

2021-22 Planning Year Playbook

Resources and Recommendations
for New School Success

June 29, 2021



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1. Introduction

1.1 About the DC Public Charter School Board

The DC Public Charter School Board (DC PCSB) is the sole authorizer of public charter schools in Washington, DC. In school year (SY) 2021-22, DC PCSB will oversee 68 Local Education Agencies (LEAs) operating 132 campuses, as well as one conditionally-approved school. Charter schools serve nearly half of DC's public school students, coming from every ward in our city.

Our Vision

Every DC student receives a quality education that makes them feel valued and prepares them for lifelong learning, fulfilling careers, and economic security.

Our Mission

DC public charter schools are environments where all students, especially those in historically marginalized groups, thrive. As DC's charter authorizer, we:

- Approve, monitor, and evaluate schools, with an emphasis on equity and academic excellence
- Create policies and conditions to empower educators to do their best work in service of students
- Actively engage families, schools, and communities to inform our decision-making

Our Commitment to Race, Equity, Diversity, and Inclusion Work

Grounded in our race, equity, diversity, and inclusion (REDI) work, we pledge to take time to reflect, listen, and hold space for one another in service of our mission. We are united in the following beliefs and commitments that will guide our authorizing work moving forward:

- We acknowledge the prevalence of interpersonal, institutional, and systemic racism in our country
- We seek to understand the collective impact of racism and inequity on public education and our role in perpetuating these harms
- We believe an excellent school is equitable
- We work to eliminate the impact of racism and inequity on students as DC's public charter school authorizer
- We commit to continuous learning about ourselves, our work, and our city to inform our policies, practices, recommendations, and behaviors

- We engage all voices in our decision-making process thoroughly and consistently, and embrace discord that can come when people share their personal experiences and perspectives on our work

All authorizing decisions are made by a board of seven volunteers, supported by a professional staff of approximately 45. Board members are nominated by the Mayor and confirmed by the DC Council. The Board generally meets on the third Monday of every month. [Board meetings](#)¹ are announced in advance on our website, with all documents available to the public.

1.2 About the Planning Year Playbook

The purpose of the Planning Year Playbook is to provide conditionally-approved schools with the knowledge, resources, and experiences of past new school leaders to have a successful school opening. A school's planning year is defined as the time between a school receiving conditional approval from DC PCSB, usually at a spring Board Meeting (e.g., at the public meeting on April 19, 2021), and its first day of school, usually in August or September of the next year (e.g., August 30, 2022). Just as a football playbook contains the strategies a team will use to win, the Planning Year Playbook seeks to provide new schools with practical “how to” guidance – accumulated from years of new school support and interviews with 28 past new school leaders – so that they can open on time and ready to meet the needs of DC’s students, families, and communities. Each section of the playbook is divided into two parts: pertinent information and recommendations for implementation. The [appendix](#)² in the back contains a toolkit of supplemental resources.

This playbook pertains specifically to a new school’s responsibilities during the planning year. While it attempts to be comprehensive, the Planning Year Playbook may not contain all relevant information for new schools, and it should not be considered legal advice. New school leaders are ultimately held accountable for completing all necessary planning year tasks. We will update this playbook annually to reflect new information and feedback from new schools.

This SY 2021-22 version of the playbook contains new information on the at-risk student enrollment preference, updated guidance on a variety of topics, and advice from school leaders opening new LEAs in fall 2021.

¹ <https://dcpccb.org/events>

² <https://dcpccb.egnyte.com/fil/yXYbiiwDwR>

1.3 Acronyms

Acronym	Definition
ANC	Advisory Neighborhood Commission
BBL	Basic Business License
CofO	Certificate of Occupancy
CSP	Charter Schools Program
COVID-19	Coronavirus disease 2019
DC	District of Columbia
DC PCSB	DC Public Charter School Board
DCPS	District of Columbia Public Schools
DCRA	Department of Consumer and Regulatory Affairs
DME	Office of the Deputy Mayor for Education
EIN	Employer Identification Number
EL	English learner
EMI	Entity Management Identification
ESEA	Elementary and Secondary Education Act
ESSA	Every Student Succeeds Act of 2015
FAR	Financial Analysis Report
FY	Fiscal year
GAAP	Generally Accepted Accounting Principles
IDEA	Individuals with Disabilities Education Act
IEP	Individualized Education Program
IRS	Internal Revenue Service
LGBTQIA+	Lesbian, gay, bisexual, transgender, questioning (or queer), intersexual, asexual, and more
LEA	Local Education Agency
MSDC	My School DC
OCFO	Office of the Chief Financial Officer
OSSE	Office of the State Superintendent of Education
PAVE	Parents Amplifying Voices in Education
PD	Professional development
PK3	Pre-kindergarten for 3-year-olds
PK4	Pre-kindergarten for 4-year-olds
PMF	Performance Management Framework
SEDS	Special Education Data System
SIS	Student Information System
SLED	Statewide Longitudinal Education Data
SNAP	Supplemental Nutrition Assistance Program

Acronym	Definition
SRA	School Reform Act
STAR	School Transparency and Reporting Framework
SWD	Students with disabilities
SY	School year
TAL	OSSE's Division of Teaching and Learning
TANF	Temporary Assistance for Needy Families
UPSFF	Uniform Per Student Funding Formula

2. Planning Year Overview

Also referred to as year zero, the planning year is the timespan between a school receiving conditional approval from DC PCSB and its first day of school. While many new schools experience one planning year, others may require additional time to achieve all of the necessary conditions and be fully ready to open. The following list shows the new schools conditionally approved over the last seven years as organized by their planning year.

New Schools Conditionally Approved Over the Past Six Years		
Planning Year	Grades Served	New Schools Conditionally Approved
2021-22	PK3-PK4	DC Wildflower PCS
2020-21	PK3-5	Global Citizens PCS
	PK3-8	LEARN DC PCS ³
2019-20	5-8	Capital Village PCS
	9-12	Girls Global Academy PCS
	PK3-5	I Dream PCS
	5-8	Social Justice PCS
	6-12	The Sojourner Truth Montessori PCS
2018-19	--	<i>No applications were approved</i>
2017-18	6-8	Digital Pioneers Academy PCS
	4-8	Statesmen College Preparatory Academy for Boys PCS
	Adult	The Family Place PCS
2016-17	9-12 Alternative	Sustainable Futures PCS ⁴
2015-16	PK3-6	Breakthrough Montessori PCS
	9-12 Alternative	Goodwill Excel Center PCS
	PK-8	Rocketship Education DC PCS ⁵
	9-12	Washington Leadership Academy PCS

New schools have responsibilities that fall into two major categories: satisfying all of DC PCSB's conditions and developing a school program that is economically viable and consistent with the charter application. Once a new school meets these objectives, it will be eligible to receive full approval and officially become a DC public

³ LEARN DC PCS received conditional approval in November 2018 and had two and a half planning years from SY 2018-19 through 2020-21.

⁴ Sustainable Futures PCS relinquished its charter at the end of SY 2017-18.

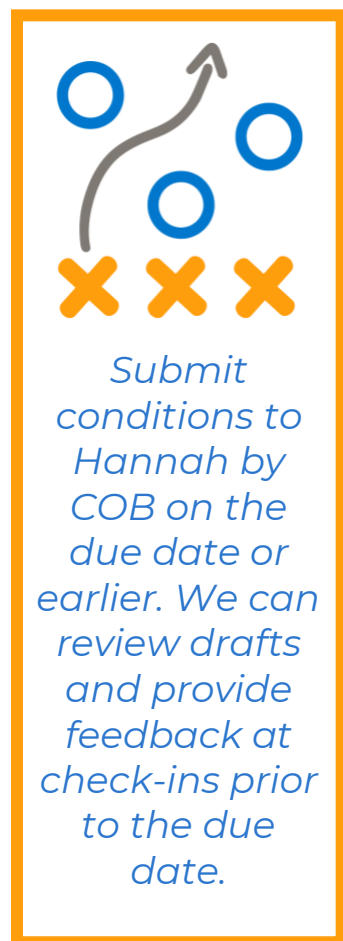
⁵ Rocketship Education DC PCS had two planning years: SY 2014-15 and 2015-16.

charter school. During the planning year, DC PCSB and other organizations are committed to providing new school leaders with school launch support.

2.1 Conditions

What You Need to Know

DC PCSB's conditions are laid out in a new school's unique decision letter, which is agreed to, signed, and returned to DC PCSB by the lead founder or another designated representative. Every condition contains a submission date, the requirements of the deliverable, and the standard by which it will be evaluated. Your school's condition due dates are included in [2.4 Dates to Remember](#). There are two types of conditions: [school-specific conditions](#)⁶ that address areas of weakness in the application [e.g., defining an English learner (EL) model, revising an enrollment ceiling], and [standard conditions](#)⁷ that all schools are responsible for meeting (e.g., securing a facility, creating a discipline policy⁸).



To be considered for approval, condition documents must be submitted by close of business (i.e., 5:30 pm EST) on the due date to Hannah Cousino, manager in the School Performance Department, at hcousino@dcpcsb.org. She facilitates DC PCSB's internal review of each condition and provides you with feedback, if any, or confirmation of approval within one month of submission. Condition due dates are consistent with best practices for a successful opening. We strongly suggest that you adhere to these deadlines; nonetheless, we understand that issues may arise that make a due date untenable.

In these rare cases, the founding team may submit a request for a condition extension in writing to Rashida Young, DC PCSB's Chief School Performance Officer, at ryoung@dcpcsb.org, copying Hannah, at least **ten business days** before the deadline. The request must include a rationale for why the founding team is unable to meet the listed condition deadline, the proposed new deadline, and the steps the

⁶ <https://dcpcsb.egnyte.com/dl/sWI090Dc3E>

⁷ <https://dcpcsb.egnyte.com/dl/dRi9qSpy9ni>

⁸ Discipline policy requirements are included in the LEA Document Submission Calendar, which can be accessed at <https://dcpcsb.egnyte.com/fil/cpdH7YZP2Y#folder-link/>.

team will take to ensure the new deadline is met. DC PCSB leadership may follow up with further questions and will ultimately approve or deny the extension request.

A new school will come before the DC PCSB Board at least twice during the planning year in order to gain full charter approval. You will have the opportunity to speak at each of these public meetings. The first appearance is a public hearing on the school's identified facility location. The hearing should occur no later than the May meeting prior to opening, although we strongly recommend holding the public hearing sooner to aid with student and staff recruitment (see [5.1.1 Facility Identification](#)). The second appearance is once a school satisfies all of the pre-opening conditions described in the signed decision letter. At that meeting, the Board will vote to execute the school's full charter agreement, which includes the facility location. Having a DC PCSB-approved charter agreement is a prerequisite to receiving local payments for the upcoming school year (see [5.4.1 Funding](#)).

If all conditions have not been met or if evidence suggests the school program is not financially viable, staff will recommend to delay or deny full charter approval at the June Board meeting.

Recommendations

- (All schools) New school leaders are welcome to submit deliverables early for feedback, ask for advice, and work with others. One school leader said, "Comple[ing] your DC PCSB conditions early will be helpful so that you can focus on other important aspects of school launch."
- (All schools) All school leaders should see Hannah as a resource and meet regularly with her to ensure that they have a mutual understanding of how to satisfy each condition component.
- (All schools) Asking for multiple condition extensions can lead to a difficult opening or even a decision by DC PCSB to delay the opening until the following year.



Categorize all new school tasks, divide them into parts, create a timeline for completion, assign a point person, and track progress in a shared document.

2.2 Other School Launch Objectives

What You Need to Know

Besides fulfilling conditions, a new school is responsible for a host of other objectives pertaining to its launch, including but not limited to: establishing governance practices for its Board, engaging stakeholders, pursuing grants and other funding opportunities, hiring staff, recruiting students, creating operational systems, solidifying curricula, and preparing the facility. Although this to-do list will be unique to your school, specific guidance on largely universal tasks can be found throughout the playbook.

