BAIN & COMPANY

School Start-up Plan
Overview and Instructions

Overview of Start-up Plan

- **Start-up Plan.** This tab contains the ~375 tasks required to open the school. Key columns include:
  - Numbering – all rows are numbered by section. The first number refers to the design area (e.g. Mission = 1, Culture = 2, etc.) and the second is the activity number within that category. E.g. "2.6, "Develop student Creed," is the 6th activity within the culture design area.
  - Design area, category, and sub-category provide groupings and sub-groups of required activities
  - Dates – we've entered the proposed due date and an estimate of how long we think each activity will take. Combined, these two inputs calculate the start date.
  - Status
    ‣ Not Active – no work is currently needed on the task
    ‣ Active, On Track – task requires current work but is on track
    ‣ Concern – shows a task is nearing completion. Status will turn yellow if it is due within 3 days. This is intended as a reminder, not an indication of whether the activity will be completed on time.
    ‣ Off Track – task is late and overdue
    ‣ Completed – task has been completed, by entering the date completed
  - Interdependent / Impact – these tasks are closely linked together and are dependent on each other
  - Hand-off materials – the team compiled information in the hand-off document that will be useful for this step
  - Notes – additional information

- **Overall Progress.** Use this tab to get a high level summary of progress to date, by Design Area

- **Monthly Check List.** Use this tab to pull current month activities. This includes activities that are presently open, as well as those beginning in the selected month

- **Check List by Owner.** Use this tab to pull the monthly report by owner. (e.g. All of Ron's tasks in August 2008)

- **Red Report.** Use this tab to see what activities are late or behind schedule.

Refer to Tab 1, "Instructions" or the appendix for detailed instructions on how to use and update the tool

Start-up plan tab contains the master list of activities

"Today" automatically updates

Grammar School Start-up Planning Tool

Complete for all tasks
Cell auto-fills

Today: 2/27/2009

Shaded cells auto-fill; don't input data here

"Status" changes color to reflect progress

Dates: Change the start date by changing the due date or duration

This activity should be done in conjunction with the Family Orientation. (The Interdependent column is a note only – the two activities are not connected on the spreadsheet)

		CATEGORIZATION			TASK & OWNER		DATE & STATUS					INTERDEPENDENCIES & NOTES		
#	##	Design A...	Category	Sub-Category	Task/Activity	Owner	Start Date	Date Due	Duration (workdays)	Date completed	Status	Interdependent / Impact	Hand-off materials	Notes
1	1	Mission	...l design	Communications plan	Create short "school message"	Ron	6/2/2008	6/11/2008	7	6/15/08	Completed			Need to be ready for Community Forum; can refine over time
1	2	Missi...			...lize school values, mission	Ana	8/11/2008	9/1/2008	15		Off Track			
1	3	Missi...			...revisit high performing schools	Ana	9/15/2008	12/15/2008	65	7/1/08	Completed		Yes	
2	1	Cultu...			...te long-list of artifacts in the school	Ana	10/6/2008	12/1/2008	40		Off Track		Yes	Review school visit notes for ideas
2	2	Cultu...			...elop plan to create artifacts	Ana	12/19/2008	2/27/2009	50		Concern			
2	3	Culture	Artifacts	Uniforms	Design and agree on school uniforms	Ana	2/16/2009	3/23/2009	25		Active, On Track			
2	4	Culture	Artifacts	Uniforms	Identify school uniform vendor	School Operations Manager	3/23/2009	4/27/2009	25		Not Active			
2	5	Culture	Artifacts	Uniforms	Develop process for students to get uniforms	School Ope...	...2009	6/1/2009	25		Not Active	9.17 Fam... orientation		
2	6	Culture	Artifacts	Creed			9/10/2008	10/1/2008	15		Off Track	6.2 Student recruitment materials		
2	7	Culture	Artifacts	Creed			7/1/2009	7/8/2009	5		Not Active	1.2 Finalize mission		
2	8	Culture	Behaviors	Behaviors			10/13/2008	12/15/2008	45		Off Track	4.36 Teacher Summer Training		Some will be detailed here, but, if more come up they should be added. Need to clearly articulate to parents.
2	9	Culture	Behaviors	Behaviors	Develop transition routines, other behaviors	Ana	12/29/2008	3/2/2009	45		Active, On Track	4.36 Teacher Summer Training		
2	10	Culture	Activities	Activities	Develop potential list of assemblies (e.g. college panel)	Ana	1/19/2009	3/2/2009	30		Active, On Track	9.17 Family orientation		
2	11	Culture	Activities	Activities	Develop potential list of field-trip locations	Ana	1/19/2009	3/2/2009	30		Active, On Track	9.17 Family orientation		
2	12	Culture	Activities	Activities	Outline objectives for each grade level's trip to House in the Woods	Ana	1/19/2009	3/2/2009	30		Active, On Track	9.17 Family orientation		
2	13	Culture	Activities	Activities	Draft schedule for House in the Wood trips; confirm camp availability	Ana	2/16/2009	3/2/2009	10		Active, On Track	2.40 Calendar		
2	14	Culture	Activities	Activities	Identify appropriate timing and schedule student orientation(s)	Ana	2/23/2009	3/2/2009	5		Active, On Track	6.18 Lottery		Earlier for culture and data collection; Just before school to meet teachers, etc.
2	15	Culture	Activities	Activities	Finalize list of assemblies	Ana	4/20/2009	6/1/2009	30		Not Active	9.17 Family orientation		
2	16	Culture	Activities	Activities	Finalize list of field trips	Ana	4/20/2009	6/1/2009	30		Not Active	9.17 Family orientation		
2	17	Culture	Activities	Activities	Outline agenda, attendance, and activities for House in the Woods Teachers revise later						...t Active	9.17 Family orientation		With teachers
2	18	Culture	Activities	Activities	Prepare materials for student orientation						...Active			
2	19	Culture	Activities	Activities	Student orientation(s)						...t Active			Behaviors, intro to culture, hand out handbook. Summer or 1st day of school?

