardian perspective. Distribute via mail and at neighborhood locations.

Robo Calls

Keep in touch with interested families and those who have applied using a robo-call system via phone and email.

Enrollment Process

Clarify enrollment process; have staffing ready to accept applications.

Initial Notification to the Public of Launch**Aug-****September****Continue Open Houses**

As soon as the building is ready for visitors, offer tours and office hours with the principal. Enrollment continues through Count Day.

Events**Neighborhood Visits**

Developing a Media Relations Plan.

The school leadership should support the school recruiting efforts by positioning positive news stories about the program and its goals throughout print and online media.

New schools operating in Detroit are opening in an environment that is sometimes politically and emotionally charged by affiliations with Detroit Public Schools or biases against charter schools. The school leadership will need to be mindful of the potential for negative responses as the local community adjusts to their presence. This means providing key messages and talking points to all stakeholders about the mission and goals of the school, positive outcomes in the design of the new schools, and the responsibility for success and where it lies. Those on the front lines in recruiting and enrolling students will need the full support of the school leaders, so they can focus on telling their story, communicating their vision and plans to serve the children in that school. If confrontations occur, the principals and their teams will need talking points and go-to people, who in turn, must be available to provide back up and support for the tough questions.

It is recommended that Principals and others on the front lines publicly and strategically acknowledge parent/student/community concerns about the school, and describe their commitment to creating a successful, supportive school community that welcomes parent/student/community involvement and support.

Developing an Emergency Crisis Response and Communications Plan

You may not be able to prevent an emergency, accident or tragedy, but you can control how you respond. Being prepared for emergencies includes rehearsing your emergency communications response plan with your staff and ensuring your key stakeholders know what to expect from you during and after an emergency. There are several phases of an emergency that you'll need to prepare yourself and your staff to face. The initial response is event from the moment it occurs through ensuring your students and staff are safe, appropriate emergency responders are notified, parents, Board, and media are notified. In some ways, the initial response to an emergency is the easiest phase. You expect to have high adrenalin, focus on the tasks that need to be handled, and make sure everyone is taken care of. You'll have several hours of intense activity followed by a debriefing meeting with all involved personnel. The second phase of an emergency comes in the subsequent days. You should expect to feel emotionally and physically drained by the emergency, but follow-up media responses will continue to come in for several days as local print media and even national media pick up your story. It takes patience to continue to respond to questions about an incident, especially if you are focusing on healing or repairing your local school community.

Best Practices for Emergency Crisis Response

Adjust these suggested emergency response techniques to your local building and student population.

Critical Steps Prior to Opening a School:

1. Identify a safe location away from the building in case your students and staff must shelter elsewhere.
2. Have an arrangement with your transportation service to provide emergency shelter to students evacuated in cold or inclement weather.
3. Make sure your school is equipped with safety response equipment, including AED defibrillators, fire extinguishers, flashlights, protective gloves, and walkie talkies, for example.

4. You will need to develop and post evacuation plans throughout your building.
5. Publish, share and review your emergency response handbook with everyone in your building.

Contents of the emergency response handbook should detail your building plan for:

- a. Fire in the Building
- b. External Fire Near the School
- c. CPR & AED Defibrillator Guidelines
- d. Choking Guidelines
- e. First Aid Guidelines
- f. Weather Emergencies – Tornado Watch vs Warning during school, and plans for after school & evening activities
- g. Bad Weather During the School Day: Snow Storms & Thunderstorms
- h. Evacuation – Building Not Safe Inside
- i. Bomb Threats
- j. Intruder Situation, including preventive actions regarding visitors and locked exterior doors.
- k. Weapon in School or Hostage Situation
- l. Lock Down Procedures – Threat Inside the Building
- m. Secure the Building Procedures –Threat is Outside the Building
- n. All Clear Procedure
- o. Run-Hide-Fight Procedures

Homeland Security responses to intruders have changed significantly in recent years. It is highly recommended that all adults and older teens in your building view the video “[Run, Hide, Fight](#)” posted online. Source: 2013 Guide for Developing High-Quality School Emergency Operations Plans, joint publication of US Departments of Education, Health and Human Services, Homeland Security, and Justice, the FBI and FEMA.