Recommendations

- (All schools) All recent new school leaders identified time management as the greatest challenge during their planning years. To respond to the challenge, school leaders advised extending grace to yourself, relying on your team and system of support, and developing a thorough project plan.
- (All schools) Clear delineation of school launch responsibilities is key to a successful planning year. In interviewing past new schools, teams that had at least one leader adept at project management felt more prepared to open than those who did not.
- (All schools) Two middle schools and a high school created [checklists](#)⁹ that described the categories, tasks, and action plans for every condition and school launch responsibility. These school teams report that the checklists allowed them to visualize their progress and stay on track.

2.3 New School Launch Support

What You Need to Know

To help ensure that new schools open on time and are prepared to serve students, DC PCSB, the Office of the State Superintendent of Education (OSSE), and other organizations provide founding teams with supports. The main DC PCSB point of contact for all new school leaders is Hannah. Throughout the planning year, Hannah checks in regularly with founding teams to discuss updates. Hannah is also responsible for monitoring new school progress, tracking conditions, and connecting new schools with resources, such as other school leaders, intergovernmental contacts, and trainings.

⁹ <https://dcpcsb.egnyte.com/fl/gO9Aqr8n4c>

OSSE also provides new schools a point of contact during their planning year. Cassie Lynott, from the Division of Systems and Supports, K-12, works with new charter schools to provide access to OSSE resources and information on state requirements. You can reach Cassie at cassie.lynott@dc.gov.

In the months leading up to the first day of school, DC PCSB and OSSE will hold workshops and orientations to prepare founding leadership teams to meet the responsibilities of operating a public charter school in year one and beyond (see [2.4 Dates to Remember](#)). Topics from the [SY 2020-21 trainings](#)¹⁰ included: the revised accountability framework, review and renewal processes, school finance, compliance monitoring, data systems, special populations, school safety, student transportation, and health requirements. These workshops also allow you to meet relevant points of contact at DC PCSB, OSSE, other city agencies, and recently approved schools.

Recommendations

- (All schools) Any founding team member, but especially the head of school, director of operations, and board chair, is encouraged to attend DC PCSB check-ins.
- (All schools) Founding teams are welcome to call or email DC PCSB and OSSE in between scheduled meetings. Especially when teams run into barriers, they should reach out to Hannah for help. In the past, DC PCSB has helped schools overcome barriers with facilities, navigate city agencies, and find resources.
- (All schools) While DC PCSB does not endorse any specific organizations, many local groups provide new school support. These include but are not limited to the [DC Charter School Alliance](#),¹¹ [DC Special Education Cooperative](#),¹² [Education Forward DC](#),¹³ and many others found in this playbook.
- (All schools) In preparation for year one, all schools should consult other sources, like the [School Support Resources](#)¹⁴ page on DC PCSB's website and OSSE's [Start of School Campaign](#).¹⁵ Heads of school, directors of operations, data managers, EL coordinators, and special education coordinators should also attend OSSE's annual start of school trainings.

¹⁰ <https://dcpcsb.egnyte.com/fl/ZkCO4Ublwe>

¹¹ <https://www.dccharters.org/>

¹² <https://specialcoop.org/>

¹³ <http://edforwarddc.org/>

¹⁴ <https://www.dcpccb.org/leading-a-school>

¹⁵ <https://osse.dc.gov/startofschool>

2.4 Dates to Remember – DC Wildflower PCS

What You Need to Know

The following table consolidates important dates during the planning year. It will be updated as more events are confirmed. Please note that some dates may be subject to change.

Legend				
Conditions	My School DC (MSDC)	DC PCSB Board	Finances	Trainings & Events

Month	Date	Event
May	May 14, 2021	Signed decision letter due (includes confirming sites/enrollment ceiling and enrollment update conditions)
June	June 15, 2021	First special populations condition due
	June 15, 2021	First budget condition due
	June 15, 2021	First staffing plan condition due
July	July 23, 2021	Deadline to submit CSP grant application to OSSE
	July 30, 2021	Final special populations condition due
	July 30, 2021	Final budget condition due
	July 30, 2021	Final staffing plan condition due
	July 30, 2021	First key personnel condition due
	July 30, 2021	First 501(c)(3) status condition due
August	Late August 2021*	Deadline to participate in MSDC
September	September 2021*	Fall charter leaders meeting
October	October 7, 2021†	New schools board training
	October 11, 2021	Deadline to submit MSDC data collection
November	November 19, 2021	First CSP semi-annual report due to OSSE
December	December 1, 2021	Deadline to submit CSP reimbursement requests to OSSE for costs obligated in FY21
	December 1, 2021	First facility condition due
	Mid-December 2021*	edFEST – citywide enrollment fair
	December 13, 2021	MSDC lottery application opens
	December 14, 2021	First draft of charter agreement due
January	January 7, 2022	Potential deadline for DC PCSB to notify your ANC and post in DC Register about February

* To be scheduled

† Tentative

Month	Date	Event
		public hearing on facility and June vote for full approval
February	February 1, 2022	Final facility condition due
	February 7, 2022	Potential deadline for DC PCSB to notify your ANC and post in DC Register about March public hearing on facility and June vote for full approval
	February 15, 2022	Second key personnel condition due
	February 15, 2022	First governing board condition due
	February 15, 2022	First discipline policy condition due
	February 15, 2022	Second draft of charter agreement due
	February 22, 2022	Potential public hearing on facility
March	March 1, 2022	MSDC application deadline for grades PK3-8
	March 4, 2022	Potential deadline for DC PCSB to notify your ANC and post in DC Register about April public hearing on facility and June vote for full approval
	March 11, 2022	Deadline for MSDC lottery inputs
	March 15, 2022	Final governing board condition due
	March 15, 2022	Final 501(c)(3) status condition due
	Mid-March 2022*	Spring charter leaders meeting
	March 15, 2022	Potential public hearing on facility
April	April 1, 2022	Final deadline for DC PCSB to notify your ANC and post in DC Register about May public hearing on facility and June vote for full approval
	April 1, 2022	MSDC lottery results are released
	April 2022*	OSSE's New LEA Orientation sessions begin
	April 5, 2022	Final discipline policy condition due
	April 18, 2022	Potential public hearing on facility
	April 22, 2022	Third draft of charter agreement due
	April 27-28, 2022†	New school workshop series with DC PCSB and intergovernmental agencies
May	May 2, 2022	Enrollment deadline for matched students
	May 2022*	OSSE's New LEA Orientation continues

* To be scheduled

† Tentative

Month	Date	Event
	May 16, 2022	Final date for public hearing on facility (or if public hearing was previously held, potential date for vote for full charter approval)
	May 17, 2022	Final key personnel condition due
	May 17, 2022 (or by five days after vote)	Final signed charter agreement due
June	June 1, 2022	SY 2021-22 budget due in Epicenter
	June 2022*	OSSE's New LEA Orientation concludes
	June 20, 2022	Final date for vote on full charter approval
July	July 15, 2022 [†]	Receive first quarterly payment
August	Early August 2022*	Pre-opening site visit from DC PCSB

* To be scheduled

[†] Tentative

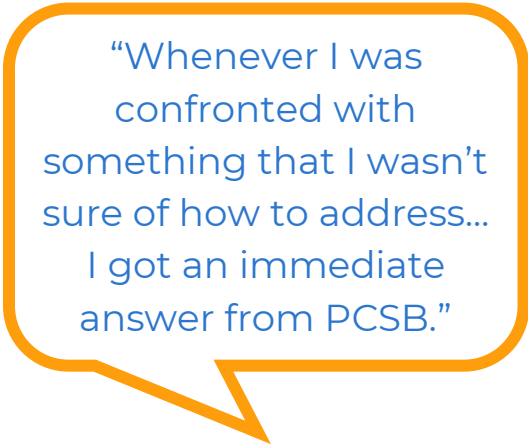
3. Communications

As noted, new school leaders should familiarize themselves with DC PCSB's and OSSE's websites, points of contact, and newsletters during the planning year. While DC PCSB does not endorse any specific organizations, you may also want to subscribe to newsletters from DC education groups like DC Charter School Alliance and the DC Special Education Cooperative to learn about the latest charter news and workshops.

3.1 DC PCSB Communication

3.1.1 DC PCSB Website and Staff Directory

To provide information to its various audiences, the [DC PCSB website](https://www.dcpsb.org/)¹⁶ contains nearly 96,000 pages on the DC charter sector – school profiles, academic and financial performance reports, enrollment trends, and charter agreements – and DC PCSB's processes – its policies, past Board meetings, items open for public comment, past charter applications, and its oversight functions. New schools will



“Whenever I was confronted with something that I wasn’t sure of how to address... I got an immediate answer from PCSB.”

find the [For School Leaders](#)¹⁷ page especially helpful. There you'll find resources pertaining to DC PCSB's accountability system, policies, annual compliance reporting, data collections, special populations, financial oversight, COVID-19 resources, and guidance on ensuring schools are safe and inclusive for LBGTQIA+ and undocumented students. You can also access DC PCSB's data systems (see [5.5.2 DC PCSB Data Systems](#)), a [staff directory](#),¹⁸ and an [organizational chart](#).¹⁹

Recommendations

- (All schools) While Hannah is the main point of contact for new schools, new school leaders are encouraged to connect with other DC PCSB staff via the directory. One leader shared, “Whenever I was confronted with something that I wasn't sure of how to address or handle, I got an immediate answer

¹⁶ <https://www.dcpsb.org/>

¹⁷ <https://www.dcpsb.org/leading-a-school>

¹⁸ <http://bit.ly/DCPCSBStaff>

¹⁹ <https://dcpsb.egnyte.com/dl/TmXp4neEar/>

from [DC] PCSB. They were a strong resource to help us with a sharp learning curve.”

3.1.2 *Wednesday Bulletin and Charter Network*

What You Need to Know

Each week, DC PCSB’s Communications Department releases the [Wednesday Bulletin](#)²⁰ to DC public charter school leaders, intergovernmental agency contacts, and other stakeholders. Past Wednesday Bulletins are archived on the website. Information shared includes notices from DC PCSB, government agencies, and charter support organizations; upcoming data and document submission requirements; and opportunities for school leaders, staff, and parents/caretakers. Anyone may subscribe to the mailing list by contacting wednesdaybulletin@dcpcsb.org. Submissions for the following week’s Wednesday Bulletin are due by 5 p.m. every Friday to wednesdaybulletin@dcpcsb.org. Each entry should be 3-6 sentences long and adhere to the [submission guidelines](#).²¹

The Communications Department also coordinates the Charter Network, which seeks to offer support to school staff responsible for external affairs (e.g., communications, community engagement, and advocacy) and provide space to learn from others. To join, contact Aliya Drake at adrake@dcpcsb.org.

Recommendations

- (All schools) Trainings and taskforces are often advertised in the Wednesday Bulletin. Schools are welcome to participate in them during the planning year.
- (All schools) School staff should subscribe to the Wednesday Bulletin early in the planning year to see a preview of weekly expectations for fully approved schools as well as opportunities they can take advantage of now.
- (All schools) New school leaders are welcome to submit Wednesday Bulletin posts (e.g., community events, professional development opportunities open to other schools, extra supplies) using the process described above.
- (All schools) Schools should designate a member of the staff to join the Charter Network.

²⁰ <https://www.dcpccb.org/report/WednesdayBulletin>

²¹ <https://www.dcpccb.org/submission-guidelines-wednesday-bulletin>

3.2 OSSE Communication

3.2.1 OSSE Website and Key Contacts

What You Need to Know

As the state education agency (SEA), OSSE's [website](#)²² centralizes information for its various audiences: students and families, educators, LEAs and schools, and child development facilities. Notably, the website is where you'll find [data](#)²³ on topics like enrollment and assessments as well as resources pertaining to the [Start of School](#).²⁴ The website also contains OSSE's [organizational chart](#)²⁵ and its [staff directory](#).²⁶

Recommendations

- (All schools) New school leaders should meet OSSE leaders like Christina Grant, the Acting Superintendent as of June 30, 2021, and Shana Young, the Chief of Staff, before opening.

