



SCHOOL ANNOUNCEMENT: BOSTON
NETWORK GUIDE

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Part I: School Announcement Overview for Leaders in Residence

Essential Questions

When is a new school announced publicly?

Who are the key audiences?

What roles do the Leaders in Residence, Home Office staff, district staff, and other stakeholders play?

What are the key communication nuances that Leaders in Residence should keep in mind?

Network Guide Overview

UP Education Network's Philosophy

The Announcement Checklist Network Guide describes the process by which a new school in the UP Education Network is announced publicly. This information is critical to the opening of a successful school opening, as it is UP Education Network's opportunity to make a first impression on the school's future students, families, and community stakeholders. The ripple effect created by a successful school announcement carries well into the school's opening years in the way of parental involvement, operational clarity around the transition, community support, and public perception.

Key Network Guide Components

The components of this Network Guide will aim to answer the Essential Questions above in a coherent, efficient fashion. They are as follows:

1. Responsibilities and Outcomes: A breakdown of who manages the overall school announcement process and a list of key outcomes associated with the process;
2. Announcement Task List Breakdown: A week by week breakdown of the school announcement process, including each required task, task owners, key facts, and next steps;

Professional Development Overview:

While there is not a dedicated school announcement professional development, other professional development sessions preceding the school announcement process will provide Leaders in Residence with context and knowledge of Boston Public Schools, the breakdown of responsibility between school leaders

and the home office, and UP Education Network’s family and community engagement strategies. These professional development sessions include:

Topic	Date
History and Context of Education in Boston	September 11
Service Grid	September 18
Family Buy-in (Community and Family Engagement)	January 15

Additionally, the following Network Guides will supplement the information included in this Guide to provide Leaders in Residence with a complete understanding of UP Education Network’s home office team and breakdown of responsibilities, family and community engagement strategies, and External Relations and District Relations policies, protocols, and norms as they relate to school announcement. These Network Guides include:

- UP Education Network Guide: Strategic Plan, Service grid, Description of Terms
- Family and Community Engagement and Student Enrollment (pre-launch)
- Stakeholder Management

Assessment of Progress

School Announcement is swiftly moving work stream that doesn't provide significant opportunities to assess progress. As included in the Announcement Task List Breakdown below, there are two opportunities to assess progress and adjust either the process or timeline: 1) After meeting with key district stakeholders in week 1 to align on the process, and 2) At the beginning of week 2. Each of these assessments will be completed by the Chief of Staff with the President’s support.

Standardized Elements

The general school announcement process, including the timeline on which it occurs, is standardized and each element of the School Announcement Task List must be included barring changes made by the Chief of Staff and President.

Customized Elements

Leaders in Residence can customize certain elements of their family and community outreach to meet the needs of their specific school and community contexts. For example, if Leaders in Residence wish to add elements of family or community outreach to the School Announcement Task List they can explain their intended addition to the Chief of Staff and President in order to gain approval.

Lessons Learned

- The School Announcement process is fast moving and sometimes messy! These 4-5 weeks often entail late night adjustments to plans or documents based on internal and external development and require the team to be monitoring email traffic closely
- As detailed in the Family and Community Engagement and Student Enrollment Network Guide, projects involving outreach to families should be managed using a detailed checklist that tracks all communication, assigns owners, and updates contact information
- Announcements and external communication is often “embargoed” until a final approval is given by district stakeholders – ensure that these embargoes are not breeched and that event sequences are understood thoroughly
- The Chief of staff will send out updated School Announcement task Lists multiple times throughout the announcement process – ensure you have reviewed these documents thoroughly after each update
- Plan ahead: documents are often approved, edited, and sent out in a matter of hours during the school announcement process, so developing a foundation of draft emails, letters, and checklists well in advance is vital to being able to react quickly to changing circumstances.

Supporting Documents

- Model Announcement Task List
- Model Press Release
- Model Broad Stakeholder Group Announcement

Part II: School Announcement Timeframe for Launch Year

Timeline

The announcement process can only begin once the Commissioner invited UP Education Network and the UP Academy Board of Trustees to submit a final charter application and Boston Public Schools has identified a school to be managed by UP Education Network. At this point, UP Education Network's intent to open a new school in Boston Public Schools will be public information and the public will be seeking further details. Thus, the announcement process is typically initiated in late September or early October and extends into late October or early November.

Length

Depending on the size and complexity of the school to be announced, the announcement process takes between four and five weeks.

