

Sussex Montessori School Planning year 5/1/2018 – 9/30/2019

School scheduled to open fall of 2019

Developed with Data from DDOE Marketing and Start Up Plan for school starting 2015-16 on DDOE Charter Office Website.

Category	Task	Benchmark to Complete	Responsible
Education Program	Submit updated application with any modifications or conditions identified as pre-conditions to final approval.	By November 2018 if required	School Leader /Board Chair
	Develop/approve/Submit Charter Performance Agreement to DDOE	December 2018	Board/ School Leader
	Order Montessori Classroom Materials	April 2019	School Leader
	Identify/Order Instructional Technology	April 2019	School Leader
	Order Assessment materials as outlined in curriculum documents	April 2019	School Leader
	Develop an inventory and tracking plan for instructional supplies and technology	April 2019	School Leader
	Submit School Calendar and hourly attendance survey to Financial Reform and Management group	April 2019	School Leader
	Develop a guide for teachers regarding assessments and curriculum as outlined in the charter application	May 2019	School Leader
	Montessori materials and other curriculum materials organized and distributed	July 2019	School Leader
	Review Files and IEP's for incoming students	July / August 2019	School Leader/ Education Director
	Develop and Prepare Consolidated Grant application	July 2019	School Leader/ Education Director if hired
Facility	Engage in negotiations on school site #1 while charter approval process is happening	January – June 2018	Board of Directors with Project Manager consultant

	Cost estimates for major items for repurposing site completed	March 2018	Board of Directors with Project Manager consultant
	Develop details and conditions of a 30 year lease with options on site number 1	Spring 2018	Board of Directors with Project Manager consultant
	Sign lease for preferred site	June 2018	Board of Directors with Project Manager consultant
	Begin repurposing construction work	June 2018 – June 2019	Board of Directors with Project Manager consultant
	Occupy site	June 2019	Board of Directors with Project Manager consultant
	Engage in negotiations on Site #2 if site #1 is not an option	January – June 2018	Board of Directors with Project Manager consultant
	Parcels of land identified as back-up sites will be explored for regulatory requirements, construction costs, etc.	January – March 2018	Board of Directors with Project Manager consultant
	Negotiations for property	May 2018	Board of Directors with Project Manager consultant
	Settlement on property	July 2018	Board of Directors with Project Manager consultant
	Completion of modular and occupancy	July 2019	Board of Directors with Project Manager consultant
	Engage in negotiations for option 3 if site 1 and 2 are not options	Begin May 2019	Board of Directors with Project Manager consultant
	Secure financing for sites with NCALL support (letter of interest in application) and other sources of financing.	Winter/Spring 2018 for financing in place upon approval for charter.	Board of Directors with Project Manager consultant
	Insurance as appropriate will be required of all sub-contractors.	Upon beginning of work	Board of Directors with Project Manager consultant

	Submit copy of signed lease or purchase agreement, description of facilities, and any budget revisions to DDOE. Submit plan for construction/renovation for facility to DDOE.	By December 2018	Board of Directors
	Consult with DTI on technology connections and phone connections.	By February 2019	Board of Directors/ School Leader / Project Manager Consultant
	Order furniture for school	March - April 2019	School Leader/ Board of Directors
	Submit CO to DDOE	June 2019	Board of Directors
	Purchase DTI border router	July 2019	School Leader
	Prepare classrooms to open school	June – August 15	School Leader, Education Director, Teachers, Board, Volunteers
Finance – all necessary documents and confirmations sent to DDOE per Charter School Compliance Requirements. Highlighted here are requirements through September of the first year of operations.	File for 501c3 status	January 2018	Board of Directors
	Acquire Liability insurances per DDOE requirements for Planning Year (estimate in attachments)	July 2018	Board of Directors
	Monitor Planning Budget Monthly as outlined in application	May 2018-July 2019	Board Finance Committee
	Establish fiscal policies, protocols and procedures	July 2018	Board Finance Committee
	Submit FSF/PHRST Access Plan to DDOE	July 2018	Board of Directors
	Access State Accounting and Payroll Systems	July 2018	Board Finance Chair
	Ensure monthly posting of school's financial reports	July 2018	Board Finance Chair
	Provide DDOE with any budget revisions	December 2018	Board Finance Committee
	Report Identified students and enrollment in DENARS on the CEP site	April 2019	Business Manager/School Leader
	Consult with state Division of Accounting to develop internal controls for SMS	April 2019	School Leader
Apply for FFVP grant funds	May 2019	School Leader	