3.2.2 LEA Look Forward and Teaching and Learning Professional Development Bulletin

What You Need to Know

OSSE communicates with its stakeholders through multiple channels, including a weekly and a monthly bulletin. OSSE publishes a weekly round-up of city-wide education announcements, deadlines, and professional development (PD) opportunities called the LEA Look Forward. Anyone can subscribe to the mailing list by contacting OSSE Communications at osse.communications@dc.gov and providing your first name, last name, and email address. For a more in-depth and comprehensive list of PD offerings, OSSE's Division of Teaching and Learning (TAL) disseminates the [TAL PD Bulletin](#)²⁷ on the first Thursday of each month. Teachers, administrators, and school-based staff can subscribe by completing this [form](#).²⁸

Although some events may appear in DC PCSB's Wednesday Bulletin and OSSE's LEA Look Forward and TAL PD Bulletin, these communications generally differ in scope and target audience. DC PCSB's Wednesday Bulletin focuses exclusively on news pertaining to the public charter school sector and is intended for public charter school leaders and other interested parties. OSSE's LEA Look Forward and

²² <https://osse.dc.gov/>

²³ <https://osse.dc.gov/page/data-and-reports-0>

²⁴ <https://osse.dc.gov/startofschool>

²⁵ <https://osse.dc.gov/node/855822>

²⁶ <https://osse.dc.gov/page/osse-key-points-contact-leas>

²⁷ <https://osse.dc.gov/publication/osse-teaching-and-learning-pd-bulletin>

²⁸ <https://dc.us3.list-manage.com/subscribe?u=d899604e6949ede8f0fbd4a36&id=94153dc0fc>

TAL PD Bulletin include updates for both the traditional public school and public charter school sectors.

Recommendations

- (All schools) Trainings, communities of practice, and other professional development events are often advertised in OSSE's LEA Look Forward. Schools are welcome to participate in these during the planning year.
- (All schools) School staff should subscribe to OSSE's LEA Look Forward and TAL PD Bulletin early in the planning year to see a preview of weekly expectations for fully approved schools as well as opportunities they can take advantage of now.

4. Governance

The main governing body of a public charter school is its board of trustees. A charter is awarded to this governing board – **not** the school leader or founder(s). During the planning year, new schools are responsible for three main tasks relating to governance: recruiting and on-boarding board members, establishing compliant systems, and negotiating a charter agreement, which includes finalizing bylaws.²⁹

4.1 Board of Trustees Composition

What You Need to Know

According to the School Reform Act (SRA), DC Code § 38-1802.05, the members of a board of trustees of a public charter school shall be elected or selected pursuant to the charter granted to the school. The board must meet the following requirements:

- An odd number of voting members between three and 15
- Majority DC residents
- At least two shall be parents of a student attending the school (or adult students, if applicable)

As a condition of full charter approval, new schools must identify an SRA-compliant board by March of the planning year (see [2.4 Dates to Remember](#)). To demonstrate that you've met this condition, you will input board members' contact information in the Hub, one of DC PCSB's data systems (see [5.5.2 DC PCSB Data Systems](#)). DC PCSB requires all schools to keep this information up to date, per its [School Transparency Policy](#)³⁰ and the [Data and Document Submission Policy](#).³¹ In addition, DC PCSB staff relies on a current list to send regular communication to board members.

Next, each board member must complete a release form to undergo background checks, which DC PCSB will facilitate in the planning year. Information that may be obtained comes from the following sources: social security number verifications, local criminal and misdemeanor records, federal criminal records, and the national sex offender registry. Once DC PCSB shares the results of these background checks with school leaders, they must resolve any substantial concerns raised. If not already identified during the planning year, within 60 days of school operation, the board must find parent board members (or adult students, if applicable) and conduct backgrounds checks for these members themselves.

²⁹ Bylaws are initially submitted with the charter application and must meet SRA and DC PCSB requirements, as well as comply with all other applicable laws.

³⁰ <https://dcpcsb.org/school-transparency-policy>

³¹ <https://dcpcsb.org/data-and-document-submission-policy>

Recommendations

- (All schools) To create strong boards, founding teams should select members with relevant experience and a record of performance, especially in DC, in areas like operations and finance, law, real estate, education, and community engagement. Leaders should also look beyond their immediate networks to find members with diverse expertise.
- (All schools) Many schools select board members that bring mission-specific expertise. One school prioritized identifying board members that had experience working with adult learners.
- (All schools) While DC PCSB does not endorse any specific organizations, a frequently used resource for new schools is [Education Board Partners](https://edboards.org/),³² (formerly Charter Board Partners) a nonprofit organization that works with DC public charter school boards to recruit and train board members and implement good governance practices.
- (All schools) When asked how he recruited active board members, one new school leader said, “First, we offered a clear and compelling vision that drew attention. Then, we held several open forums to raise the school’s profile. My team reached out to people that I had worked with, and we got recommendations from partners. After building a broad team of support, those who demonstrated the requisite skills, interest, and capacity transitioned into the governing board. As a last step, we engaged Education Board Partners for specific work in building an executive team that included people outside my networks.”
- (Adult schools) Schools that serve an adult student population often recruit adult students to meet the two parent board members requirement.

“We held several open forums to raise the school’s profile. My team reached out to people that I had worked with, and we got recommendations from partners.”

³² <https://edboards.org/>

4.2 Board of Trustees Responsibilities

What You Need to Know

The school's board holds the charter agreement with DC PCSB and is ultimately accountable for school operations and fiduciary oversight. As such, the board of trustees has immense responsibilities well beyond those of most traditional non-profit boards.



One such responsibility is to adhere to the [Open Meetings Act](#),³³ DC Code § 2–571 *et seq.* The Office of Open Government enforces compliance with the Act beginning in year one. All schools will need to sign up for posting access on the [Central Meeting Calendar](#).³⁴ You can contact the Office of Open Government with questions at (202) 481-3411 or opengovoffice@dc.gov

Some responsibilities – such as creating a board meeting calendar, approving student/family policies, and recording board meeting minutes – are captured in the [LEA Document Submission Calendar](#).³⁵ Beginning in year one, DC PCSB uses this [criteria](#)³⁶ to review board meeting minutes for compliance. These documents and many others are also required to be posted on the school's website, per DC PCSB's [School Transparency Policy](#).³⁷ Other board responsibilities include establishing [lottery preferences](#),³⁸ if desired, and designating a point of contact to receive community complaints, and responding to escalated complaints per the [DC PCSB Community Complaint Policy](#).³⁹ More

information on DC PCSB compliance requirements and policies will be shared during the new school workshops in the spring of the planning year.

To understand all of their various responsibilities, many board member resources and trainings are available. The Office of Open Government posts Open Meetings

³³ <https://code.dccouncil.us/dc/council/code/titles/2/chapters/5/subchapters/IV/>

³⁴ <https://www.open-dc.gov/documents/instructions-posting-meetings-central-meeting-calendar>

³⁵ <https://dcpcsb.egnyte.com/dl/Um3TDliQ2x/>

³⁶ <https://dcpcsb.egnyte.com/dl/H4S5BmAl5i>

³⁷ <https://dcpcsb.egnyte.com/fl/cpdH7YZP2Y#folder-link/>

³⁸ <https://www.myschooldc.org/node/116>

³⁹ <https://dcpcsb.org/community-complaint-policy>

Act resources on its [website](#)⁴⁰ and has hosted school-specific [trainings](#).⁴¹ The DC Bar Pro Bono Center provides many [resources](#)⁴² for non-profit boards. Other past opportunities include a DC PCSB-led [training](#)⁴³ on addressing community concerns and a joint Education Board Partners and Parents Amplifying Voices in Education (PAVE⁴⁴) [training](#)⁴⁵ on elevating parent voice with an accompanying [self-assessment tool](#).⁴⁶ DC PCSB's legal department will also provide a training in September of the planning year to help new school boards understand their responsibilities under the SRA (see [2.4 Dates to Remember](#)).

Recommendations

- (All schools) All leadership teams from the SY 2019-20 new school cohort state that forming committees early in the planning year and maintaining regular communication promoted strong board engagement. Some used informal evaluation criteria to evaluate each member's contributions toward their strategic plan.
- (All schools) While DC PCSB does not endorse any specific organizations, Bellwether Education Partners published [Charter School Boards in the Nation's Capital](#),⁴⁷ a report that explores the relationship between DC charter boards and school quality using quantitative survey data. The authors found that board members of high-quality schools were more knowledgeable about the school's quality ranking, the school's percentage of low-income students, and the school's financial position; engaged more in strategic planning, monthly meetings, and specific trainings; and were more likely to evaluate their school's leaders and incorporate staff satisfaction into these evaluations.
- (All schools) New school board chairs recommend connecting with board members from established schools with similar grade bands, missions, or locations to learn best practices. These conversations can inform board goal-setting and training. DC PCSB can help facilitate board introductions.
- (All schools) Past new school leaders recommend that during the planning year, the board, in collaboration with the head of school, should outline its roles and responsibilities, including the board meeting schedule, minutes

⁴⁰ <https://www.open-dc.gov/>

⁴¹ <https://www.open-dc.gov/documents/oma-training-public-charter-schools-boards-trustees>

⁴² <https://www.lawhelp.org/dc/resource/serving-on-the-board-of-directors#manual>

⁴³ <https://dcpcsb.egnyte.com/dl/7FjQ8FdTVS>

⁴⁴ <http://www.dcpave.org/>

⁴⁵ <https://dcpcsb.egnyte.com/dl/OBSp9RV2Dz>

⁴⁶ <https://dcpcsb.egnyte.com/dl/tq7CBFUnmq>

⁴⁷ <https://bellwethereducation.org/publication/charter-school-boards-nation%E2%80%99s-capital>

record-keeping, strategic goals, leader evaluation, and school-specific launch tasks that the board can complete.

4.3 Charter Agreement Negotiations

What You Need to Know

A charter agreement is a legally binding agreement between a public charter school's board and DC PCSB that governs the terms of the public charter school's operations and DC PCSB's oversight. It is comprised of a main agreement document and accompanying attachments. Successfully negotiating a charter agreement is a condition for full charter approval (see [2.4 Dates to Remember](#)). The table below shows the charter agreement sections and attachments.

Elements of the Charter Agreement	
Sections	1. Establishment of the School 2. Educational Program 3. Administration and Operation 4. Governance 5. Financial Operation and Record Keeping 6. Personnel 7. Reporting Requirements 8. Compliance 9. Charter Renewal, Revocation, and Termination 10. Other Provisions
Attachments	A. Proposed Rules and Policies for Governance B. Articles of Incorporation and Bylaws C. Procedures to Ensure Health and Safety of Students, Employees, and Visitors D. Assurance to Seek, Obtain, and Maintain Accreditation E. Relationship between School and Employees F. Random Selection Process (if not participating in MSDC) G. Insurance Requirements H. Key Personnel I. Graduation Requirements (if applicable)

DC PCSB provides new schools with a guide to the charter agreement process, which the school should read through before beginning negotiations. The draft charter agreement and attachments are created using DC PCSB templates and language from the school's application. DC PCSB sends this draft to the school in August. The school is then responsible for filling in incomplete or highlighted sections, responding to comments, and tracking all changes (using the "Track

Changes” function on Microsoft Word). The school must submit its first draft of the charter agreement by mid-December or mid-January (depending on the year in which the school received conditional approval). The final draft, with all feedback and revisions incorporated to DC PCSB’s satisfaction, is due, at the latest, in May. Draft charter agreement submission dates and deliverables can be found in the decision letter and in [2.4 Dates to Remember](#).

Goals are a crucial part of the charter agreement; therefore, goals negotiations are handled separately from the overall charter agreement process to allow for more timely back-and-forth between the school and DC PCSB. Please contact Quinhon N. Scott, specialist in the School Performance Department, at gscott@dcpcsb.org regarding goals negotiations.

Recommendations

- (All schools) To aid in charter agreement negotiations, DC PCSB recommends that you obtain legal counsel or enlist a board member who is a lawyer.
- (All schools) While DC PCSB does not endorse specific organizations, many schools use [DC Bar Pro Bono](#)⁴⁸ to connect with legal counsel.
- (All schools) New schools should look at recent charter agreements of schools with similar grade bands and/or missions to inform their negotiations process. Every agreement can be found on the DC PCSB website under [Charter Agreements and Amendments](#).⁴⁹
- (All schools) Goals must be SMAART – specific, measurable, ambitious, achievable, relevant, and time-bound. They are also one legal standard against which DC PCSB will determine whether a charter school should continue in operation or be closed. To feel confident about your goals, it is important to familiarize yourself with DC data, including but not limited to rates of achievement and growth on state assessments, attendance, and re-enrollment.
- (Alternative schools) For schools searching for alternative measures, looking nationally at educational data is helpful. While DC PCSB does not endorse any specific organizations, many alternative schools have sought the support of [A-GAME](#),⁵⁰ a collaboration between the National Charter School Institute and Momentum Strategy & Research, to help craft goals.