July	Activity: Deadline: <ul style="list-style-type: none"> • July 1: Letter of Intent due to DESE • July 29: Prospectus due to DESE
August	Activity: Deadline:
September	Activity: Deadline: <ul style="list-style-type: none"> • Mid-September: Commissioner approves Prospectus and invites the Board to apply for a charter • Immediately proceeding charter Invitation: School announcement process is initiated by Chief of Staff
October	Activity: <ul style="list-style-type: none"> • UP Education Network team engages in school announcement

	<p>process</p> <p>Deadline:</p>
November	<p>Activity:</p> <p>Deadline:</p> <ul style="list-style-type: none"> Schol announcement process is complete
December	<p>Activity:</p> <p>Deadline:</p>
January	<p>Activity:</p> <p>Deadline:</p>
February	<p>Activity:</p> <p>Deadline:</p>
March	<p>Activity:</p> <p>Deadline:</p>
April	<p>Activity:</p> <p>Deadline:</p>
May	<p>Activity:</p> <p>Deadline:</p>
June	<p>Activity:</p> <p>Deadline:</p>

Part III: School Announcement Network Guide

Responsibilities and Outcomes

Owner

UP Education Network's Chief of Staff is ultimately responsible for ensuring the announcement process is completed successfully, and he/she manages the team's work on the various announcement sub-tasks and completes all task-list maintenance and communication. While the process is managed by the Chief of Staff, multiple members of the Home Office staff as well as the Leaders in Residence play significant roles.

Key Outcomes

By the end of the school announcement process, the following major outcomes should occur:

1. Parents have been informed of the change and have been given an opportunity to provide feedback.
2. Existing teachers at the school have been informed and understand their next steps.
3. An announcement, typically via newspaper, has been released to the public.
4. UP Education Network's broad stakeholder group has received the announcement
5. UP Education Network's website, including updated talent-recruitment information, has been published.

Announcement Task List Breakdown:

Week 1

1) Task: Meet with Internal Announcement Team to Finalize Timeline and Task List

Owner: Chief of Staff

Support: President

Key Facts: This step can take place once the Chief Executive Officer and President have secured a signed Memorandum of Intent from the district.

Next Steps: The Chief of Staff initiates his/her management of the announcement process, including the distribution of the finalized task list.

2) Task: Create a Google Voice Number for the Family Hotline

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: Google Voice is a free service that allows parents to call in with questions or concerns. Google Voice can link to multiple phones, creates written transcripts of voicemail, and is accessible online. More information, including set-up instructions, can be found at: <http://www.google.com/googlevoice/about.html> . Please reference the Student Enrollment and Student/Family Outreach Network Guide for more detailed instructions.

Next Steps: The Director of Operations in Residence manages parent phone calls once the Google Voice number has been set up.

3) Task: Secure a Phone for the Family Hotline

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: This step is optional, as some Directors of Operations in Residence choose to rely only on Google Voice rather than purchasing a phone to supplement the use of Google Voice. Please reference the Student Enrollment and Student/Family Outreach Network Guide for more detailed instructions.

Next Steps: If a phone is purchased, the Director of Operations in Residence is responsible for keeping the phone in their possession.

4) Task: Connect to the Boston Public Schools Data and Enrollment Liaison

Owner: Director of School Operations

Support: Director of Operations in Residence

Key Facts: The main purpose of this step is to ensure Leaders in Residence have access to enrollment data, including parent contact information, so families can be contacted by phone or mail in the third week of the announcement process. The key liaisons for student enrollment data at Boston Public Schools are Evelyn Adario (eadario@boston.k12.ma.us) and Jerry Burrell (jburrell@boston.k12.ma.us). Key members of UP Education Network's staff will be required to sign a confidentiality agreement before receiving access to student enrollment information.

Next Steps: During the school's announcement, enrollment data will be used by the Director of Operations in Residence to create phone-a-thon call lists, mailing lists. The Director of School Operations should coordinate with UP Education Network's staff to have a confidentiality agreement signed and returned to Boston Public Schools

5) Task: Confirm Prominent Languages Spoken by Families at the School

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: The most prominent languages spoken by families and students in the Boston Public School system are English, Spanish, Cape Verdean Creole, Chinese, Haitian Creole, Portuguese, Somali and Vietnamese. When requesting enrollment information (see above) ensure that the “Language Spoken at Home” is a category provided.

Next Steps: Use language information to determine translation plans for website and communication to families.