- p. Interacting with First Responders

Make sure your staff is trained to cooperate with and not interfere with law enforcement officers. If asked to display empty hands with open palms, or place hands on heads, comply with their directions.

School Closing Information

Plan in the summer prior to the opening of school to make sure the school’s emergency closing information is recorded with the [Southeast Michigan School Closing Network](#).

Keep these contact links and phone numbers handy at all times, in case you need to notify the families that school will be closed.

<http://www.se-miclosings.com/closeme>

Emergency Phone: 855-245-3991

Hotline: 248-255-7100

Your school will receive a combination of a unique ID number, and Password number from the School Closing Network. Keep this information in a secure location and only share it with individuals who have the authority to announce the close of school.

Emergency closures may result from inclement weather, equipment failures, power outages, or other unforeseen circumstances. Use your website, Facebook and Twitter to notify your school families, as well as your school's robo-call system. Notify school families as early as possible, so they can plan alternatives for the day, or avoid treacherous travel.

Best Practices for Emergency Communications

Being prepared means you have the following in place:

1. Checklist of emergency response plan including:
 - a. An emergency guide for all staff that you have reviewed, discussed, and rehearsed.
 - b. Phone numbers and email addresses for your key contacts. Keep them handy in your phone and on paper. It is recommended to keep contact information on your desk, in your car and your nightstand at home.

Emergency - If there is a true emergency, dial 911 (check your phone system to make sure you do not have to first dial 9 for an outside line, i.e, 9-911).

Detroit Police (Non-Emergency)	1-248-541-3650
Poison Control Center (24 Hours)	1-866-222-1222

Hotlines

National Child Abuse Hotline	1-800-422-4453
National Domestic Violence Hotline	1-800-799-7233
National Runaway Switch Board	1-800-786-2929
National Substance Abuse Hotline	1-800-784-6776
Rape Abuse National Network	1-800-656-4673
Runaway Rapeline Assistance Program (24 Hours)	1-800-292-4517

Counseling

Common Ground Sanctuary Crisis Hotline	1-800-231-1127
Common Ground Sanctuary Youth Shelter	1-248-547-2260
Child Protective Services (24 Hours)	1-866-975-5010
Detroit Wayne Mental Health Authority	1-800-241-4949
City of Detroit Health Department	1-313-876-4000

Oakland County Community Mental Health Services	1-800-858-1210
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Oakland County Health Division	1-248-858-1280
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Utilities

Consumers Energy	1-800-889-1252
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Detroit Edison	1-800-477-4747
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Detroit Water	1-313-267-7401
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- c. Instructions anyone can follow for setting up an automated message.
- d. Instructions for composing a press release.
- e. Media releases for staff and students on file, recorded in your student information system.
- f. You have reviewed, discussed, and rehearsed the following suggested approaches to handling the media if they ask to come into the school or on school grounds to cover an emergency event.

What to do when the media come calling . . .

1. Keep in mind that your ability to negotiate the interviews will impact the outcome of the coverage.
2. Remember you have rights. You have the right to say “No,” or “Not now.” But the media has wants. Work with them to keep them apprised of your plans to release information, or hold a press conference.
3. Do not feel obligated to allow reporters and/or photographers on school property without the prior consent of the school leadership. Make sure your staff and students know this, as well, so they don’t invite them in a side door.
4. Remember that the media are guests on school property.
5. Remember there is no such thing as “off the record.”

If the media visit your site, follow these steps:

1. Listen first, before you say anything. Take notes.
2. Find out when their deadline is.
3. You don’t have to invite them into the school.
 - a. The media must have permission before they can film or interview students. Make sure for any student who will go on film you have first secured parent/guardian permission in writing.
 - b. You don’t have to give the media permission to film on the property; however, they can go across the street and use long lenses.