⁴⁸ <https://www.dcb.org/pro-bono/volunteer/transactional.cfm>

⁴⁹ <https://www.dcpccb.org/report/charter-agreements-renewals-reviews-amendments>

⁵⁰ <https://nationalcharterschools.org/a-game-grant/>

5. School Operations

School operations encompass activities pertaining to recruiting students, hiring staff, identifying a facility, establishing financial oversight, and connecting with data systems. For more detailed information and resources pertaining to these topics and others, you may wish to consult the [2014 FOCUS Operations Manual](#).⁵¹

5.1 Facilities and Community Engagement

5.1.1 Facility Identification

What You Need to Know

As a condition for full charter approval, every new school must secure a “sufficient and appropriate” facility by submitting a letter of intent or lease agreement (see [2.4 Dates to Remember](#)). If necessary, you will provide updated financial projections. When creating a facility identification timeline, you should consider the following factors:

- **DC PCSB’s timing requirements.** DC PCSB must hold a public hearing on the proposed location no later than May prior to opening. As written in our [Advisory Neighborhood Commission \(ANC\) Notification Policy](#),⁵² DC PCSB staff must provide notice to the DC Register and the ANC commissioner of the facility’s location at least 30 business days in advance of the hearing. Therefore, if we hold the public hearing on your school’s facility at a DC PCSB Board meeting on April 18 we will need to notify the relevant ANC Single-Member District Commissioner and post notice in the DC Register by March 4.
- **MSDC’s timing requirements.**⁵³ Until a school provides MSDC with a signed lease or valid title, it will come up at the bottom of all searches for schools in a particular location on MSDC’s website. Moreover, if MSDC does not have a signed lease or valid title by early February (last year’s date was February 9), MSDC will not match any applicants to your school. Instead, applicants will be matched to another school and be placed on the waitlist for yours. After



⁵¹ <https://focusdc.org/sites/focusdc.org/files/opsmanual.pdf>.

⁵² <https://dcpcsb.org/anc-notification-policy>

⁵³ New schools are not required to participate in MSDC. Please see [5.2.2 Student Applications](#) for more information on school-led lotteries.

lottery matches are made, your school may make waitlist offers only if you have provided a signed lease or title. A school without a signed lease or title by the MSDC deadline will face the very real prospect of a delay in opening.

- **Recruitment challenges.** It is very difficult to recruit students when you can't say where you will be located, especially if you will be participating in events like edFEST (see [5.2.1 Student Recruitment](#)). Schools that open under-enrolled often face compounding issues like lack of funding for programming.

Recommendations

- (All schools) DC PCSB strongly urges new schools to secure their facility as early in the planning year as possible.



"Start lease negotiations in October or even sooner."

- (All schools) DC PCSB strongly encourages new schools to establish relationships with their ANC's long before DC PCSB's formal notification to them. Per DC Code § 1-309.10(b) and the [ANC Notification Policy](#),⁵⁴ the Board assigns "great weight" to the concerns raised by ANC's. One school leader said, "Engage your ANC early and often!"
- (All schools) Schools should consider their space in their first few years to be a "starter home." Later on, enrolled families can help the founding teams find the school's "forever home."
- (All schools) All new school leadership teams said that facilities negotiations took longer than expected. They stressed the importance of starting the search process as early as possible and developing a list of facility must-haves and nice-to-haves. One leader advised, "Start lease negotiations in October or even sooner." Another leader added, "It's important to be flexible in the process while setting up systems that will keep the process moving forward like establishing a facilities team and a weekly meeting. It will also be great



"It's important to be flexible while setting up systems that will keep the process moving forward like a facilities team and a weekly meeting."

⁵⁴ <https://dcpcsb.org/anc-notification-policy>

to partner/hire an organization that supports charter schools with facilities.”

- (All schools) One school leader shared, “In some ways, looking for acceptable ‘business real estate’ may be easier to find than traditional school space...if you are okay with the extra costs of commercial real estate. [Our management organization’s] deep expertise in securing facilities was a critical success factor in moving as fast we did in securing a lease and preparing the facility for our first students.”
- (All schools) Securing a facility is an arduous process, but there are charter support organizations that can help. While DC PCSB does not endorse any particular organization, the DC Charter School Alliance advocates for public charter schools to be able to access buildings across DC. [Building Hope](#),⁵⁵ [Menkiti Group](#),⁵⁶ [Charter School Development Corporation](#),⁵⁷ [Level Field Partners](#),⁵⁸ and [Building Pathways](#)⁵⁹ are examples of organizations that have provided charter incubation, facility development, and/or financing support. One school leader advises, “find a commercial broker who will work on your behalf. Find that person early.”
- (Schools participating in MSDC) edFEST, DC’s citywide enrollment fair, usually takes place at the DC Armory in mid-December. The MSDC applications for grades 9-12 are usually due in early February, and applications for grades PK3-8 are due in early March. And, as noted, MSDC’s cutoff for matching students is in early February. New schools that plan to participate in the common lottery should use these dates as benchmarks for facility identification.

5.1.2 Community Engagement

By forging respectful and consistent relationships with stakeholders like ANC commissioners, ward education council members, nearby schools, and neighbors, you



⁵⁵ <http://buildinghope.org/>

⁵⁶ <https://www.menkitigroup.com/>

⁵⁷ <https://csdc.org/>

⁵⁸ <https://levelfieldpartners.com/>

⁵⁹ <https://www.bpathways.org/>

can spread the mission of your school and become a positive community member. In preparation for the public hearing on the school's facility, DC PCSB staff will ask the founding team to present evidence of its community outreach, ANC engagement, and student recruitment efforts. You may use this template for a [community engagement tracker](#).⁶⁰ School leaders will also answer questions such as the following:

- Describe the neighborhood of the proposed location (e.g., residential, commercial, Metro-accessibility, other schools, recreational facilities).
- Describe all outreach that has been done in the local community of the proposed location. If the school intends to co-locate, please describe this relationship. Submit documentation of engagement with neighbors, ANC commissioners, nearby schools, and other community partners.
- Describe all student recruitment efforts you have made or will make in the local community of the new school location and across DC. Include how many students have enrolled (or applied), and what contingencies you have developed in case the location enrolls fewer students than anticipated.

In recognition of how crucial, yet challenging, community engagement can be for new schools, we encourage you to contact Tomeika Bowden, DC PCSB's Chief Communications Officer, at tbowden@dcpcsb.org.

Recommendations

- (All schools) New school leadership teams should make at least one formal presentation at their ANC's monthly meeting. Past school leaders have reported that it may take repeated efforts to get on an ANC's agenda.



"The most important and difficult lesson is that it takes time and personal presence... Be in the spaces where the community lives."

- (All schools) When asked about how to conduct effective community outreach, one school leader advised, "The most important and difficult lesson is that it takes time and personal presence. You will need tough skin and the ability to see through initial resistance, which may present as intense and personal, to see the core adaptive issues that the community presents. Be in the spaces where the community lives. The forums and events were important for one level of community support and engagement. The ANC and community-based

⁶⁰ <https://dcpcsb.egnyte.com/dl/qIHGiV3C8D>

organization meetings were important for another. Additionally, there was a level of outreach that is specific to the education reform community. Work within these tiers of community engagement at different times and in a myriad of forms.”

- (All schools) Neighbors of public charter schools have shared that trash, traffic, and parking can be major concerns. Develop pick-up and drop-off plans, staff placement on student transportation routes, designated parking areas, and trash collection patterns. Share these with neighbors and collaborate. When appropriate, work with the DC Department of Transportation on plans to facilitate traffic flow.
- (All schools) Because new schools are likely to change their location within the first few years of opening, you should extend your outreach to ANC commissioners, civic leaders, and other community members outside of your initial facility’s immediate location to foster more positive relationships.

5.1.3 Pre-Opening Site Visit

What You Need to Know

After a school is fully approved by DC PCSB in June (at the latest), and a few weeks before the first day of school, DC PCSB staff will conduct a pre-opening site visit of the facility. The school must meet all safety and compliance requirements found in the [Pre-Opening Site Visit Checklist](#)⁶¹ to operate at the proposed facility. This visit consists of a review of all documentation and a tour of the facility. Failure to pass the pre-opening site visit could delay or prevent the school from opening that year. Some of the items, like the Certificate of Occupancy (CofO) and the Basic Business License (BBL), require coordination with the DCRA or other agencies; thus, they will take longer for the school to obtain.

Recommendations

- (All schools) Past schools have nearly experienced a delay in opening for not having a BBL or completed employee background checks. Schools should begin



⁶¹ <https://dcpcsb.egnyte.com/dl/MFPiki4aic>. This checklist is subject to revision by DC PCSB. Updates will be shared with the founding team during the planning year.

working on these requirements as soon as they have access to their facilities and staff.

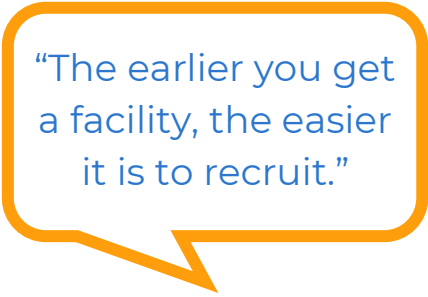
- (All schools) DC PCSB staff recommends that new schools compile all pre-opening site visit documents in an online folder categorized by area of review. (All schools) One new school leader was able to expedite processing for paperwork at DCRA by visiting its offices in person.
- (All schools) Co-located schools should review their lease agreements to determine if they will need separate documentation from DCRA. One middle school that co-located in year one was covered by the other school's CoFO.

5.2 Student Recruitment, Application, and Enrollment

5.2.1 Student Recruitment

What You Need to Know

Executing a robust student recruitment strategy is essential to meeting enrollment targets and staying on budget. In its charter application, each new school will have provided its student recruitment plan and enrollment policies. A recruitment plan will have met the standard for approval per the Charter Application Guidelines if it “is designed to specifically attract the school’s target population without excluding any students, regardless of race, ethnicity, national origin, ability, language ability, religion, gender, sexual orientation, and gender presentation” (p. 26).⁶²



“The earlier you get a facility, the easier it is to recruit.”

Executing a student recruitment plan requires strong and disciplined project management and clarity on the school’s story. Regardless of the method of engagement, you should set goals and track recruitment efforts through interest forms and outreach trackers.

Recommendations

- (Elementary, middle, high schools) Past new schools noted that the timing of securing a facility impacted student recruitment efforts. At events like edFEST, families frequently asked where the school would be located and would not commit to enrolling their students until a facility was announced, resulting in

⁶² <https://dcpcsb.org/start-charter-school>. Please note that the guidelines are subject to revision.

many interested families choosing other schools. As one school leader stated, the “earlier you get a facility, the easier it is to recruit.”

- (All schools) Two school leadership teams wished they had hired a full-time recruitment person at the start of the planning year to lead these efforts.
- (All schools) In reflecting on COVID-19’s impact on recruitment, one school leader shared, “We were still able to implement a robust recruitment plan that included five key strategies: virtual open houses, virtual language classes, canvassing weekly in the community, direct mailing/social media marketing, and recruitment events. One of the highest leverage strategies for student recruitment is to host pilots/programs throughout the planning year for children to participate in. This will likely lead to students applying for your school.”
- (All schools) One new school leader shared that effective recruitment strategies included “starting early, tracking all kinds of data (not just contact info but background info on the family, types of contact, success rate, last engagement, likelihood of enrolling), promoting at DCPS elementary schools (or other feeder schools based on the school’s grade band), making sure that info sessions were differentiated and always had a student-centered workshop for kids to build something they could take home, keeping up communication, investing early in a Family Engagement Coordinator, [and] giving families my contact info and always following up personally.”
- (All schools) Student recruitment is an “all hands-on deck” effort leading up to October Count Day.⁶³ Some of the best ambassadors for your school are teachers and enrolled parents and students. Include them early in the recruitment effort and invite them to attend events.