Overall progress dashboard provides summary view of status

Grammar School Start-up Planning Tool - Overall Progress Dashboard

6/30/2008

	Design Area	Total Activites	Total Completed Activites	Total % Complete	Progress to Date (% Complete According to Schedule)	Active Tasks	# of Concern Activities	# of Off Track Activities	Overall Status
					Summary of Overall Progress				
1	Mission	3	1	33%	33%	0	0	2	Concern
2	Culture	43	10	23%	91%	2	0	1	Concern
3	Leadership	6	0	0%	0%	0	0	6	Off Track
4	Teachers	48	7	15%	50%	4	0	7	Off Track
5	Instruction and Programming	28	7	25%	78%	6	0	2	Concern
6	Student recruitment	26	5	19%	36%	2	0	9	Off Track
7	Specialized Instruction	30	3	10%	33%	5	0	6	Off Track
8	After-school programming	12	0	0%	0%	1	0	4	Off Track
9	Parents/ community	17	7	41%	100%	1	0	0	On Track
10	Facility	28	7	25%	54%	11	0	6	Off Track
11	Schoolwide Data and Assessment	31	3	10%	75%	2	0	1	Concern
12	Operation Finance & Administration	103	9	9%	22%	28	0	3	Off Track

Shows status by major design areas

Completion metrics provide insight into overall progress

Colors change to reflect the number of activities late or concerned. Note: The "Overall Status" line is the sum of "Concern" and "Off Track" activities, so it is possible for the overall status to indicate "Concern" with no items in the "# of Concerned Activities" line. Specifics are listed on the instructions tab.

This information was prepared by Bain & Company.

Monthly check list pulls open activities and those starting the current month

Instructions
1) To update the list, click on the table below to activate the PivotTable toolbar
2) Click on the "!" icon, which will refresh the data
3) On the "REPORT MONTH" drop-down, select the current month