6) Task: Establish a Language Plan for Family Phone-a-Thons and Letters

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: For detailed information and an example of a language plan, including translation resources, please reference the Student Enrollment and Student/Family Outreach Network Guide. A Language Plan should ensure all languages spoken by families in the school are incorporated into written and verbal communication resources.

Next Steps: Ensure Language Plan is implemented in all written and verbal communication to families, including website content, phone outreach, fliers, letters, and in-person communication.

7) Task: Establish a Language Plan for the Family Hotline

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: For detailed information and an example of a language plan, including translation resources, please reference the Student Enrollment and Student/Family Outreach Network Guide. A Language Plan should ensure all languages spoken by families in the school are incorporated into written and verbal communication.

Next Steps: Ensure Language Plan is implemented when non-English speaking families call the Family Hotline

8) Task: Establish a Plan for Contacting Key Community and Political Stakeholders

Owner: Chief of Staff

Support: President

Key Facts: The Chief of Staff, in partnership with a Dean of Families and Communities, if available, will establish this plan. The plan should include a list of all key local politicians, neighborhood association leaders, business leaders, and religious leaders.

Next Steps: Communicate list to Board of Trustees to assess preexisting connections and assign appropriate board members to contact key external stakeholders. Implement plan internally.

9) Task: Meet with Boston Public Schools' External Relations Liaison to Align on Announcement Timeline and Components

Owner: Chief of Staff

Support: President

Key Facts: Boston's key External Relations Liaisons is Lee McGuire (lmcguire@boston.k12.ma.us). The school's academic superintendent should also be involved in the planning process. During this meeting, the following details should be confirmed:

- Announcement method and timeline
- The school's name
- Family communication method and timeline (family communication should occur the same day Boston Public Schools' press release is sent to news outlets)
- School location and high level space usage needs
- Enrollment nuances (i.e. how many students are currently enrolled? Are there any special student populations at the new school? etc.)
- Confirmation of date and meeting space for initial family info session
- Contact information and approval to communicate with existing school principal
- Date on which UP Education Network's recruitment materials can be updated to indicate the school's location and new name
- Date on which UP Education Network may hold a Family Info Session – ideally in week 5 on announcement process (this item may be confirmed at a later date)
- Plan for Boston Public Schools reaching out to Boston Teachers Union

Next Steps: Adjust the Announcement Checklist as needed based on timeline and task recommendations given at the meeting. Distribute the edited list internally.

10) Task: Hold Conference Call with UP Academy Board of Trustees

Owner: President

Support: Chief of Staff

Key Facts: This call serves the purpose of informing the board of trustees of the following:

- Announcement timeline, especially estimated time of press releases
- Key communication points board members should emphasize if contacted by the press
- Issues that are sensitive due to their potential perception by community or district stakeholder
- A communication plan for sharing news quickly, given open meeting law
- A plan for board members contacting key community leaders to field any questions shortly after the press release is made public

Next Steps: Follow up with board members once a specific press release date is confirmed with the district. Include board members on broad stakeholder announcement.

11) Task: Finalize Website Announcement and UP Education Network Press Release Content

Owner: Manager of External Relations

Support: Senior Coordinator of Development and External Relations

Key Facts:

- Announcement should include pertinent information including the existing school name, future school name, grades served, and opening date
- The press release should contain additional details about UP Education Network's network, the organization's broader work taking place in Boston Public Schools, and quotes from the Chief Executive Officer and Superintendent
- A "Model Press Release" is attached in the Supporting Documents section
- This step does not include the actual publishing of the announcement or press release
- The initial website announcement, once approved for publishing, will be posted on UP Education Network's website, not a school-specific site
- The press release, once approved for publishing, will be sent to local news outlets.

Next Steps: Once approved in week 2, the announcement and press release will be published.

12) Task: Finalize Content for Internal Letter to Families

Owner: Director of Operation in Residence

Support: Director of School Operations

Key Facts: For detailed information on family communication content, please reference the Student Enrollment and Student/Family Outreach Network Guide.

Next Steps: Once the district approves family communication, letter should be sent out using both the "backpack" method, and regular mail.

13) Task: Gain District Approval of Content of Internal Letter to Families

Owner: Chief of Staff

Support: President

Key Facts: The Superintendent or Academic Superintendent typically request approval of all communication with families. Work with Lee McGuire to gain this approval.

Next Steps: Once Boston Public Schools approves the letter's content the Director of Operations in Residence should proceed with letter translation.