“One of the highest leverage strategies for student recruitment is to host pilots/programs throughout the planning year for children to participate in.”

⁶³ OSSE is required to annually collect enrollment counts of all students attending public and public charter schools in the District, children in community-based organizations receiving PK Enhancement funds, and students whose tuition is paid for with District funds. This count must be completed on October 5, or the following business day, of each school year. OSSE is then required to conduct an audit to verify the accuracy of the enrollment counts including DC residency status.

- (Elementary, middle, high schools) One new middle school intentionally began in sixth grade so as to sync up with DCPS's grade configurations. The founder established relationships with DCPS elementary schools in Wards 7 and 8, the intended location of the new school, and her team gave presentations for their fifth graders. As the school leader shared, "Our most successful recruiting event was actually going to an elementary school and teaching a 30-minute robotics lesson to scholars directly, which got them excited for middle school! At edFEST, we also brought our curriculum-aligned robots with sample code. We approached every single person and had an open space. No one sat behind the table."

5.2.2 *Student Applications*

What You Need to Know

New schools that intend to join the common lottery should contact Aryan Bocquet, Director of Partnerships and Engagement at MSDC, at aryan.bocquet@dc.gov by the summer prior to opening. School profiles on MSDC must be completed before the common application opens in early December. Aryan also serves as the point of contact for edFEST, DC's annual PK3-12 school fair where families can learn about the city's public school options. In order to participate in edFEST, you must provide MSDC with a Certificate of Insurance.

Schools that do not seek to participate in the common lottery must provide a well-developed strategy for managing this process in the application. These schools often seek to serve an alternative or adult population, and they have more frequent admissions windows. As part of the annual [LEA Document Submission Calendar](#),⁶⁴ schools that do not participate in MSDC must upload their student application through Epicenter, one of DC PCSB's data systems.

As families prepare to submit applications, schools should train their front desk staff to appropriately answer questions, especially those that pertain to enrolling a student with a disability or an English learner. To monitor adherence to open enrollment requirements for special populations, DC PCSB conducts the [Mystery Caller Initiative](#).⁶⁵ Since 2012, DC PCSB annually calls every school posing as a parent or guardian and inquires about enrolling a student with a disability or an English learner. If a school gives an unclear or inappropriate answer, DC PCSB will call a second time to determine if there is a systemic issue. Failing both rounds can result in the DC PCSB Board issuing a formal "Notice of Concern" at a public meeting. You

⁶⁴ <https://dcpcsb.egnyte.com/fl/cpdH7YZP2Y#folder-link/>

⁶⁵ <https://www.dcpccb.org/policy/open-enrollment-policy>

will participate in a modified version of the Mystery Caller Initiative during the planning year. For more information, reach out to Hannah.

Throughout the application and enrollment process, DC PCSB will ask for updates on student recruitment from new school leaders to ensure that they are on track to establish a program that is economically viable and consistent with the charter application.

Recommendations

- (All schools) To train staff to respond appropriately to application and enrollment questions for special populations, consult the DC Special Education Cooperative's [talking points](#),⁶⁶ My School DC's [frequently asked questions](#),⁶⁷ and the DC Office of Human Rights' [language access toolkit](#).⁶⁸
- (Elementary, middle, high schools) New schools that will participate in the common lottery should review the MSDC [FAQ](#)⁶⁹ page to best answer families' questions on the application and enrollment processes.

5.2.3 Student Enrollment

What You Need to Know

After a student submits an application to attend a school, the randomized lottery is held. The school then notifies the student's family of an available slot. Next, the family accepts the offered slot and completes both enrollment and residency verification forms. The school inputs data from these forms into their student information system (see [5.5.1 Student Information Systems](#)) and stores these forms in a secured location in preparation for the pre-opening site visit and annual enrollment audit. As part of the enrollment packet, you must provide the OSSE [Home Language Survey](#)⁷⁰ to all students who are enrolling in a DC public school **for the first time** (see page 6 of OSSE's [Delivering Education Services to English Learners](#)⁷¹). Once students begin attending school, they reach the final stage of enrollment, Stage 5. For more information on enrollment, check out OSSE's [enrollment audit tools and trainings](#).⁷²

⁶⁶ <http://bit.ly/SPEDTalkingPoints>

⁶⁷ <https://www.myschooldc.org/fag/faqs>

⁶⁸ <https://ohr.dc.gov/page/LAportal/toolkit>

⁶⁹ <https://www.myschooldc.org/fag/faqs>

⁷⁰ <https://osse.dc.gov/publication/osse-home-language-survey>

⁷¹ <https://osse.dc.gov/publication/delivering-education-services-english-learners-policies-and-procedures-administrators>

⁷² <https://osse.dc.gov/service/supporting-families-supporting-schools-enrollment-season-2020-21>

Schools that are not participating in MSDC must make sure the student application form is different than the student intake or enrollment forms. The latter may ask for information about special education, race, and income; however, because these questions may discourage an individual from applying, they can't be asked in the student application filled out prior to the lottery. If your school is not participating in MSDC, you will submit the Student Application form to Epicenter per the [LEA Document Submission Calendar](#)⁷³ to ensure compliance. All schools, regardless of whether or not they are participating in MSDC, will be required to submit their Student Enrollment Forms on Epicenter.

Recommendations

- (All schools) The designated enrollment point of contact should plan to attend OSSE's enrollment audit trainings that occur in the spring and summer before the school's opening.
- (All schools) To allow for virtual and socially distanced enrollment, many schools mailed matched families enrollment packets with pre-stamped and pre-addressed envelopes for return. Others ensured that all documents were included in a single PDF file sent to families. Although DC PCSB does not endorse any particular organization, one new school invested in the online portal and mobile application [SchoolMint](#).⁷⁴

5.3 Leadership and Staff Hiring

5.3.1 Key Personnel Identification

What You Need to Know

Key personnel refers to the administrative team running the school in the first year of operation and beyond. While this team will look different for each school depending on its model, you must identify key personnel as part of the founding group for the applicant to meet the "founding group ability" standard for approval. Once a school becomes conditionally approved, it is responsible for completing the following two action items pertaining to key personnel.

First, you will negotiate a list of key personnel positions that will be an attachment to the charter agreement. Please note that, especially in the early years, one person may wear "many hats" and hold multiple key personnel positions. Unless the school provides a compelling reason, the following positions will be included in the key personnel attachment:

⁷³ <https://dcpcsb.egnyte.com/dl/Um3TD1iQ2x/>

⁷⁴ <https://www.schoolmint.com/>

- Board Chair
- Chief Academic Officer/Principal
- Chief Financial Officer
- Data Manager
- Director of Operations
- English Learner Coordinator
- Head of School
- Special Education Coordinator

Adult schools should notify DC PCSB if they will not be accepting Individuals with Disabilities Education Act (IDEA) Part B funding⁷⁵ so that their key personnel list will not include a special education coordinator.

Second, you must hire all key personnel as a condition for full charter approval (see [2.4 Dates to Remember](#)). The names of these people are not included in the key personnel attachment, but all positions must be identified by the end of the planning year, according to the dates listed in the decision letter. Each key personnel must have relevant experience and a record of performance satisfactory to DC PCSB. Should any key personnel leave during the planning year, the school must replace the founding team member with someone with similar experience and record of performance satisfactory to DC PCSB.

Many schools contract with organizations to provide services in areas like finance, data management, and special education compliance. Nonetheless, DC PCSB will not accept a third-party vendor as fulfillment of a key personnel position. Instead, all new schools must identify a qualified and experienced staff member to oversee vendor work and serve as DC PCSB's point of contact.

Recommendations

- (All schools) The majority of recent new schools shared that strong leadership – board, instructional, and operational – was essential to starting their first year prepared. One school conducted a gap analysis of the founding leadership, which enabled them to hire smarter. As a result, their team was able to execute planning year tasks efficiently with the most equipped people completing tasks within their respective wheelhouses.



⁷⁵ Adult education schools have the option of “opting in” or “opting out” of Part B IDEA funding on an annual basis. See [6.1 Special Education](#) to learn more.

- (All schools) One new school memorialized its [founding principal selection process](#)⁷⁶ to share with future school leaders, recommending that you generate buzz, follow-up mass emails with individualized ones, offer a referral bonus, and use LinkedIn and other common connections.
- (All schools) While DC PCSB does not endorse any particular platform, new schools use a variety of platforms to advertise for key personnel positions, including:
 - [DC PCSB's Job Opportunities Page](#)⁷⁷
 - [Indeed](#)⁷⁸
 - [Teach for America's TFAConnectBETA](#)⁷⁹
 - [YEP DC](#)⁸⁰
 - [Leadership for Educational Equity Job Board](#)⁸¹
 - [Idealist](#)⁸²
 - [LinkedIn Jobs](#)⁸³
 - [EdPlus Talent Trove](#)⁸⁴

5.3.2 Teacher and Staff Recruitment

What You Need to Know

Hiring all year one staff is not a requirement for full charter approval, but as the vote approaches, DC PCSB will inquire about each new school's progress in staff recruitment. The School Safety Omnibus Amendment Act of 2018, DC Code § 38-951 *et seq.*, describes the due diligence requirements regarding staff to prevent and address sexual abuse. DC PCSB will check that all staff and volunteers that work with students for 10 hours/week have passed criminal background checks during the pre-opening site visit (see [5.1.3 Pre-Opening Site Visit](#)).

Recommendations

- (All schools) The resources listed above in [5.3.1 Key Personnel Identification](#) to can also be used by new schools to identify teachers and other staff positions.
- (All schools) Many school leaders have shared that they wish they began the hiring process sooner. One school leader reflected, "During our planning year,

⁷⁶ <http://bit.ly/WLAPrincipal>

⁷⁷ <https://www.dcpsb.org/submit-job-opportunity>

⁷⁸ <https://www.indeed.com/hireV2?hl=en&co=US>

⁷⁹ <https://www.teachforamerica.org/life-as-an-alum/alumni-resources/tfa-connect>

⁸⁰ <http://www.youngedprofessionals.org/yep-dc-get-involved.html>

⁸¹ https://educationalequity.org/job-board/post_an_open_role

⁸² <https://www.idealists.org/en/?searchMode=true&type=JOB>

⁸³ <https://www.linkedin.com/jobs/>

⁸⁴ <https://edplusconsulting.com/>

I would have interviewed and brought on three additional staff members from the start to focus on community engagement, operations, and special education.”

- (All schools) When reflecting upon the keys to first year success, many schools mentioned the importance of hiring staff aligned to the job responsibilities and committed to the mission.
- (All schools) One school leader shared, “We used JazzHR to hit all paid and free job boards, leveraged our partnerships with EL Education and Teach for American to also post our jobs, and held a few in-person events. Indeed was our most helpful job board. We wrote our job descriptions to say clearly why our school is different, and staff were drawn to our school model and vision.”
- (All schools) To allow for more voices to be heard in its hiring process, one school invited students and families to participate in staff interviews.

“We used JazzHR to hit all paid and free job boards, leveraged our partnerships with EL Education and Teach for America, and held a few in-person events. Indeed was our most helpful job board.”

5.4 Finances

5.4.1 Funding

School funding comes from a combination of three sources: local funds, as allocated on a per-pupil basis through the [Uniform Per Student Funding Formula \(UPSFF\)](#),⁸⁵ federal funds, as administered by OSSE; and philanthropic contributions and other grants. The SY 2021-22 UPSFF will be released when the Mayor’s budget is finalized in the coming weeks.

During the planning year, a major source of funding for new public charter schools comes from OSSE’s [Charter Schools Program \(CSP\) Planning and Implementation](#)

⁸⁵ <https://osse.dc.gov/publication/2020-21-uniform-student-funding-formula-upsff-payment-letter>

[grant](#).⁸⁶ Through this grant, new LEAs can receive up to \$1.5 million to be used over 18 to 36 months. Eligibility requirements include:

- Receiving conditional approval from DC PCSB.
- Meeting the requirements set forth under [Title IV, Part C of the Elementary and Secondary Schools Act](#)⁸⁷ (ESEA), as amended by the Every Student Succeeds Act of 2015 (ESSA), which include meeting the federal definition of a charter school.
- Serving students in grades PK3-12 or offering a high school diploma. Adult-serving schools that do not offer a high school diploma are **not** eligible for this funding.