Select the report month here

REPORT MONTH	November 2008

Count of Status

#	##	Design Area	Task/Activity	Owner	Start Date	Date Due	Status
1	2	Mission	Finalize school values, mission	Ana	8/11/2008	9/1/2008	Off Track
2	6	Culture	Develop student Creed, translate values through	Ana	9/10/2008	10/1/2008	Off Track
	8	Culture	Translate values into potential list of behaviors required	Ana	10/13/2008	12/15/2008	Active, On Track
	32	Culture	Determine list of courses offered, desired instruction minutes	Ana	8/11/2008	3/30/2009	Active, On Track
3	1	Leadership	Define roles, responsibilities, and skills/experiences need of the Grammar School Committe	Ron/Julie	8/6/2008	10/1/2008	Off Track
	2	Leadership	Conduct governance orientation/transition from current committee	Ron/Julie	8/6/2008	10/1/2008	Off Track
	3	Leadership	Draft board policies and procedures	Ron/Julie	8/6/2008	10/1/2008	Off Track
	5	Leadership	Establish and recruit associate board	Ron/Julie	8/6/2008	10/1/2008	Off Track
	6	Leadership	Establish GSC meeting schedule	Ron/Julie	8/6/2008	10/1/2008	Off Track
4	1	Teachers	Create hiring calendar	Ana	8/4/2008	9/1/2008	Off Track
	2	Teachers	Create literature/teacher recruiting marketing materials	Ana	9/22/2008	11/3/2008	Off Track
	3	Teachers	Finalize teacher selection criteria	Ana	9/22/2008	11/3/2008	Off Track
	4	Teachers	Draft teacher job description	Ana	9/22/2008	11/3/2008	Off Track
	5	Teachers	Confirm #, type of teachers to be hired	Ana	9/22/2008	11/3/2008	Off Track
	6	Teachers	Create interview guide	Ana	10/20/2008	12/1/2008	Active, On Track
	7	Teachers	Create mechanism to track candidates	Ana	10/20/2008	12/1/2008	Active, On Track
	8	Teachers	Finalize salary range, benefits package	Ana	10/20/2008	12/1/2008	Active, On Track
	10	Teachers	Monitor progress of teacher hiring campaign	Ana	11/12/2008	4/1/2009	Active, On Track
	14	Teachers	Draft offer letter	Ana	11/21/2008	1/5/2009	Active, On Track
	15	Teachers	Prepare welcome materials to send upon offer acceptance	Ana	11/21/2008	1/5/2009	Active, On Track
	16	Teachers	Close offered candidates	Ana/Ron	10/8/2008	4/1/2009	Active, On Track
5	1	Instruction and Programming	Confirm curriculum selection (CK, OCR, Saxon, FOSS)	Ana	8/11/2008	11/3/2008	Off Track
	2	Instruction and Programming	Determine supplemental curriculum needs	Ana	8/11/2008	11/3/2008	Off Track
	3	Instruction and Programming	Determine supplemental text books	Ana	8/11/2008	11/3/2008	Off Track
	4	Instruction and Programming	Ensure integration of school themes into curriculum (college prep, SEL)	Ana	8/11/2008	11/3/2008	Off Track
	5	Instruction and Programming	Ensure integration of literacy concepts across curriculum	Ana	8/11/2008	11/3/2008	Off Track
	8	Instruction and Programming	Conduct backwards planning to link ILS to curricula; expand scope and sequence to cover	Ana	8/25/2008	6/1/2009	Active, On Track
	10	Instruction and Programming	Create locally-developed curriculum units, as necessary	Ana	8/25/2008	6/1/2009	Active, On Track
	12	Instruction and Programming	Develop strategies to change or adapt curriculum to meet unexpected needs of student bo	Ana	11/25/2008		Not Active
	13	Instruction and Programming	Create to identify and assess below grade-level students upon enrollment and ongoing	Ana	9/15/2008	1/1/2009	Active, On Track
	14	Instruction and Programming	Create to identify and assess accelerated students upon enrollment and ongoing	Ana	9/15/2008	3/1/2009	Active, On Track
6	2	Student recruitment	recruitment materials (e.g. Tailored for families with school age children)	Ana		9/25/2008	Off Track
	4	Student recruitment	marketing materials to community; including NUSH, Erie Neighborhood House,	Ana		11/3/2008	Off Track

Activities are reported here, but data should be changed ONLY on the tab "1. School Start-up Plan". This will enable the reporting and timing functions to work properly.

The report indicates owner, status

This information was prepared by Bain & Company.