	Negotiate/Secure/Confirm all major contracts (Food Service, Bus Transportation, Telcom, etc.)	Spring 2019 completed by May 2019	Business Manager/School Leader
	Hire Audit Firm	June 2019	Board Finance Committee
	Report on Operations Balances	July 2019	Business Manager/ School Leader
	Complete Consolidated Grant and submit to DDOE	July 2019	School Leader / Education Director if hired by then, Board support
	Annual audit conducted	July 2019	Board Finance Committee and Business Manager
	Establish Citizen's Budget Oversight Committee	July 2019	Board/ School Leader
	Financial Report of School Nutrition Program	July 2019	Business Manager/ School Leader
	Submit copies of signed contracts for transportation, food services, related services for students with special needs, or any other services to DDOE	August 2019	Business Manager/School Leader
	Submit for Federal reimbursement for eligible meals served to students.	September 2019	Business Manager/School Leader
	September 30 Enrollment Count submitted	September 2019	School Leader
	Audit results submitted to DDOE	September 2019	Board Finance Committee and Business Manager
Marketing/Student Recruiting	Continue garnering interest and recruiting potential students	Spring 2018	Board and Sussex County Volunteers from interest forms
	Develop Recruitment Materials (Logo, Brochures, Website) in preparation of charter approval	February – May 2018	Board and Sussex County Volunteers from interest forms
	Develop recruitment plan for implementation up approval	February – May 2018	Board and Sussex County Volunteers from interest forms

	Attend events such as Charter Network Expo, State Fair exhibit hosted by Montessori Works, Hispanic Festival, etc.	Summer 2018-and on going	Board and Sussex County Volunteers from interest forms
	Partner with organizations such as L’Esperanza, Summer Collaborative, the early childhood community to communicate with potential families	Summer 2018-and on going	Board and Sussex County Volunteers from interest forms
	Secure Data Service Center contract for student application management	July 2018	Board
	Parent Information Meetings & Community Outreach for student recruiting	July 2018 – July 2019	Board and Sussex County Volunteers
	Monitor applications/enrollment numbers; adjust marketing strategies to reflect need	September 2018- July 2019	Board and School Leader
	Develop Social Media Campaign	September 2018	School Leader/ Board Support
	Prepare enrollment packets	October 2018	School Leader
	Submit sample parent enrollment letter to DDOE	November 2018	Board of Directors
	Deadline for applications for the lottery	January 2019	School Leader
	April 1, reporting of enrollment demonstrate enrollment of 80% of authorized number of students. Provide certification to DDOE and districts of residence.	April 2019	School Leader
	May 1, reporting of enrollment/ Ensure maximum enrollment prior to May 1st count	May 2019	School Leader
Operations	Prepare student handbook	Fall 2018	School Leader
	Establish Account on DDOE IMS system	November 2018	School Leader
	Submit documentation that staff has been trained on data reporting	February 2018	Board of Directors
	Ensure that all students meet school entry requirements for Health records and uploaded to eSchool student health records.	September 2019	School Nurse

	Immunizations, TB, Emergency Cards, Health Examinations		
	Consult with DDOE Associate for Reporting to review attendance policy	February 2019	Board of Directors/ School Leader
	Establish registration procedures; prepare registration forms; schedule registration events	February 2019	School Leader
	Establish School Safety Committee and begin plans for development of Comprehensive School Safety Plan (CSSP) with Dept of Safety & Homeland Security (DSHS)	February 2019	School Leader/ Board
	Consult with the DDOE Associate for School Climate and Discipline to review students' rights	February 2019	Board of Directors
	Submit Annual report to DDOE	April 2019	School Leader
	Develop food service plan	April 2019	School Leader
	Send Meal benefit forms to households of all students	April 2019 -ongoing	Business Manager
	Submit school calendar and hourly attendance survey to DDOE	April 2019	School Leader
	Prepare information packets for home visits	May 2019	School Leader
	Ensure that student information roll-over happens in e-school	July 2019	School Leader / DDOE
	Finalize planning with food, transportation, and other services	June/July 2019	School Leader and Business manger
	Ensure proper identification of students (IE: free and reduced lunch, special education) to secure funding and support	July 2019	School Leader and Business Manager
	Monitor incoming records of students for completion upon start of school	August 2019	School Leader / Education Director
	Submit copies of signed contracts for student transportation, food services, related services for	August 2019	School Leader /Business Manager/ Board of Directors

	students with special needs, or any organization or entity providing other services.		
	Develop/approve Student Rights & Responsibilities Manual and Code of Conduct with all required Federal and State policies	December 2019	School Leader/ Board of Directors
Personnel	Post for the School Leader and interview for starting date of 9/1/ 2018	May - July 2018	Board of Directors
	Submit written notice to DDOE for hiring of School Leader within 5 days	Late summer/ fall 2018	Board of Directors
	Submit a copy of employee handbook to DDOE	Fall 2018	Board of Directors / School Leader
	Establish Payroll/Benefit Structures	Fall 2018	Board of Directors / School Leader
	Establish processes & set up logistics for staff applications; interviews; contracts; and onboarding new staff	Fall 2018/Winter 2019	School Leader/ Board Support
	Adopt evaluation process for school leader	December 2018	Board of Directors
	Post for teachers and other school staff	January – May 2019	School Leader/ Board
	Complete offers to teachers and assistant teachers	May 2019	School Leader
	Complete interviews and hire Education Director	June 2019	School Leader
	School leader register and attend DPAS II training if they do not have it	Spring 2019	School Leader
	Confirm contracts for related services and others as required by IEP's	May 2019	School Leader
	Contract w/ substitute service or develop substitute coverage plan	May 2019	School Leader
	Identify state online system that will be used for DPAS	June 2019	School Leader