Before giving a taped interview:

1. Ask the reporter to tell you all of their questions.
 - a. Find out the topic and the specific information they want.
 - b. Find out if the interview will be aired live.
2. Ask who else the reporter will be interviewing. This is important if you sense a negative report.
3. If you are not comfortable, decline the interview.
4. Ask for time to prepare and respond. Even five minutes can be enough to gather your thoughts.

- Prepare answers to the standard questions: who, what, where, when, why, how, and how much.
- Practice bridging or transitioning back to the topic.
- Prepare to answer tough or sensitive questions. Show compassion. Salute the professionalism of your staff and refer to Board policies and ensuring the best outcome for everyone involved.

Example: Q: “Mr. Smith, we’ve heard that one of your teachers has been suspended after allegations she did something inappropriate to a student.”

A: “We are following our school Board policies and investigating this matter. We take the safety and security of our students and staff very seriously.”

Example: Q: “Mr. Smith, an accident occurred at your school today. What do you have to say about it?”

A: “We are all saddened by the accident that occurred. I thank and commend our outstanding staff for their quick and skilled response to the incident. I also thank the police and first responders who came to our aid.”

- Identify your key messages before you talk with reporters. Rehearse how you want to start and end your statement. Repeat your message at every opportunity.
 - Prepare to refer to school Board policy. Be consistent.
 - Be brief. Use short, terse statements. Do NOT give them a paragraph answer.
5. Select a neutral location without noisy distractions, busy backgrounds, or an opportunity for people to walk behind you. Turn off your cell phone.
 6. Set a time limit and plan an exit strategy. (See “When the Interview is Over” below)

How to say it with style:

1. Keep a professional looking jacket in your office at all times, just in case you need to be on camera. Comb your hair before going on camera.
2. Make sure your facial expressions, tone of voice, and word choices reflect the topic. If the news is bad, show your concern. If the news is good, be excited.
3. Avoid mirroring the reporter’s facial expressions and tone when on camera.
4. Keep your answers brief (sound bites). Don’t offer more information than the reporter has asked you to provide.
5. For print media, if the reporter is taking notes, speak slowly to help them quote you accurately. If you are concerned about them quoting you accurately, ask them to repeat what you’ve said.

Dealing with Difficult Issues

1. Always tell the truth. Never lie. (These are the indelible words of Tim Skubick, a seasoned reporter who has been covering Michigan government and schools for years.) And if you forget: Never lie. Always tell the truth. Not even a “little white lie.” Admit when you don’t know. Admit when you’ve made a mistake.
2. Maintain eye contact with the reporter; ignore the camera.
3. Maintain the school’s perspective; avoid personal opinions.

4. Never name employees or students during a discussion with a reporter.
5. When it's bad news they're after, give the narrowest possible answer. Tell the truth, but don't elaborate.
6. Focus on positive steps you are taking.
7. Don't speculate on what might happen if someone else's bad news happened here, i.e., after a school tragedy, area reporters may be looking for a local angle and will want to know how you're prepared to avert or respond to a similar situation.
8. If you don't know, say so. Never lie. Always tell the truth.
9. When the interviewer stops talking, you should stop talking. Remain silent or ask, "Have I answered your question?"
10. The more you repeat your message, the better your chances that your message will be included in the story
11. Reporters who keep asking the same questions may be setting you up.
12. If you are asked an inappropriate question, here are ways you can respond:
 - Tell them you don't have sufficient information to comment.
 - You can say, "It would be premature for me to speculate on the outcome now."
 - Your best weapon against being misquoted, trapped on camera, or pushed to say something against your will is silence. Stop talking and look calmly at the reporter while awaiting the next question. Dead air never plays.

When the interview is over

1. Take off your microphone and hand it to the reporter.
2. Watch the news to make sure the story is reported accurately and fairly. Contact the media to make sure necessary corrections are noted.
3. Watch yourself on camera to see if you came across as you wished.
4. Make a plan for follow-up information, i.e., another press briefing, or responding in the coming days.