"Red Report" lists all late activities
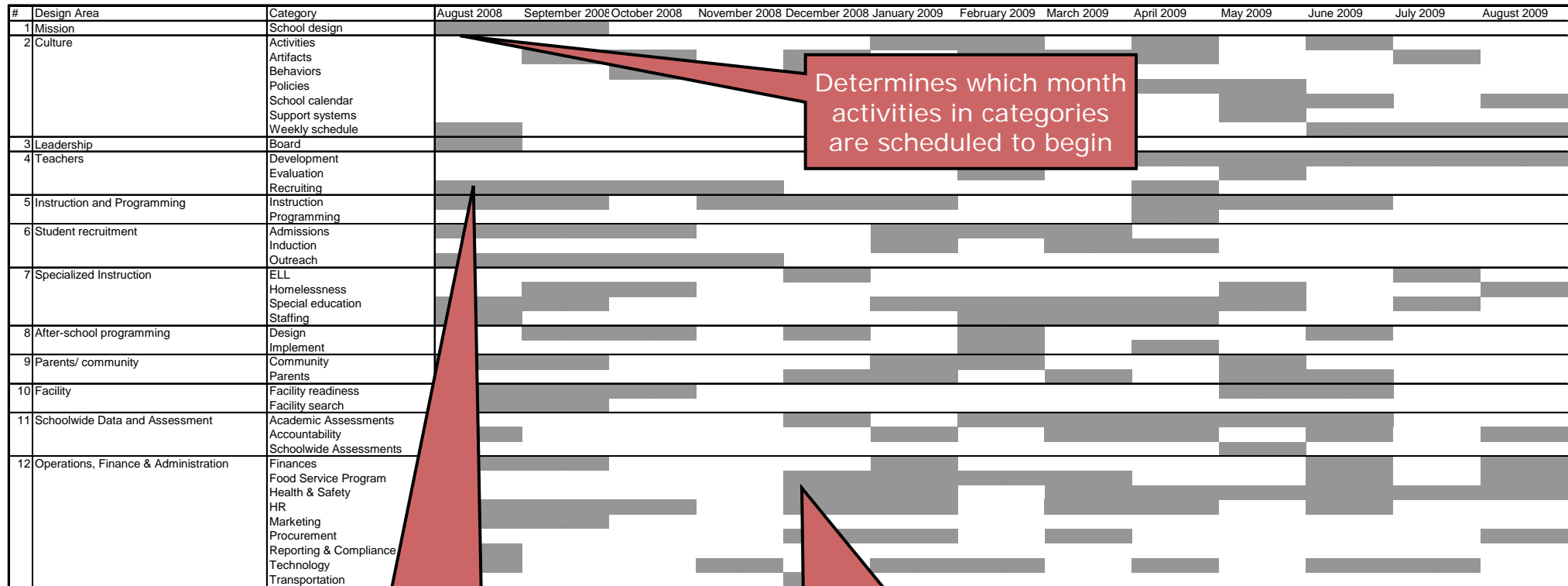
Summary of Behind-Schedule Activities

Instructions
1) To update the list, click on the table below to activate the PivotTable toolbar
2) Click on the "!" icon, which will refresh the data

Status | (Multiple Items)