	Confirm all staff credentialing (non-certified, NCLB HQ, new teacher mentoring, DEEDS access, etc.)	July 2019	School Leader
	School Leader Appraisal Completed	July 2019	Board Chair with Board input
	Send documentation of license and certification of teachers hired summer 2019 to DDOE	August 2019	School Leader
	Ensure that all educators meet the certification requirements of charter law and are listed in PHRST and DEEDs	September 2019	School Leader
	Ensure that school is in full compliance for CBC and Child Protection records	Ongoing	School Leader
Professional Development	School Leader attend Montessori PD (choices to be determine with Board)	Fall 2018-Spring 2019 and ongoing	School Leader
	School Nurse to attend DDOE summer school nurse orientation	Summer 2019	School Nurse
	Develop MOU for teachers and the school regarding financial support for Montessori Training	April 2019	School Leader /Board of Directors
	Schedule teachers who require Montessori teacher preparation for training at either at the UD MTPR or with the National Center for Montessori in the Public Sector	Upon Hire but no later than May 2019	School Leader
	Schedule Responsive Classroom Training week for August 2019	By March 2019	School Leader
	Schedule CPR training	July 2019	School Leader / School Nurse if hired
	Staff participate in eSchool Training	June 2019	School Leader/ Education Director/ Business Manager
	Develop and submit a schedule of training for all special education teachers conducted by DDOE	August 2019	School Leader / Education Director
Transportation	Plans for school transportation responses to various contingencies finalized	July 2019	School Leader /Board Committee

	Develop bus routes; finalize transportation plans; conduct training for bus drivers	July 2019	School Leader/ Business Manager
	Submit signed contracts with transportation contractors to DDOE	August 2019	Board Chair/ Business Manager
	Records for school bus drivers and aides are maintained in the Transportation records System (TRS).	Ongoing summer / fall 2019	Business Manager/ School Leader
Governance	SMS Board to work with partners in Sussex County: Leadership Delaware, Horizon Philanthropic, and other community leaders to identify operating board members for SMS	January 2018- December 2019	Board of Directors
	Ensure that meeting dates, agendas, and minutes are published on the website in accordance with 29 Del. C. § 10004.	Ongoing beginning May 2018	Board of Directors / Board Secretary
	Provide Liability insurance coverage documentation to DDEO before hiring School Leader	July 2018	Board Chair/Board Finance Chair
	Submit to DDOE proposed performance agreement	September 2018	Board of Directors Chair
	Submit notice of regular board meetings to DDOE	September 2018	Board of Directors Secretary
	Submit listing of Board Directors and addresses	September 2018	Board of Directors Secretary
	Submit any changes in addresses for board members or new board members within ten days of change. Submit background checks and resumes for new board members. Indicate members in parent and teacher roles.	Ongoing	Board of Directors Secretary
	Submit plan for board governance training	September 2018	Board Vice - Chair
	Board of Directors to attend required DDOE training on finance and due process	As offered 2018-2019	Board of Directors

	Submit to the Department for review a list of timelines for meetings with state central service agencies related to the understanding of state business practices including the Office of the State Auditor, PHRST, First State Financials (FSF) and Statewide Benefits.	September 2018	Board of Directors
	Schedule Board Training with DANA	January 2019	Board of Directors
Fund Raising	Montessori Works secure funding from Longwood Foundation for facility and Capital campaign pre-work to be done as stated below and in facility during application review process so that school has the best opportunity to open on schedule	December 2017	Completed – Board of Directors Montessori Works
	Complete Application for Longwood (Support Letter in Attachments)	March 2018	Board of Directors
	Montessori Works will engage Horizon Philanthropic to begin ground work for a capital campaign in Sussex County to launch upon charter approval. Complete background work for campaign launch including: <ul style="list-style-type: none"> Case statement Develop campaign presentations Identify campaign leaders in Sussex and begin meetings to develop plan Create donation portals Hold a Campaign Kick Off Event Prepare requests from Discover Bank 	January 2018-June 2018	Horizon Philanthropic and Board of Directors
	Sussex Montessori School Board to engage in next phase of capital campaign with Horizon Philanthropic	July 2018-July 2019	Horizon Philanthropic and Board of Directors

	Should the Non-SEA grant application become available SMS will engage with a professional grant writer to assist with the submission supported with funding from Longwood Foundation	January 2018 – July 2019 as grant becomes available	Board of Directors
	Complete Application for Welfare Foundation (Support Letter in Attachments)	September 2018	Horizon Philanthropic and Board of Directors