LEAs that apply should also be aware that as a federal grant, CSP has specific procurement requirements (see 5.4.3 Procurement Contracts), and that all OSSE grant funding is paid on a reimbursement basis. You can contact Stacy Kirk, OSSE program analyst, at stacy.kirk@dc.gov for more information.

As a school approaches the end of its planning year, it must register with the DC Office of the Chief Financial Officer (OCFO) in order to receive timely UPSFF payments. The main point of contact for charters at OCFO is Alonso Montalvo, Agency Financial Manager, at alonso.montalvo2@dc.gov. In early 2022, OCFO will contact the school and ask for the following paperwork:

- Internal Revenue Service (IRS) letter assigning you an employer identification number (EIN)
- IRS determination letter granting you 501(c)(3) status
- A certificate of incorporation for the charter school issued by DCRA
- The ACH Vendor Payment Enrollment Form and IRS Form W-9
- Official letter sent directly to OCFO by the banking institution that provides the school's name, the school officer on the account, the account number, the routing number, and the bank's contact
- A letter from DC PCSB verifying the approval of your completed application to operate a public charter school in DC

Recommendations

- (All schools) Most new schools credited robust funding as a key to success. Whether through public funds, grants, or fundraising, adding reserves helps alleviate pressures during the planning and launch years.

⁸⁶ <https://osse.dc.gov/service/charter-schools-program-planning-and-implementation-grant>

⁸⁷ <https://oese.ed.gov/files/2019/11/Statute-for-website.pdf>

- (All schools) New schools have applied for and won additional planning year support and funding through organizations like [Camelback Ventures](https://www.camelbackventures.org/),⁸⁸ [Education Forward DC](http://edforwarddc.org/),⁸⁹ and [CityBridge](https://citybridge.org/),⁹⁰ among others.
- (Adult schools) Because adult schools are not eligible to receive the CSP grant, it is recommended that they, especially, pursue planning year funding by means of philanthropic contributions and private grants.

5.4.2 Financial Systems

What You Need to Know

To achieve a successful opening, schools must develop and implement effective financial systems. Public charter schools receive millions of DC taxpayer dollars and must take care that funds are appropriately spent with adequate protections against fraud. Payment of local funds is primarily front-loaded, meaning new schools must plan carefully to ensure sufficient funds are available for the whole year. Federal funding comes with rigorous rules for its use, and schools, by law, are required to adhere to Generally Accepted Accounting Principles (GAAP). Failure to scrupulously manage a school's financials can result in audit findings, fines, or, in extreme cases, school closure. DC PCSB must revoke the charter of a school that is insolvent, engages in a pattern of fiscal mismanagement, or does not comply with GAAP.

Once fully approved, schools are held accountable to DC PCSB's financial oversight (see, e.g., DC Code § 38-1802.11). You should visit the [Financial Oversight](#)⁹¹ page of the DC PCSB website for more information on the Financial Analysis Report (FAR), the approved auditor's list and audit guidelines, and the UPSFF. First year schools also must submit monthly interim financial statements per the [LEA Document Submission Calendar](#).⁹² You should also visit OSSE's [Grants and Funding](#)⁹³ page to learn more about their resources. DC PCSB and OSSE will present on school finance in greater detail during the new school workshops in the spring of the planning year.

Recommendations

- (All schools) During the planning year, new schools may wish to engage a firm from the [approved auditors list](#)⁹⁴ to help put systems in place to ensure appropriate financial compliance beginning in year one.

⁸⁸ <https://www.camelbackventures.org/>

⁸⁹ <http://edforwarddc.org/>

⁹⁰ <https://citybridge.org/>

⁹¹ <https://www.dcpccb.org/report/finance-and-operations>

⁹² <https://dcpccb.org/annual-compliance-reporting>

⁹³ <https://osse.dc.gov/page/grants-and-funding-0>

⁹⁴ <https://dcpccb.egnyte.com/dl/XHOHE38G5p/?>

- (All schools) Many schools contract with financial service providers to help with budgeting, accounting, grants management, and reporting. While DC PCSB does not endorse any particular organization, LEAs used these financial groups in SY 2018-19.
 - [ACS Business & Accounting Solutions, LLC](#)⁹⁵
 - [BDO/CSA](#)⁹⁶
 - [EdOps](#)⁹⁷
 - [Raffa](#)⁹⁸
 - Education or Charter Management Organizations

5.4.3 Procurement Contracts

What You Need to Know

New schools are subject to procurement requirements for funding from the federal government, such as the CSP grant, and from the District. New schools should be aware of the similarities and differences in these requirements as they pertain to their planning years and when they are fully operational. OSSE's [Grants and Funding](#)⁹⁹ page contains resources about federal grant management. You can also contact Stacy Kirk at stacy.kirk@dc.gov with questions about the CSP grant requirements.

A procurement contract that is subject to DC PCSB oversight has an aggregate value equal to or exceeding \$25,000 over the course of any fiscal year and obligates the seller to provide services, supplies, or both to a public charter school. As explained in DC PCSB's [Procurement Contract Submission and Conflict of Interest Policy](#),¹⁰⁰ all procurement contracts over \$25,000 (with the exception of certain contracts named in the policy) must be bid publicly, with schools publishing a notice for proposals in the DC Register and two newspapers of general circulation at least seven business days prior to awarding the contract. Documentation supporting that each contract was properly bid must be submitted to DC PCSB no later than three business days after a school awards the contract and at least 10 business days prior to the effective date of the contract. Within 30 calendar days of the execution date of the contract, the school must submit the final contract.

This policy is only applicable to public charter schools that receive local funding; if you enter into a contract during your planning year and no portion of the contract is

⁹⁵ <http://acscpa.net/>

⁹⁶ <https://www.bdo.com/>

⁹⁷ <http://www.ed-ops.com/>

⁹⁸ <https://www.raffa.com/professionalservices/accounting/default.html>

⁹⁹ <https://osse.dc.gov/page/grants-and-funding-0>

¹⁰⁰ <https://www.dcpccb.org/policy/procurement-contract-submission-policy-0>

paid for, or will be paid for, by local funds, then the policy is not applicable to that contract. Therefore, if a new school intends to use UPSFF dollars to eventually pay for a contract, it is subject to bidding requirements. For example, if a new school plans to enter into a \$50,000 food services contract during the planning year, and it will pay for some of that contract with local funds it will receive once it opens, then it must adhere to the bidding and submission requirements of the policy regardless of whether or not the school is fully approved. However, once a school is in full operation, all procurement contracts equal to or exceeding \$25,000¹⁰¹ will be subject to the policy and must be reported to DC PCSB regardless of the type of funds used. Information on procurement contracts can be found on the [Public Charter School Contracts](#)¹⁰² page of DC PCSB's website, and the topic will be covered in greater detail during the new schools' workshops.

Recommendations

- (All schools) While DC PCSB does not endorse any particular vendor, it does publish information on the submitted procurement contracts it reviews each month on its [Public Charter School Contracts](#) page. New schools should check out these lists to learn about the vendors LEAs use.
- (All schools) While DC PCSB does not endorse any particular organization, many schools have joined a local purchasing cooperative, the [Community Purchasing Alliance \(CPA\)](#).¹⁰³ Past school leaders recommend that you join CPA's meetings for information on cost-effective contracts. Contact Amy Abbott at amy@cpa.coop for information.



5.5 Data Systems and Management

5.5.1 Student Information System

What You Need to Know

Student information systems (SIS) are electronic platforms that manage student data, such as demographics, enrollment, contact information, attendance, academic performance, and discipline. Data managers should ensure that these data streams

¹⁰¹ Additional requirements under the policy apply to conflicting interest contracts, even where those contracts are less than \$25,000. Please consult the policy for complete information.

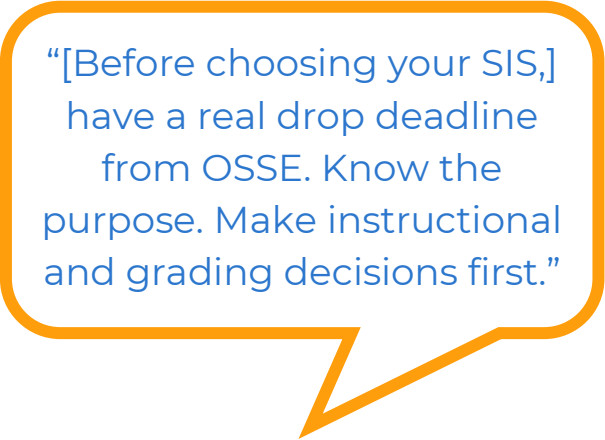
¹⁰² <https://dcpcsb.org/public-charter-school-contracts>

¹⁰³ www.cpa.coop

can “talk” with one another, that they flow into DC PCSB’s and OSSE’s systems, and that there are systems in place to track their efficacy on a daily basis. In early winter of the planning year, you will select an SIS and notify DC PCSB and OSSE of your choice.

Recommendations

- (Middle schools, adult schools) Two of three recent new schools selected eSchoolPLUS as their SIS. OSSE strongly recommends that LEAs use it because it is free to LEAs and is already linked to all of OSSE’s data systems. Moreover, OSSE provides free eSchoolPLUS technical assistance.
- (All schools) When selecting an SIS, one new school leader advises, “1) It is important to have a real drop deadline from OSSE before doing so. Pick too early and you won’t have all the decision-making factors decided. Pick too late and you won’t receive your data feed in time. 2) Know the purpose. Is this just a warehouse for your data? Go with the cheapest option and do an additional platform that is parent facing. Is this the main behavior and interactive portal? Go for a robust SIS. 3) Make instructional and grading decisions first. We picked an SIS without knowing in depth how grading looked, and it became tougher to change everything implemented already.”
- (All schools) While DC PCSB does not endorse any particular SIS, the following list shows the different SIS used by LEAs in SY 2020-21.
 - [Aspen](#)¹⁰⁴
 - [Claris Filemaker Pro 13](#)¹⁰⁵
 - [eSchoolPLUS](#)¹⁰⁶
 - [Infinite Campus](#)¹⁰⁷
 - [Microsoft SQL Server](#)¹⁰⁸
 - [PowerSchool](#)¹⁰⁹
 - [QuickBase](#)¹¹⁰
 - [Rediker](#)¹¹¹
 - [Salesforce](#)¹¹²
 - [Webfaction](#)¹¹³



“[Before choosing your SIS,] have a real drop deadline from OSSE. Know the purpose. Make instructional and grading decisions first.”

¹⁰⁴ <https://www.follettlearning.com/education-technology/student-information-system>

¹⁰⁵ <https://www.claris.com/filemaker/>

¹⁰⁶ <https://www.powerschool.com/solutions/student-information-system/eschoolplus-sis/>

¹⁰⁷ <https://www.infinitecampus.com/>

¹⁰⁸ <https://www.microsoft.com/en-us/sql-server/sql-server-2019>

¹⁰⁹ <https://www.powerschool.com/>

¹¹⁰ <https://www.quickbase.com/>

¹¹¹ <https://www.rediker.com/>

¹¹² <https://www.salesforce.org/>

¹¹³ <https://www.webfaction.com/>

5.5.2 DC PCSB Data Systems

What You Need to Know

DC PCSB has two main data systems: Epicenter and the Hub.

Epicenter is a web application used to collect and store school documents related to compliance, governance, operations, finances, and academic goals and performance. LEAs submit documents, and DC PCSB accepts the documents (or sends them back for revision) based on completion, compliance, and accuracy of content.

The Hub, a Quick Base application, is DC PCSB's primary LEA-facing data collection and reporting platform. The Hub stores information pertaining to academics, points of contact, enrollment projections, discipline data, entity management, and procurement contracts and financials. Also, the Hub allows schools to validate reporting requirements, and it features a ticketing interface for schools to get support.