Count of Task/Activity

#	##	Design Area	Category	Task/Activity	Owner	Date Due	Total
1	2	Mission	School design	Finalize school values, mission	Ana	9/1/2008	1
2	6	Culture	Artifacts	Develop student Creed, translate values through	Ana	10/1/2008	1
3	1	Leadership	Board	Define roles, responsibilities, and skills/experiences need of the Gran	Ron/Julie	10/1/2008	1
	2	Leadership	Board	Conduct governance orientation/transition from current committee	Ron/Julie	10/1/2008	1
	3	Leadership	Board	Draft board policies and procedures	Ron/Julie	10/1/2008	1
	5	Leadership	Board	Establish and recruit associate board	Ron/Julie	10/1/2008	1
	6	Leadership	Board	Establish GSC meeting schedule	Ron/Julie	10/1/2008	1
4	1	Teachers	Recruiting	Create hiring calendar	Ana	9/1/2008	1
6	1	Student recruitment	Outreach	Develop student recruitment plans	(blank)	9/15/2008	1
	2	Student recruitment	Outreach	Draft student recruitment materials (e.g. Tailored for families with sch	Ana	9/25/2008	1
	9	Student recruitment	Admissions	Schedule parent information sessions and incorporate key dates into	Ana	9/15/2008	1
	12	Student recruitment	Admissions	Determine application process (application due date, lottery date)	Ana	9/1/2008	1
	13	Student recruitment	Admissions	Finalize application and enrollment plan; incorporate key dates into re	Ana	10/1/2008	1
	15	Student recruitment	Admissions	Determine enrollment cut-off date	Ana	9/1/2008	1
7	24	Specialized Instruction	Staffing	Review staffing plan regarding roles and responsibilities needed for s	Ana	9/1/2008	1
	25	Specialized Instruction	Staffing	Clarify roles and responsibilities of Dean, Social Worker, and NUSH i	Ron	9/1/2008	1
9	1	Parents/ community	Community	Identify existing community relationships, strengths and gaps	Ana/Ron	9/1/2008	1
	3	Parents/ community	Community	Identify important dates to inform the community of (e.g. school tours	Ana	9/1/2008	1
	4	Parents/ community	Community	Draft community outreach materials (e.g. Tailored for community lead	Ana/Ron	9/25/2008	1
10	2	Facility	Facility readiness	Establish clear responsibilities for facility project manager	Ron	9/30/2008	1
	3	Facility	Facility readiness	Finalize financing for building improvements (work with IFF)	Ron	9/30/2008	1
12	5	Operations, Finance & Admin	Finances	Create financial management plan	NUSH Busine	9/1/2008	1
	6	Operations, Finance & Admin	Finances	Finalize choice for MIS's and accounting software (current option disc	NUSH Busine	9/1/2008	1
	7	Operations, Finance & Admin	Finances	Refine process and responsibility for managing school revenue and e	NUSH Busine	9/30/2008	1
	8	Operations, Finance & Admin	Finances	Establish school bank accounts and make other banking arrangemen	NUSH Busine	9/30/2008	1
	9	Operations, Finance & Admin	Finances	Refine internal controls and number of check signers required	NUSH Busine	9/30/2008	1
	10	Operations, Finance & Admin	Finances	Finalize financial management policies	NUSH Busine	10/1/2008	1
	15	Operations, Finance & Admin	Finances	Arrange payroll system	NUSH Busine	9/1/2008	1
	45	Operations, Finance & Admin	HR	Determine the hiring protocol and process for start-up, Y1, and ongoi	Ana/NUSH H	9/1/2008	1
	46	Operations, Finance & Admin	HR	Develop faculty and non-instructional staff recruiting strategy and tim	Ana	9/1/2008	1
	47	Operations, Finance & Admin	HR	Develop instructional staff recruiting strategy and timeline	Ana	9/1/2008	1
	48	Operations, Finance & Admin	HR	Ensure hiring process compliance with ADA and section 504	Ana	9/1/2008	1
	62	Operations, Finance & Admin	HR	Screen applicants, including checking references, and prepare list of	Ana/Ron	10/1/2008	1
	68	Operations, Finance & Admin	HR	Develop "at will" employment contract	Ron	9/1/2008	1
	69	Operations, Finance & Admin	HR	Develop background check procedure (include FBI & Child Abuse &	Ron	9/1/2008	1
	71	Operations, Finance & Admin	HR	Create employee handbook	Ana/Ron	10/1/2008	1
	73	Operations, Finance & Admin	Marketing	Determine primary spokespeople for the school and their areas of fod	Ana/Ron	9/1/2008	1
	74	Operations, Finance & Admin	Marketing	Issue press release to announce planned school	Ana/Ron	9/1/2008	1
	97	Operations, Finance & Admin	Technology	Complete e-rate discount program application	NUSH IT Dire	9/1/2008	1

This information was prepared by Bain & Company.