14) Task: Ensure Website Announcement and Press Release are Appropriately Translated

Owner: Manager of External Relations

Support: Senior Coordinator of Development and External Relations

Key Facts: Translation often includes multiple languages (Spanish, Haitian Creole, Vietnamese, etc.) This step does not include the actual publishing of the announcement or press release. The initial website announcement, once approved for publishing, will be posted on UP Education Network's website, not a school-specific site. The press release, once approved for publishing, will be sent to local news outlets.

Next Steps: Once approved in week 2, the announcement will be published online

15) Task: Ensure Internal Letter to Families is Appropriately Translated

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: For detailed information on translation resources, please reference the Student Enrollment and Student/Family Outreach Network Guide.

Next Steps: Once the district approves family communication, letter should be sent out using both the "backpack" method, and regular mail.

Week 2

16) Task: Assess Progress

Owner: Chief of Staff

Support: President

Key Facts: At the beginning of week 2, the Chief of Staff and President will meet to assess UP Education Network's progress in completing the tasks included in week 1.

Next Steps: Depending on the level of progress made, the Chief of Staff may disseminate a revised School Announcement Checklist to the home office team and Leaders in Residence.

17) Task: Establish Messaging for Receiving Phone Calls on the Family Hotline

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: For detailed information and an example of a Family Hotline messaging guide, please reference the Student Enrollment and Student/Family Outreach Network Guide. Directors of Operations in Residence often own the bulk of communication on the Family Hotline, but can

expect support from the Director of School Operations, Senior Office Coordinator, Principal in Residence, and any Deans on staff while the Family Hotline is active.

Next Steps: Communicate Messaging guide to staff involved in Family Hotline communication.

18) Task: Establish a Tracking System for the Family Hotline

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: Each phone call received on the Family Hotline should be tracked to ensure timely and effective follow-up. The tracking system should include, at minimum, columns for parents/guardian name, student name, student grade, phone number, email address, message notes, and next steps/follow up required. This tracking system will be most effective in the Google Document format, so multiple users can access and edit the content simultaneously.

Next Steps: Ensure all staff members involved in Family Hotline communication are introduced to the tracking system and are aware of the protocol for ensuring edits and necessary follow-ups are communicated to the appropriate owners.

19) Task: Establish Messaging Guide and Tracking System for Phone Outreach

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: For detailed information and an example of a phone call messaging guide, please reference the Student Enrollment and Student/Family Outreach Network Guide. Directors of Operation in residence should expect 8-12 home office staff members to volunteer to assist in all family phone outreach. Ensure messaging guide clearly articulates the logistical steps (i.e. how to track calls, appropriate times of day for calls, information requiring immediate follow-up with DOOs, etc.) of the phone call process in addition to key messaging for families.

Next Steps: Send final phone outreach details to all staff members participating in upcoming phone outreach at least 2 days prior to phone-a-thon date.

20) Task: Coordinate Distribution of Boston Public Schools Press Release to News Outlets

Owner: Manager of External Relations

Support: Chief of Staff

Key Facts: The following details should be confirmed:

- Ensure UP Education Network will be given a chance to review final press release content before it is sent to news outlets
- Time of day Boston Public Schools will send the press release to news outlets

- Confirm that Boston Public Schools will send a letter to families the same day they send their press release
- Window of time Boston Public Schools will give news outlets to publish the press release before UP Education Network can “go public” with website, Unlocking-Potential’s press release, and Family hotline

Next Steps: Once the agreed upon window of time has passed after Boston Public School sends their press release to the local news outlet, and once the Chief of Staff has confirm Boston Public Schools as sent out their family letter (see next task below), the Chief of Staff will notify UP Education Network Staff that the following tasks can be completed:

- Go Live with Family Hotline
- Send UP Education Network Press Release to News Outlets
- Send UP Education Network Announcement to Broad External Stakeholder Group
- Post Announcement on UP Education Network Website

21) Task: Coordinate the Distribution of Boston Public Schools’ Letter to Families

Owner: Chief of Staff

Support: President

Key Facts: Ensure President, Director of School Operations, and Manager of External Relations have reviewed the letter for factual accuracy. Ensure internal team members are aware that the district’s letter has been distributed

Next Steps: Chief of Staff ensures the appropriate team members implement the following next steps:

- Go Live with Family Hotline
- Send UP Education Network Press Release to News Outlets
- Send UP Education Network Announcement to Broad External Stakeholder Group
- Post Announcement on UP Education Network Website

22) Task: Hold Conference Call with UP Academy Board of Trustees

Owner: President

Support: Chief of Staff

Key Facts: Communicate final press release details, including any changes made following the initial conference call, to board of trustees. If necessary, confirm that board members will contact key community leaders to field questions regarding the press release if necessary.