In the summer of the planning year, a new school will gain access to Epicenter and the Hub. Once you have identified which staff members should have log-in accounts, DC PCSB will add them to our data systems. Then, you will designate a Hub LEA Administrator, who is able to add, change, and remove user access, and fill out an Entity Management Identification (EMI) form provided by DC PCSB. On the form, a school provides information on its facility, school calendar, and grades served, among other things. After a school submits its EMI form, it will receive its unique LEA, campus, and facility codes within DC PCSB's and OSSE's data systems.

During the planning year, your main task in the Hub will be to input contact information for board members, points of contact, and subscription lists into the directory. Per DC PCSB's [School Transparency Policy](#) and [Data and Document Submission Policy](#), schools are expected to keep information in the Hub's contact directory up to date throughout the year, including all key staff and board members.

More broadly, new school leaders should familiarize themselves with our systems before opening to ensure full data compliance in year one. Please consult the [Annual Compliance Reporting](#)¹¹⁴ page on the DC PCSB website as well as these Hub [training videos](#)¹¹⁵ and [instructions](#)¹¹⁶ to learn more.

¹¹⁴ <https://dcpcsb.org/annual-compliance-reporting>.

¹¹⁵ <https://dcpcsb.quickbase.com/db/bm2cvkjw3?a=q&qid=10>

¹¹⁶ <https://dcpcsb.gitlab.io/public-docs/>

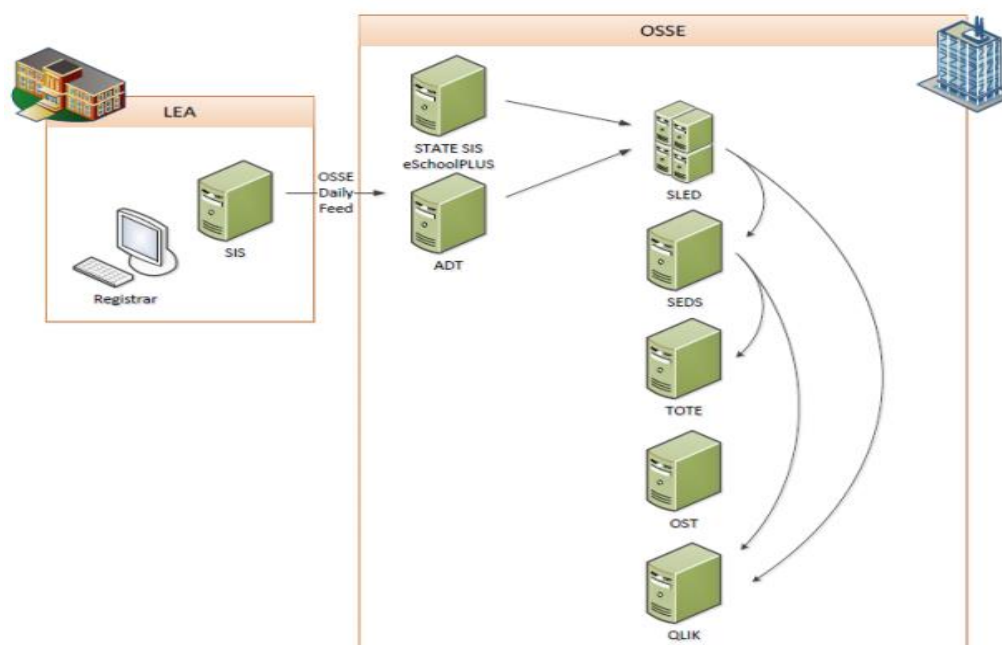
Recommendations

- (All schools) DC PCSB recommends that heads of schools not serve as Epicenter's primary point of contact or as the Hub's LEA administrator. These positions are best filled by the director of operations or the data manager.
- (All schools) DC PCSB recommends that new school data managers check out the how-to videos and "quick links" document to gain familiarity with the Hub's tools.

5.5.3 OSSE Data Systems

What You Need to Know

OSSE has five primary data systems: eSchoolPLUS, SLED, SEDS, TOTE, and Qlik. As a primer, this visual shows how data flows from an LEA to OSSE's data systems.



eSchoolPLUS manages school calendars and points of contact; it can also serve as an LEA's SIS. The Enrollment Audit and Child Count Application is where schools certify the annual audit roster to determine funding for the year. This application can be accessed via SLED.

In **SLED**, schools can review student demographic and enrollment data. Data from SLED flows into **SEDS**, which holds special education data; **TOTE**, the special education student transportation database; and other downstream systems. **Qlik** holds information pertaining to attendance measures, campuses addresses, data

validation, the [School Transparency and Reporting \(STAR\) framework](#),¹¹⁷ and other fields.

To learn more about OSSE's data systems, see the [2020-21 Start of School Checklist for LEA Data Managers](#)¹¹⁸ and the [SY 2020-21 New LEA Data Manager Orientation](#).¹¹⁹ OSSE will be releasing similar guidance and training for SY 2021-22 in the coming weeks. This topic will also be covered during OSSE's new LEA orientation series in the spring of the planning year.

Recommendations

- (All schools) Schools should ensure that at least one team member has access to all OSSE data systems by spring of the planning year.
- (All schools) Schools should identify their points of contact in eSchoolPLUS before the start of the school year.
- (All schools) OSSE hosts [monthly meetings](#)¹²⁰ for all data managers and offers multiple [data systems trainings](#)¹²¹ throughout the year. New schools are welcome to take advantage of these opportunities, especially once they identify a data manager.

5.5.4 Third-Party Data Systems

What You Need to Know

During the planning year, all high schools should request a school identifier (known as a College Entrance Examination Board – or CEEB code) from the College Board so that student outcomes on assessments such as the SAT and Advanced Placement tests can be connected with the school.

Recommendations

- (High schools) You can contact the College Board at codecontrol@ets.org or by phone at (609) 771-7091 to obtain a High School Code Request form. Schools have reported this process takes about one month from submitting the form to receiving the assigned school code. Schools should share assigned school codes with DC PCSB to help facilitate the reporting process for high school accountability measures.

¹¹⁷ <https://osse.dc.gov/publication/dc-school-report-card-and-star-framework-technical-guide>

¹¹⁸ <https://osse.dc.gov/publication/2020-21-start-school-checklist-lea-data-managers>

¹¹⁹ <https://osse.dc.gov/publication/new-lea-data-managers-training>

¹²⁰ <https://osse.dc.gov/node/1198985>

¹²¹ <https://octo.quickbase.com/db/bj339wdcr>

5.6 Public Health Emergency Planning

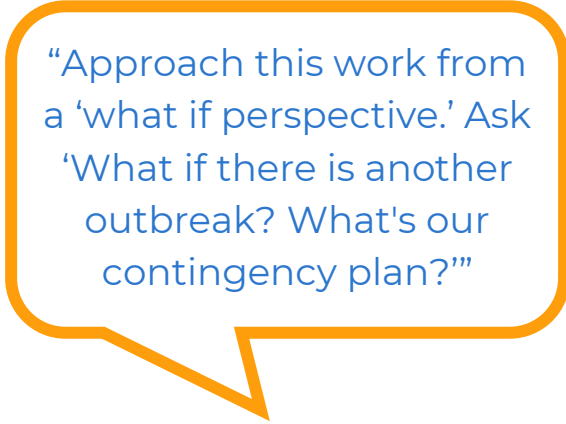
What You Need to Know

On March 11, 2020, Mayor Muriel Bowser declared a public health emergency in response to the growing number of cases of COVID-19 in the DC metropolitan region. All public charter and DCPS schools closed soon after and transitioned to distance learning for the rest of SY 2019-20. While most campuses began SY 2020-21 offering only virtual instruction, many returned to at least some in-person learning as the year progressed. Presently, the District is preparing for all students¹²² to return to five days of in-person learning for SY 2021-22.

To ensure schools are sufficiently prepared for reopening and recovery, OSSE is requiring that LEAs submit Continuous Education Plans by June 30, 2021. OSSE has published [COVID-19-related guidance and resources](#),¹²³ including guiding principles for continuous education, to support these efforts.¹²⁴ As the landscape continues to evolve, new school leaders should stay updated on the city's COVID-19 response plans via the website <http://coronavirus.dc.gov/> and by attending sector-wide calls hosted by the Office of the Deputy Mayor for Education (DME). You can get these calendar invites by contacting the DME's Rebecca Lee at rebecca.lee@dc.gov.

In addition, DC PCSB has created a [Coronavirus: What You Should Know](#)¹²⁵ page on its website to share updates and resources. For more general resources, visit the [School Health and Wellness](#)¹²⁶ page and the [Health and Wellness](#)¹²⁷ page on DC

PCSB's and OSSE's websites, respectively, and DC PCSB's [School Safety and Security Resources](#)¹²⁸ page.



“Approach this work from a ‘what if perspective.’ Ask ‘What if there is another outbreak? What's our contingency plan?’”

Recommendations

- (All schools) New school leaders should engage with current school leaders and public health experts to learn how to best shift their operations, instruction, and family engagement practices to a virtual environment.

¹²² LEAs must still plan to offer distance learning under limited circumstances, including to students with medical certifications; to accommodate staff or students needing to quarantine; and in response to changes in public health conditions.

¹²³ <https://osse.dc.gov/page/covid-19-related-osse-guidance-documents>

¹²⁴ <https://osse.dc.gov/distancelearning>

¹²⁵ <https://dcpcsb.org/coronavirus-what-you-should-know>

¹²⁶ <https://dcpcsb.org/school-health-wellness-resources>

¹²⁷ <https://osse.dc.gov/service/health-and-wellness-0>

¹²⁸ <https://dcpcsb.org/school-safety-and-security-resources>

- (All schools) One school leader shared, “We originally had one comprehensive project plan to guide us from planning to launch. We now have multiple project plans based on different scenarios to ensure that we are adequately planning for the different ways in which school might operate. My recommendation is that new schools should approach this work from a ‘what if perspective.’ Ask ‘What if there is another outbreak? What's our contingency plan?’”
- (Co-located schools) New schools that plan to co-locate with a school, church, or community organization should align their public health emergency plans with their partners.

6. Special Populations

Inclusiveness is one of the five standards for approval by which all charter applications are evaluated. Every element of the school program must be deliberately designed to be inclusive of all students, including students with disabilities (SWD), English learners (ELs), at-risk students,¹²⁹ and any other student who may be admitted through the lottery. This section of the Planning Year Playbook provides guidance on how schools can best prepare to uphold their responsibilities to serve all students.

6.1 Special Education

What You Need to Know

In SY 2020-21, 6,459 DC public charter school students (14.7% of the total population) received special education services. Because almost every student with a disability will spend some part of the day in the general education setting, all teachers must be prepared to create inclusive classrooms and environments where all students will be respected and challenged. Although this section mainly focuses on how schools can establish compliant special education policies and procedures, cultivating a program that provides high quality specialized instruction and related services is equally as important to establish in the planning year. Both DC PCSB and OSSE are committed to providing support in this area – such as training on the [high-leverage practices in special education](#),¹³⁰ a set of 22 research-based practices all educators of SWD should be able to master, or a professional learning community for special education coordinators. To learn more about these opportunities, please contact Hannah.

Public charter schools are required to comply with all federal and local special education laws, including IDEA,¹³¹ Section 504 of the Rehabilitation Act of 1973,¹³² and



Once OSSE releases its Early Access Qlik apps in the spring, you can better plan for special education and EL services, staffing, and caseloads.

¹²⁹ At-risk students are defined as those that receive Temporary Assistance for Needy Families (TANF) or Supplemental Nutrition Assistance Program (SNAP) benefits, are homeless or in the foster system, or are more than a year or more behind in high school.

¹³⁰ <https://highleveragepractices.org/>

¹³¹ 20 U.S.C. §§ 1400 et seq. See 20 U.S.C. § 1413(a)(5)

¹³² 29 U.S.C. § 794

the Americans with Disabilities Act.¹³³ Adult schools may annually choose to accept IDEA Part B funding and provide services to SWD aged 22 or younger.¹³⁴

Throughout the charter application, all new PK-12 schools and those adult schools that elect to accept IDEA Part B funding present their special education plans to ensure that all SWD across a full continuum of services receive an excellent education complete with appropriate resources, related services, curriculum, and staffing.