Overview of high level timing

#	Design Area	Category	August 2008	September 2008	October 2008	November 2008	December 2008	January 2009	February 2009	March 2009	April 2009	May 2009	June 2009	July 2009	August 2009
1	Mission	School design													
2	Culture	Activities													
		Artifacts													
		Behaviors													
		Policies													
		School calendar													
		Support systems													
		Weekly schedule													
3	Leadership	Board													
4	Teachers	Development													
		Evaluation													
		Recruiting													
5	Instruction and Programming	Instruction													
		Programming													
6	Student recruitment	Admissions													
		Induction													
		Outreach													
7	Specialized Instruction	ELL													
		Homelessness													
		Special education													
		Staffing													
8	After-school programming	Design													
		Implement													
9	Parents/ community	Community													
		Parents													
10	Facility	Facility readiness													
		Facility search													
11	Schoolwide Data and Assessment	Academic Assessments													
		Accountability													
		Schoolwide Assessments													
12	Operations, Finance & Administration	Finances													
		Food Service Program													
		Health & Safety													
		HR													
		Marketing													
		Procurement													
		Reporting & Compliance													
		Technology													
		Transportation													

Determines which month activities in categories are scheduled to begin

Useful to prioritize timing, for example, teacher recruiting is an important early activity…

…while Health & Safety activities begin in the Winter

This tab is useful to get a graphical overview of when activities within categories are starting, which can help prioritization and planning

This information was prepared by Bain & Company.

Appendix: Instructions

Orientation to this file - Reporting Tabs

There are 6 tabs:

1. School Start-up Plan. This tab is the master tab, tracking all activities and dates. When changing, adding, or updating activities or dates, use only this tab. The other tabs will update automatically.

2. Overall Progress. Use this tab to get a high level summary of progress to date, by Design Area

3. Monthly Check List. Use this tab to pull all active and late activities, as well as those beginning in the current calendar month

4. Check List by Owner. Use this tab to pull the monthly report by owner. (e.g. All of Ron's tasks in August 2008)

5. Red Report. Use this tab to see what activities are late or behind schedule.

6. Timing. This tab provides a high level view of activities start months by category, useful for planning.

Orientation to this file - Color Codes

School Start Up Plan

    Green - Active, On Track: The activity is currently open and on-track

    Yellow - Concern: The activity is due within the number of days to the right, including today (you can change it in Excel)

    Red - Off Track: The activity is late by at least the number at right (you can change it in Excel)

Overall Progress Tab

    Green: No late or concerned activities

    Yellow: Late activities between 1 and the number required for red, cell C21 (Will automatically change based on Red)

    Red: Late or concerned activities greater than or equal to the number at right (you can change it at right in Excel)

Appendix: Instructions

Adding New Tasks

New tasks/activities should be added on the "1. School Start-up Plan" tab only

To preserve the numbering, add items at the end of each section (e.g. the next item in culture is 2.44)

Once added, drag down* cells in column "I". This will auto-fill the "Start Date," using Due Date and Duration

Once added, drag down cells in column "M". This will auto-fill the "Status"

Once added, drag down cells in columns "Q" through "W". This will auto-fill the reporting functions.

Columns "Q" through "W" may be hidden. To unhide the columns, select the columns on either side of the hidden columns, in this case "P" and "AC"

Once selected, right click the mouse and select "Unhide" from the menu.

Columns may be hidden by selecting them and then clicking "Hide" from the menu

To "drag down" cells, select the cell above the blank cell and move the cursor over it.

Move the cursor to the lower right corner of the cell, so it changes from a white cross to a black cross

Push and hold the left mouse button, and drag the mouse down until the cell fills. Release the left button

*The copy/paste function can also be used to fill the cells.

Changing Dates

Dates should be changed on "1. School Start-up Plan" tab only

Change the "Due Date" or "Duration" columns.

Column "I", Start Date, is auto-filled using the Due Date and Duration - DO NOT CHANGE THIS COLUMN

The "Start Date" is calculated by taking the "Due Date" and subtracting "Duration"

Changing Owners

Owners can be changed in "1. School Start-up Plan" tab only

Change the "H" owner column

Be careful to type the name exactly as it appears elsewhere to maintain the integrity of the reports

Using Filters

Tab 1. School Start-up Plan currently uses filters (The down arrows at the top of each column)

Filters can be used to select, or filter, for certain items. For example, filtering for "Teachers" in design area will return all items in the Teacher category

Filters can be turned off/on using the "Data" menu, "Filter", "AutoFilter"