Next Steps: Board members reach out to key community leaders.

23) Task: Go Live with Family Hotline

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: Boston Public Schools press release and letter to families may include the UP Education Network Family Hotline number. Thus, at the time either of those steps are completed by Boston Public Schools the Director of Operations in Residence should be prepared to notify the staff responsible for answering calls to the Family Hotline.

Next Steps: Initiate Family Hotline Tracking System.

24) Task: Send UP Education Network Press Release to News Outlets

Owner: Manager of External Relations

Support: Senior Coordinator of Development and External Relations

Key Facts:

- This step should not be completed until the Chief of Staff gives a final approval. Boston Public Schools will have already sent a press release to its local news outlet of choice (likely the Boston Globe)
- This Press Release should be sent to other local outlets, but not until the Boston Public Schools Release has had a reasonable “publishing window” – usually 24 hours after receipt and families have received their notification letters from Boston Public Schools
- All language in the internal press release should be approved by the Chief Executive Officer
- See the “Model Press Release” Supporting Document for an example.

Next Steps: The Manager of External Relations should be prepared to answer any questions from news outlets and track any news resulting from the dissemination of the press release. Notify the Chief of Staff when this task is complete.

25) Task: Send UP Education Network Announcement to Broad Stakeholder Group

Owner: Manager of External Relations

Support: Senior Coordinator of Development and External Relations

Key Facts:

- This step should not be completed until the Chief of Staff gives a final approval. Boston Public Schools will have already sent a press release to its local news outlet of choice (likely the Boston Globe)
- This announcement should not be sent until the Boston Public Schools press release has had a reasonable “publishing window” – usually 24 hours after receipt and families have received their notification letters from Boston Public Schools.
- All language in the announcement to the broad stakeholder group should be approved by the Chief Executive Officer
- See the “Model Broad Stakeholder Group Announcement” Supporting Document for an example

Next Steps: The Manager of External Relations and Chief Executive Officer should manage the flow of responses to the announcement. Notify the Chief of Staff when this task is complete.

26) Task: Send Announcement Email to all UP Education Network Staff (Including Teachers)

Owner: Chief Executive Officer

Support: Manager of External Relations

Key Facts:

- This step should not be completed until the Chief of Staff gives a final approval. Boston Public Schools will have already sent a press release to its local news outlet of choice (likely the Boston Globe)
- This email should not be sent until the Boston Public Schools press release has had a reasonable “publishing window” – usually 24 hours after receipt and families have received their notification letters from Boston Public Schools.
- All language in the website announcement should be approved by the Chief Executive Officer

Next Steps: N/A

27) Task: Post Announcement on UP Education Network Website

Owner: Senior Coordinator of Development and External Relations

Support: Manager of External Relations

Key Facts:

- This step should not be completed until the Chief of Staff gives a final approval. Boston Public Schools will have already sent a press release to its local news outlet of choice (likely the Boston Globe)
- This announcement should not be published until the Boston Public Schools press release has had a reasonable “publishing window” – usually 24 hours after receipt and families have received their notification letters from Boston Public Schools
- All language in the website announcement should be approved by the Chief Executive Officer
- See the “Model Website Announcement” Supporting Document for an example

Next Steps: Notify the Chief of Staff when this task is complete.

28) Task: Establish a Student/Family Website Page Dedicated to the New School

Owner: Senior Coordinator of Development and External Relations

Support: Manager of External Relations

Key Facts:

- This step should not be completed until the Chief of Staff gives a final approval Boston Public Schools will have already sent a press release to its local news outlet of choice (likely the Boston Globe)
- This web page should not be published until the Boston Public Schools press release has had a reasonable “publishing window” – usually 24 hours after receipt and families have received their notification letters from Boston Public Schools
- All language in the web page should be approved by the Chief Executive Officer.

Next Steps: Notify the Chief of Staff when this task is complete.