During the planning year, you become responsible for implementing this plan. Some key special education tasks are unique to a school. For example, as discussed in [2.1 Conditions](#), some new schools may need to clarify their plan to serve SWD. There are other special education tasks that all new schools share related to staffing and training. Every new school must identify its special education coordinator during the planning year (see [5.3.1 Key Personnel Identification](#)); hire appropriate special education staffing, as described in the charter application's staffing plan; have appropriate locations to provide services to students, as described in the pre-opening site visit checklist; and train all teachers on how to address the needs of SWD. Moreover, schools must train front desk staff in open enrollment requirements, especially as they pertain to SWD (see [5.2.2 Student Applications](#)).

Additionally, founding teams must familiarize themselves with DC's special education data systems, laws, policies, and monitoring. [Chapter 30](#)¹³⁵ of the DC Municipal Regulations (DCMR) pertains to local special education law. Both OSSE and DC PCSB share responsibilities (as the State Education Agency and charter authorizer, respectively) for monitoring every LEA's compliance with federal and local special education laws. OSSE explains these topics in greater detail on the



“Intentionally plan for supports and services throughout the school day; ensure the schedule is developed.”

[Special Education for Students with Disabilities](#)¹³⁶ page of its website, and it compiled a [Start of School Checklist for LEA Special Education Points of Contact](#),¹³⁷ which details the actions an LEA should complete in preparation for serving incoming SWD. DC PCSB provides special education oversight and resources on the [Special Populations](#)¹³⁸ page of our website, and we cover this topic in greater detail during the spring of the planning year.

¹³³ 42 U.S.C. § 12101

¹³⁴ In DC, Part B funding applies to students aged 3-22.

¹³⁵ <https://www.dcregs.dc.gov/Common/DCMR/RuleList.aspx?ChapterNum=5-E30>

¹³⁶ <https://osse.dc.gov/page/special-education-students-disabilities>

¹³⁷ <https://osse.dc.gov/publication/2019-20-start-school-checklist-lea-special-education-points-contact>

¹³⁸ <https://www.dcpccb.org/report/special-education>

Recommendations

- (All schools) In the spring of the planning year, new schools will gain access to the Early Access to SWD and High School Transition Qlik applications, which provide a preview of student-level data for pre-enrolled SWD. Schools should use these applications to plan effective and responsive programming.
- (All schools) New school leaders should take advantage of [OSSE's trainings](#)¹³⁹ on special education compliance and instruction. Jennifer Carpenter is OSSE's Special Education Training and Technical Specialist and can be reached at jennifer.carpenter@dc.gov.
- (All schools) Two school leaders advised hiring your Student Support Coordinator early on in the planning year. One leader elaborated, "I would spend less time rushing to meet arbitrary deadlines and spend more time thinking through important aspects of our model like serving special populations."
- (All schools) While DC PCSB does not endorse any specific organization, [DC Special Education Cooperative](#)¹⁴⁰ is a membership-based charter support organization committed to improving outcomes for SWD. It offers provisional memberships for new schools in their planning year.
- (All schools) New schools should learn more about local special education legal and advocacy groups such as [Advocates for Justice and Education, Inc.](#)¹⁴¹ and the [Children's Law Center](#).¹⁴² These groups provide training and resources for families and professionals.
- (All schools) One new school leader shared, "When developing a strong special education program, it is important to intentionally plan for supports and services throughout the school day; ensure the schedule is developed for scholars. Then, invest in strong systems and curriculum to provide academic intervention for all students."

6.2 English Learners

What You Need to Know

3,413 English learner students (7.8% of the total population) attend DC public charter schools, and this number is increasing over time. All schools – regardless of

¹³⁹ <https://octo.quickbase.com/db/bj339wdcr>

¹⁴⁰ <https://specialedcoop.org/>

¹⁴¹ <http://www.aje-dc.org/>

¹⁴² <https://www.childrenslawcenter.org/>

enrollment projections or location – have an obligation to ensure that EL students develop English language proficiency and meet the same challenging state academic standards as their native English-speaking peers. In pursuit of this goal, all new school staff are responsible for supporting EL students.

Similar to special education, new schools explain their plan to serve ELs in their charter applications, and they begin to implement these plans during the planning year. A common school-specific condition is refining elements of the EL plan (e.g., EL model, language access practices). Also, during the planning year, you will hire appropriate staff and gather resources to implement your language acquisition program. Teachers should be trained on the school's EL model and techniques to promote language acquisition skills. Family-facing staff should be trained on [language access requirements](#),¹⁴³ like how to provide translation and interpretation services, and open enrollment regulations for ELs (see [5.2.2 Student Applications](#)).

OSSE and DC PCSB support the creation and maintenance of high-quality language acquisition programs by providing guidance, monitoring, technical assistance, and training. Many resources can be found on the [English Learner Policy and Programs](#)¹⁴⁴ page of OSSE's website. In particular, new schools should review OSSE's 2021 [Delivering Education Services to English Learners](#)¹⁴⁵ and the [Start of School Checklist for LEA English Learner Points of Contact](#).¹⁴⁶ Please note that adult schools that do not offer a high school diploma have different responsibilities for serving their ELs aged 21 or under, as detailed on pages 11-12 of "Delivering Education Services to English Learners." DC PCSB will present on its EL oversight and support work, including our professional learning community for EL coordinators, at the new school workshops. For more information, please contact Hannah.

Recommendations

- (All schools) In the spring of the planning year, new schools will gain access to the Early Access to ELs Qlik application, which provides a preview of student-level data for pre-enrolled ELs. Schools should use this application to plan effective and responsive programming.
- (All schools) New school leaders should take advantage of OSSE's [trainings](#)¹⁴⁷ on EL programming. Jennifer Norton, OSSE's Program Manager for EL Support, can be reached at jennifer.norton@dc.gov.

¹⁴³ <https://ohr.dc.gov/page/LAportal/toolkit>

¹⁴⁴ <https://osse.dc.gov/page/english-learner-policy-and-programs>

¹⁴⁵ <https://osse.dc.gov/publication/delivering-education-services-english-learners-policies-and-procedures-administrators>

¹⁴⁶ <https://osse.dc.gov/startofschool>

¹⁴⁷ <https://octo.quickbase.com/db/bj339wdcr>

- (All schools) To engage with immigrant and English learner families, one school translated all of its one-pagers into six languages, and its newsletter and website were available in Spanish.¹⁴⁸ While DC PCSB does not endorse any particular organization, this school used [Day Translations](#).¹⁴⁹ [LanguageLine](#)¹⁵⁰ is another vendor used by many charters and DCPS.

6.3 At-Risk Preference Policy

What You Need to Know

DC PCSB approved the [At-Risk Approval and Monitoring Policy](#)¹⁵¹ on May 17, 2021. The purpose of this policy is to implement the [Expanding Equitable Access to Schools Amendment Act of 2020](#),¹⁵² granting at-risk students¹⁵³ and their families greater access to the schools that they want to attend, and ensuring that those schools that choose to offer the preference are prepared to serve higher numbers of at-risk students. Beginning in SY 2022-23, public charter schools may offer an admission preference to students who are at risk, with prior approval from DC PCSB. The preference will remain in effect for five years and may be renewed an unlimited number of times, each time for an additional five-year period.

Schools that wish to implement this preference must submit [an application](#) between May 20 and July 25 of each year. The application consists of five prompts that ask how the school has served students who are deemed at-risk in the past and how the school will adapt its programming moving forward. In addition to answering the five prompts, interested schools must also submit a letter from the chair of the school's board of trustees confirming that the school's board has approved the preference request. If approved, this preference will be incorporated through the MSDC lottery.

Schools will be notified no later than August 15 of each year regarding their approval status. If you have any questions about the At-Risk Approval and Monitoring Policy or your school's application, please reach out to Abby Getzel, specialist in the School Performance Department, at agetzel@dcpcsb.org.

Recommendations

- (All schools) Schools that would like to apply for the at-risk preference should collect data on at-risk student achievement rates, set up strong systems for

¹⁴⁸ In addition to translations you may choose to provide, please be mindful of your obligations under the law to provide limited-English proficient and non-English proficient adults with access to important information about the education program.

¹⁴⁹ <https://www.daytranslations.com/>

¹⁵⁰ <https://www.languageonline.com/>

¹⁵¹ <https://dcpcsb.org/risk-preference-approval-and-monitoring-policy>

¹⁵² <https://code.dccouncil.us/dc/council/laws/23-237.html>

¹⁵³ "At-risk" means that a student is homeless, under the care of the District's foster care system, qualifies for Temporary Assistance for Needy Families (TANF) or the Supplemental Nutrition Assistance Program (SNAP), or that the high school student is overage. See DC Code § 38-2901(2A).

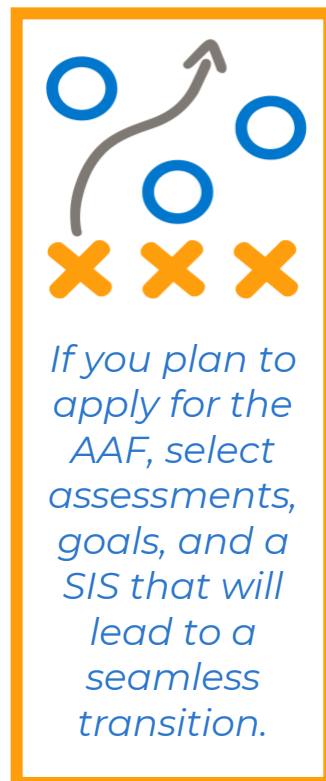
engaging their school community on the topic, and think critically about supports needed for students who are at-risk within their academic program.

6.4 Alternative Designation

What You Need to Know

Some public charter schools purposefully target students with greater risk factors

than those who attend typical public or public charter schools. DC PCSB developed the Alternative Accountability Framework (AAF) for these schools in order to measure their unique school programs more appropriately. Although schools cannot apply for AAF eligibility until year one, founding teams should be aware of the qualifying criteria, which require that 60% or more of the school's population has one or more of a list of enumerated risk factors, which can be found in the SY 2018-19 [PMF Technical Guide](#).¹⁵⁴



After a school opens, schools that meet the above criteria will generally be approved by DC PCSB to use the AAF. They will also be designated as an alternative school by OSSE for its accountability purposes. Next, the school and DC PCSB staff design a set of measures aligned to specific categories of quality – either traditional and/or nontraditional and unique to the school's program. These measures are subject to DC PCSB approval, annually measured, and publicly reported. To learn more, consult the [AAF](#)¹⁵⁵ on DC PCSB's website or contact Quinhon N. Scott, specialist in the School Performance Department, at gscott@dcpcsb.org.

Recommendations

- (All schools) New schools that plan to apply for AAF accountability should purposefully select assessments, SIS, and goals to allow for a seamless transition to the AAF.

¹⁵⁴ <https://www.dcpccb.org/performance-management-framework-pmf>

¹⁵⁵ <https://www.dcpccb.org/alternative-accountability-framework>

7. Appendix

Although there are many links to external websites throughout the Planning Year Playbook, the [appendix](#)¹⁵⁶ compiles all of the referenced materials that live in DC PCSB's internal systems. New schools should review these prior to the start of year one. A list of the materials and resources are as follows:

- Board of Trustees Trainings
 - Board of Trustees Meeting Minutes Criteria for Review 2019-20
 - Presentation on Community Complaints for Boards
 - Presentation on Building Strong Boards
 - Self-Assessment of Parent Voice on School Boards
- Condition Examples
 - LEA-Specific Conditions
 - Standard Conditions
- Facilities and Community Outreach
 - Community Outreach Tracker Template
 - Pre-Opening Site Visit Checklist
- New School Workshop Agenda SY 2020-21
 - DC PCSB Trainings
 - OSSE Trainings
- Planning Year Checklists
 - DPA Start-up Checklist 2017-18
 - North Star 650 Start-up Guide 2017-18
 - WLA School Start-up Project Plan 2016-17

¹⁵⁶ <https://dcpcsb.egnyte.com/fl/yXYbiiwDwR>