Lessons Learned - Don't Do it this way:

<https://www.youtube.com/watch?v=mwThttbKsKo> ("Press conference on Southgate student's suicide" posted by David Herndon)

Watch this clip of a press conference held within a few hours of an in-school suicide in Southgate, Michigan on March 22, 2013. This violates every rule of handling the media. Too many details are shared about the student and his character. There is too much speculation. The police chief goes on way too long – someone should have gone to the mike and thanked everyone for their time. Then, everyone should have left with a promise to hold a follow-up press conference at a later time. The setup of the room traps the speakers and they can't leave.

Sources

Combating Media Terrorism, Laurie DeVarney, Public Relations Director – Oakland, California

Maximize Your Performance with the Media, David R. Voss Associates production for the National School Public Relations Association (NSPRA)

Tips for Working with Television News, Shank Public Relations Counselors, www.shankpr.com/tvtips.htm.

Media Comparison Overview, Finderbinder, http://finderbinder.com/pr_media_relations_.html.

You Can Win When They Confront You, MSPRA Tip Sheets,
<http://admin.melg.org/mspra/tips/confrontation.htm>.

Organizing parent groups and encouraging parent involvement.

Your parents will be your best advocates in the community. After your school is established, you'll benefit from the power of word-of-mouth when satisfied parents tell their friends about their child's positive experiences in your school. Supporting and encouraging parent involvement can pose a significant challenge, especially for parents who did not have positive school experiences themselves. If they see school as a source of authority, demands, and punishment, encouraging them to come to parent-teacher conferences may prove a significant challenge. There are some methods that have been successful in encouraging parents to participate in school events.

Schedule events at varying times of the day, even on weekends, to allow working parents more flexibility to attend.

Frequent reminders are important. Send parents a series of invitations and reminders. Don't assume one notification will get to them or that they will remember it. Use every communications tool you have, i.e., Facebook/Twitter, email, phone calls, U.S. Mail, text messages and flyers sent home. Phones work well for text message reminders and calls, but be cautious not to cry wolf. Parents will start to ignore your important messages if you inundate them with too many reminders. They will need to be able to distinguish between an important message and a reminder.

When inviting parents to learn about your online communications systems, such as parent access to your student information system, arrange for their children to be their instructors and go-to guides. This has been a successful method at several college-preparatory schools. Be patient with parents who may have limited computer experience and are nervous about breaking the computer, or lose their passwords. Select passwords that are easy to remember and provide them on wallet sized cards, so they can keep track.

Glossary & Resources

BAA: The Bureau of Assessment and Accountability (BAA) uses student data reported through the MSDS as its source for each school's student roster of students expected to test on the MEAP or MME. Assessment & Accountability Data Timeline -

http://www.michigan.gov/documents/cepi/2013_fall_BAA_timeline_433145_7.pdf

CEPI: Michigan's Center for Educational Performance and Information (CEPI) maintains academic, personnel and financial information about each school in the state. School personnel can request a list of their authorized users at any time by sending an e-mail message to CEPI customer support at <mailto:cepi@michigan.gov> or contact the help desk at 517-335-0505.

Charter Schools in Michigan (http://www.michigan.gov/documents/PSAQA_54517_7.pdf): The MDE publishes a handbook for operators of public school academies (PSAs). It is a handy reference for new school operators.

Collection and Submission Dates (http://www.michigan.gov/documents/cepi/2013-14_Collection_Timeline_430936_7.pdf): CEPI publishes a collection timeline chart that is essential for meeting the reporting deadlines for MSDS, GAD, REP, SID, and FID.

EEM (<http://www.michigan.gov/eem>): Educational Entity Master contains information about Michigan's educational entities, including official identification codes and contact information for Michigan's educational systems.