29) Task: Hold Introductory Meeting with Existing Principal

Owner: President

Support: Principal in Residence

Key Facts: This meeting is very significant, and represents our organization’s chance to make a positive first impression and create a strong working relationship with the existing principal. UP Education Network will rely on this individual to assist with numerous tasks moving forward and in some cases future UP Education Network schools will share space with a school lead by this individual. Additionally, this individual is in an extremely challenging situation, as they have likely recently been informed of their school’s future closure. The following topics should be covered during this meeting:

- Share remaining announcement plan details and timeline.
- Gain permission to contact existing teachers with an informational letter/email.
- Gain permission and confirm logistical details (dates, times, room reservation at the school, etc.) for Office Hours for existing teachers
- Gain permission and confirm logistical details (day, time, delivery method, timeline for letter delivery, etc.) to send a letter to families
- Review a preliminary list of questions around facilities and enrollment details
- Confirm the date for a family night in week 5

Next Steps: The President reviews the details of this meeting with the Chief of Staff so the Announcement Checklist can be adjusted if necessary. The President also shares other pertinent information with the UP Education Network Talent, Operations, Academic, and Finance teams.

30) Task: Make Initial Contact (via letter in mailboxes or email) with Existing Teachers

Owner: Chief Talent Officer

Support: Manager of Talent

Key Facts: This step should not be completed until contact has been made with the existing principal and he/she has granted UP Education Network approval to contact teachers. Teachers should be informed of Office Hours in this contact.

Next Steps: The Chief of Staff should be notified when this task is complete.

31) Task: Stuff and Prepare Family Letters

Owner: Director of Operation in Residence

Support: Director of School Operations

Key Facts: The Director of Operations in Residence should utilize a temporary worker to complete this task. UP Education Network typically uses PSG Staffing for temporary workers. The task will likely take 4-6 hours to complete.

Next Steps: Send introductory letters to families (see below)

32) Task: Update Job Postings to Reflect Announcement

Owner: Manager of Talent

Support: Senior Coordinator of Recruitment

Key Facts: The Chief of Staff will indicate when this update can be made.

Next Steps: Update the school's name and location on other recruitment materials.

33) Task: Send Introductory Letters to Families

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: Letters should either be sent through mail or via the backpack method, or using both methods to ensure successful delivery.

Next Steps: Inform Chief of Staff when this task has been completed. Ensure Family Hotline is staffed and prepared to accommodate an increase in traffic.

Week 3

34) Task: Final Phone Outreach Plan Details are Communicated with UP Education Network Team

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: Logistics should be shared at least two days in advance of any planned outreach. The Director of Operations in Residence should emphasize that staff need to rehearse their calls and follow up directly to the Director of Operations in Residence with any urgent or time sensitive information.

Next Steps: Send 1-2 update emails throughout phone outreach to encourage staff to meet outreach goals. Follow up on any urgent / time sensitive issues relayed by staff. Monitor phone

outreach tracker during phone outreach process to identify any common mistakes or frequent comments.

35) Task: Meet with Boston Public Schools to Discuss a Preliminary Staffing Plan

Owner: Chief Talent Officer

Support: Principal and Manager of Talent

Key Facts:

- Before completing this task, assess updated enrollment projections and consider any special student populations
- Confirm each potential staff member's union classification and pay scale information
- Confirm that funding for each position will be included in the school's allocation, as opposed to being centrally funded or hired separately by UP Education Network.

Next Steps: Chief Talent Officer provides Associate Director of Finance and Director of School Operations with updated budgetary information related to staff expenses.

36) Task: Phone Outreach to School Families Begins

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: For detailed information on phone outreach, please reference the Student Enrollment and Student/Family Outreach Network Guide. This process should take place over a 3-5 day span. Directors of Operation in residence should expect 8-12 home office staff members to volunteer to assist in all family phone outreach

Next Steps: Update all family contact trackers based on updated information gained during the phone outreach process. Update staff on family contact during a subsequent full staff meeting.

Week 4

37) Task: Send out a Second Flyer/Letter to Families Notifying them of Upcoming Family Info Session Hours and any New Information

Owner: Director of Operations in Residence

Support: Director of School Operations

Key Facts: Check with the Chief of staff to ensure all information has been confirmed with Boston Public Schools and the existing school principal

Next Steps: Be prepared to answer any follow-up questions on the family hotline. Solicit UP Education Network staff volunteers to assist with set-up and take-down during the family info session

38) Task: Hold Office Hours for Existing Teachers

Owner: Director of Recruitment

Support: Coordinator of Recruitment

Key Facts: In addition to gathering information via a brief presentation, existing teachers should have the opportunity to meet one-on-one with UP Education Network's recruitment staff. UP Education Network's Talent staff should be prepared to provide information on UP Education Network, the organization's work in Boston, the future school's main features, and key differences in working conditions and staff expectations between the existing and future schools. The Principal in Residence should not be present for this task.

