Top Ten Year Zero Action Items

This document outlines the most common action items schools experience during their planning year. Knowing these items will help you plan accordingly to be successful! Please visit http://www.newyorkcharters.org/compliance/ for more information.

Action Item	Why it Matters	What to Do
1. Understand the Prior Action Checklist	- The Prior Action checklist indicates the baseline items that must be completed to open your school. - The major hurdles that new schools encounter are obtaining a facility, hiring a school leader, and hiring staff including a school nurse.	- Familiarize yourself with this list EARLY and refer back to it at least once a month during your planning year to ensure you're on track for opening—and reach out to the Institute if any items aren't clear! - Start facility planning immediately! Obtaining and renovating a space is a big project that requires planning several months in advance of opening.
2. Set up the Education Corporation's Board of Trustees and maintain compliance with the NY Open Meetings Law and Public Officers Law	It's required, but more importantly, good board governance sets the groundwork for effective management of your organization.	Once the NYS Board of Regents issues your charter, you need to officially meet and organize your board, adopt by-laws, set the number of trustees, elect officers, form committees, and potentially add new members.
3. Complete both federal and state tax-exempt status within one year of receiving charter	It's required by statute, but more importantly, it saves you money.	Be sure to complete applications for both federal and state tax-exempt status. By statute, this must be completed within one year of receiving your charter.
4. Start staff and student recruitment early on	- This one's pretty obvious—if you don't have enough staff you can't run your school, and if you don't have enough students, you won't have enough money. - The Student Application is due to the Institute by January 2nd, and the Student Recruitment Summary is due by January 15th.	- You should identify and hire a head of school at least 6 full months before opening. - Hire certified teachers or teachers who meet the exemption qualifications in Education Law § 2854(3)(a-1). - You should start recruiting students as early as possible to ensure you meet enrollment targets.

5. Complete board governance training	• Your board needs to have a clear plan for how they will set and manage against strategic goals. • Your board will understand the laws and regulations that govern charter school boards.	• Ensure board undergoes training at least 6 months before your school opens. • Familiarize with the Open Meetings Law, Education Law, General Municipal Law, and Not- For-Profit Corporation Law.
6. Set up good data systems	• You need to have a plan in place to collect and use student demographic and achievement data before you open.	• Research options early in your planning year to ensure that your data systems are ready when students arrive.
7. Maintain complete staff fingerprints records and controls	• Required by law, but also ensures that your student and staff are safe.	• Make sure two persons have access to and review fingerprint records. • Fingerprint every staff member well in advance of the first day of classes and ensure that records are accessible to the Institute for Prior Action process.

8. Include mandated and relevant information and documents on the school's website	• Set up your website and be sure to update it regularly to ensure all information is accurate and up-to-date.
	• Provide access in languages spoken in your target community.
		• Make sure you have posted:
		  o Upcoming board meetings in compliance with; Public Officers Law;
		  o Link to the Committee on Open Government;
		  o FOIL subject matter list and the FOIL Records Access Officer; and
		  o Annual Report (not required until after your first year open).

9. Store student health and academic records properly	• This ensures the safety of your students, and is a matter of legal compliance.	• Student health records (immunization info, etc.) must be stored separately from other student records, and nurse must have access. • Academic records must be stored and kept in compliance with all FERPA procedures.
10. Reach out to build relationships with district contacts (CSE, business office, etc.)	• You'll be interfacing with certain district contacts a LOT, and building a good relationship will make life significantly easier.	• Plan when you will reach out to key contacts at the district and introduce yourself.