GAD: Graduation and Dropout review and appeals process, July-September annually, prior to publication. The GAD application provides users the ability to review their graduation and dropout rate reports prior to rate publication annually in January. CEPI provides appealable graduation and dropout rates via the GAD in August to provide a Graduation Rate Appeals Window. Auditable graduation and dropout rates are provided in mid-October during the exit status audit window. Final graduation rates are available for preview in the MI School Data Portal in January, before the rates are released to the public. GAD Login for MEIS account holders is: <https://cepi.state.mi.us/graddrop/>

Direct Certification (http://www.michigan.gov/mde/0,4615,7-140-43092_50144-194535--,00.html): Each school must directly certify students who are members of

households receiving assistance under the Food Stamp Program as eligible for free school meals, without further application, based on information provided in an electronic data file from the Department of Human Services (DHS). Using Direct Certification, student data input to MSDS is refreshed monthly by CEPI and matched with other agency reports, i.e., the Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), and Foster Children data from the Michigan Department of Human Services (DHS). For more information, the *Eligibility Guidance for School Meals Manual* (<http://www.fns.usda.gov/sites/default/files/EliMan.pdf>) provides detailed instructions.

McKinney-Vento Homeless Assistance Act (<http://www.ed.gov/programs/homeless/guidance.pdf>): McKinney-Vento is the primary federal legislation serving the education of children and youth experiencing homelessness in U.S. public schools. It was reauthorized as Title X, Part C, of the No Child Left Behind Act in

January 2002. Each ISD receives funding to support homeless students, and schools are responsible for reporting students who qualify to their ISDs upon enrollment, upon discovering they qualify, and annually.

MCL (<http://www.legislature.mi.gov/>): Michigan Compiled Laws (MCL) include any bill passed by the Michigan House and Senate and approved by the Governor that becomes either a public act which has general applicability or a local act which affects a particular area of the state.

MEIS Account (<https://cepi.state.mi.us/MEIS/Login.aspx>): MEIS is your login to all data management at the MDE. CEPI manages the Michigan Education Information System (MEIS), the data collection and reporting system used by schools to submit data to the state and by CEPI to combine, store, and report that data. Contact the MEIS Help Desk at (517) 335-0505.

MPAAA (<http://mpaaa.org/index.php>) – Membership in the Michigan Pupil Accounting and Attendance Association is highly recommended to remain updated on requirements for pupil accounting and to continually update and refine processes, and share best practices.

MDE (<http://www.michigan.gov/mde/>): Michigan Department of Education.

Michigan Charter Schools - Questions and Answers (updated Jan 2012) -
http://www.michigan.gov/documents/PSAQA_54517_7.pdf

MICR (<http://www.mcir.org/>): Charter schools are required to report immunizations to this state registry. If the charter school is new, then it must report on all students. If the charter school has been open for more than a year, it must report only on the newly enrolled pupils. For more information on this topic, please contact the Office of Grants Coordination & School Support at 517-373-1122, or the [MICR website](#). The MICR website has dozens of links and documents that can be downloaded for school use.

MSDS (http://www.michigan.gov/cepi/0,4546,7-113-986_50502-225003--,00.html) is one of several data collection systems managed by CEPI. CEPI is an office located within the Michigan Department of Technology, Management and Budget (DTMB), Office of the State Budget. Michigan's charter schools (PreK-12) are required by state and federal laws to collect and report data about students, personnel and individual schools under the coordination of CEPI. Each year, updated information about collections and data requirements is posted to the MSDS page on the CEPI website at www.michigan.gov/cepi. Click on "CEPI Applications" in the left navigation bar, and then click on "Michigan Student Data System."

Source: http://www.michigan.gov/documents/cepi/Collection_Details_SY1213_MDE_amended_v1_395820_7.pdf

MSDS Best Practices (http://www.michigan.gov/documents/mde/MSDS_Best_Practices_400576_7.pdf): Familiarize yourself with this Steps to Success guide that outlines all the steps to quality accountability reporting.