Next Steps: Initiate the interview process for promising candidates

39) Task: Contract Negotiation is Initiated

Owner: President

Support: Chief of Staff

Key Facts: The President and Chief of Staff should initiate this conversation with Boston Public Schools' Interim Superintendent, John McDonough (jmcdonough@Boston.k12.ma.us). The President and Chief of Staff should come prepared with a draft contract, including a proposed budget and key changes from the previous year's contract with a rationale for the changes.

Next Steps: The President should inform the Chief Executive officer of progress made toward agreeing on a contract. The President should follow up with the Chief Operating Officer and Associate Director of Finance with any changes affecting the school's budget.

40) Task: Full School Website is Published

Owner: Senior Coordinator of Development and External Relations

Support: Manager of External Relations

Key Facts: Depending on whether or not the Principal in Residence has been formally approved by the Interim Superintendent and UP Academy Board of Trustees, the names of the Leaders in Residence may not be approved for public posting on the website.

Next Steps: The website publishing should be followed up with a dissemination of the web address on social media and a link on the UP Education Network Website

Week 5

41) Task: Open House is Held for Families

Owner: Principal in Residence

Support: Director of Operations in Residence

Key Facts: For detailed information on Open Houses, please reference the Student Enrollment and Student/Family Outreach Network Guide. The President, Chief Academic Officer and Director of Special Education should attend this Open House to present on various components of UP Education Network as a network and on the new school's ELL and Special Education Services.

Next Steps: The Principal in Residence and Director of Operations in Residence follow up with families who had questions.

Part IV: Supporting Documents

Model Announcement Checklist

Boston UP Academy Announcement Checklist

No.	Task	Owner	Backup	Deadline	Completed	Notes
1	Meet with Internal team to Finalize Timeline and Task List	COS	President	30-Sep	-	-
2	Create a Google Voice Number	DOO	DSO	30-Sep		
3	Secure a Phone for the Family Hotline	DOO	DSO	30-Sep		
4	Connect to District Data and Enrollment Liaison	DSO	DOO	1-Oct		
5	Confirm Prominent Languages Spoken by Families and Students at the School	DOO	DSO	1-Oct		
6	Establish Language Plan for Phone-a-Thons and Letters	DOO	DSO	2-Oct		
7	Establish Language Plan for Family Hotline	DOO	DSO	2-Oct		
8	Establish a Plan for Contacting Key Community and Political Stakeholders	COS	President	3-Oct		
9	Meet with District External Relations Liaison to Finalize Announcement Details	COS	President	3-Oct		
10	Hold Conference Call with UP Academy Board of Trustees	President	COS	4-Oct		

11	Finalize Website Announcement and UP Press Release Content	MER	CER	4-Oct		
12	Finalize Content for Internal Letters to Families	DOO	DSO	4-Oct		
13	Gain District Approval of Content of Internal Letter to Families	COS	President	4-Oct		
14	Ensure Website and Internal Press Release are Appropriately Translated	MER	CER	4-Oct		
15	Ensure Internal Letter to Families is Appropriately Translated	DOO	DSO	4-Oct		
16	Assess Progress	COS	President	7-Oct		
17	Establish Messaging for Receiving Phone Calls on Family Hotline	DOO	DSO	8-Oct		
18	Establish a Tracking System for Family Hotline	DOO	DSO	8-Oct		
19	Establish Messaging Guide and Tracking System for Phone Outreach	DOO	DSO	8-Oct		
20	Coordinate Distribution of District Press Release to News Outlets	MER	COS	9-Oct		
21	Coordinate the Distribution of District Letter to Families	COS	President	9-Oct		
22	Hold Conference Call with UP Academy Board of Trustees	President	COS	9-Oct		
23	Go Live with Family Hotline	DOO	DSO	9-Oct		
24	Send UP Education Network Press Release to News Outlets	MER	CER	10-Oct		
25	Send UP Education Network Announcement to Broad Stakeholder Group	MER	CER	10-Oct		
26	Send Announcement Email to all UP Education Network Staff	CEO	MER	10-Oct		