OEI (http://www.michigan.gov/mde/0,4615,7-140-6530_30334---,00.html): The Office of Education Improvement and Innovation promotes student learning and achievement by providing statewide leadership, guidance and support over a wide range of programs, including public school academies.

PEPE (http://www.michigan.gov/cepi/0,4546,7-113-986_50502_53650---,00.html): The Primary Education Providing Entity for a student is used in assigning accountability for graduation cohort and Adequate Yearly

Progress (AYP). For students reported by multiple districts, only the PEPE can update Personal Core characteristics.

PSA (http://www.michigan.gov/mde/0,1607,7-140-6530_30334_40088---,00.html): A Public School Academy is a charter school district (excludes LEA districts) established under part 6a of the Revised School Code and can also include an urban high school Academy established under part 6c, or a strict discipline Academy established under sections 1311b to 1311l. [MCL 380.5(7)].

Pupil Accounting Manual (https://www.michigan.gov/mde/0,1607,7-140-6530_6605-21321--,00.html): The Michigan School Accounting Manual (Bulletin 1022) serves as a mandatory guide to the uniform classification and recording of accounting transactions for Michigan public school districts. This manual provides guidance for Michigan public school districts on pupil membership requirements and count procedures provided by the Office of State Aid and School Finance.

Revised School Code

([http://www.legislature.mi.gov/\(S\(tqbx2mxalirwgqc2x1htdttw\)\)/mileg.aspx?page=getObject&objectname=mcl-act-451-of-1976](http://www.legislature.mi.gov/(S(tqbx2mxalirwgqc2x1htdttw))/mileg.aspx?page=getObject&objectname=mcl-act-451-of-1976)): This is the state's system for revising, consolidating, and defining laws relating to elementary and secondary education.

Section 25 FTE Transfer Requests (http://www.michigan.gov/cepi/0,4546,7-113-986_50502_53650---,00.html): Section 25e of the State School Aid Act (MCL 388.1625e, Public Act 60 of 2013) was created for fiscal year 2014 to allow for any school to claim prorated full-time equivalency (FTE) for pupils who transfer/enroll after the Fall Pupil Membership Count Day and before the Spring Count Day (105 days). Further revisions were made under Public Act 130 of 2013. The process for reporting new students and exited students is proscribed under Section 25e and at this writing in December 2013, has just been implemented. Consult carefully with your ISD auditors on procedures and timelines, as they are likely to change. The Section 25 Financial Calendar (found at the link above) provides a handy calculator for the estimated FTE that will be funded by the number of days a student has been enrolled between count days.

SOS: State of Michigan Single Sign On (<https://sso.state.mi.us/MSDS/Default.aspx>): This is where you'll login to access your student record information. You'll need to sign up to gain access to this system. It's very organized and provides reports, such as your DS4061 and Section 25 Summary Reports.

SRM: Student Record Maintenance Collection (http://www.michigan.gov/cepi/0,4546,7-113-986_50502_53650---,00.html) - In addition to the data submitted through the General Collections, districts may use the SRM to update or correct demographic information. To be included in accountability calculations, each SRM record must have an "As of Date" within a specific date range and must be certified before the published deadline.

UIC: A Unique Identification Code (http://www.michigan.gov/cepi/0,1607,7-113-986_50502_52376---,00.html) is assigned to each student as a permanent, unique and secure number that stays with that student throughout their K-12 education and assists in ensuring students with similar names or shared birthdates are distinguished as individual from grade to grade and school to school.

UIC Resolution (http://www.oakland.k12.mi.us/gov_comm/pupil_accounting/UICResolution_MPAAA_Fall_0607.ppt): The process of ensuring that each student is correctly associated with a particular UIC. Resolutions are required when students appear on more than one school's Count Day roster. The link provided here

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walks through step-by-step instructions for checking on duplicate UICs or resolving disputes between multiple schools reporting a student. Make sure your pupil accounting person knows their responsibility as your UIC Resolver to complete UIC Resolution for collections in the MSDS.