27	Post Announcement to UP Education Network Website	CER	MER	10-Oct		
28	Establish a Student/Family Website Page Dedicated to the New School	CER	MER	10-Oct		
29	Hold Introductory Meeting with Existing Principal	Principal	Principal	11-Oct		
30	Make Initial Contact with Existing Teachers	CTO	DR	11-Oct		
31	Stuff and Prepare Family Letters	DOO	DSO	11-Oct		
32	Update Job Posting to Reflect School Announcement	MOR	COR	11-Oct		
33	Send Introductory Letters to Families	DOO	DSO	11-Oct		
34	Final Phone Outreach Plan Details are Communicated to Staff	DOO	DSO	14-Oct		
35	Meet with District to Discuss Preliminary Staffing Plan	CTO	DR/Principal	14-Oct		
36	Phone Outreach to Families Begins	DOO	DSO	16-Oct		
37	Inform Families of Family Info Session Hours	DOO	DSO	21-Oct		
38	Hold Office Hours for Existing Teachers	MOR	COR	21-Oct		
39	Contract Negotiation Initiated	Principal	COS	21-Oct		
40	Publish Full School Website	CER	MER	23-Oct		
41	Hold Open House for Families	Principal	DOO	31-Oct		

Model Press Release

EMBARGOED UNTIL

February 13, 2013

UP Education Network to turnaround its fourth school in fall 2013

Nonprofit will partner with Lawrence Public Schools to restart middle school grades of the Henry K. Oliver School as UP Academy Oliver Middle School

LAWRENCE, MA – February 13, 2013 – UP Education Network, the Boston-based nonprofit school management organization, has announced its plans to take on management of a second turnaround school in Lawrence, Massachusetts, beginning in fall 2013. UP Education Network will restart the underperforming Henry K. Oliver School as UP Academy Oliver Middle School, assuming management of the 6th grade during the 2013-14 academic year and expanding to grades 6-8 the following year; grades K-5 will not be included in the turnaround efforts. UP Academy Oliver will become UP Education Network's fourth turnaround school and second turnaround school in Lawrence.

UP Education Network's expansion in Lawrence is part of a broad series of reform efforts underway in the school district. In November 2011, the Massachusetts Board of Elementary and Secondary Education designated Lawrence as a chronically underperforming (Level 5) school district, giving Massachusetts Education Commissioner Mitchell Chester the authority to appoint Receiver Jeff Riley to run the city's schools. Lawrence was the first Level 5 school district to go under state control under legislation passed in 2010.

"We are excited to continue our unique partnership with UP Education Network," said Riley. "Turning around a school is hard work, but we are confident in UP Education Network's track record of success in Boston and Lawrence. The students at the Oliver are in good hands."

The organization's track record of success began when UP Education Network assumed management of the Gavin Middle School in the summer of 2011, restarting the Boston public school that fall as UP Academy Charter School of Boston. On the spring 2012 MCAS, UP Academy Boston ranked first among Massachusetts' district schools in median Student Growth Percentile (SGP) scores for Math, and first among Boston's district middle schools in SGP for English Language Arts only one year after UP Education Network assumed management of the underperforming school.

UP Education Network launched its second turnaround school in fall 2012, this time in Lawrence, MA. The school, UP Academy Lawrence Middle School, represented the restart of the chronically underperforming James F. Leonard Middle School. UP Academy Lawrence has remained a traditional district school throughout the turnaround effort, ensuring that the school enrolls the



exact same students that would have otherwise enrolled at the Leonard Middle School. UP Academy Lawrence currently serves more than 120 students in 6th grade and will serve more than three hundred students in 6th-8th grade beginning next fall. The school will be renamed UP Academy Leonard Middle School this summer.

With the expansion of UP Academy Lawrence and the launch of UP Academy Oliver, UP Education Network will expand its impact to nearly 500 middle school students in Lawrence this fall and more than 1,500 students across its network of schools.

UP Academy Oliver Middle School will be led by Principal Katie Abdelahad and Director of Operations Dave James, both current educators at UP Academy Charter School of Boston. The new school leaders will work collaboratively with parents and community leaders to ensure that families are prepared for the transition.

UP Education Network's changes will include an eight-hour extended student day, new academic and behavioral expectations for students, and the roll out of a broad network of academic and other student supports. Additionally, teachers will begin approximately twenty days before students arrive at the start of the school year for intensive orientation and planning.

"We are honored to work with the students and families of Lawrence, MA" said Scott Given, UP Education Network's Chief Executive Officer. "We believe that the students of Lawrence deserve an exceptional education, and we will continue to partner with Lawrence Public Schools until every family has access to an extraordinary school."

ABOUT UP EDUCATION NETWORK

UP Education Network is a nonprofit school management organization whose mission is to rapidly transform chronically underperforming district schools into extraordinary schools that sustain high achievement over time.

UP Education Network currently operates two schools, UP Academy Charter School of Boston and UP Academy Lawrence Middle School. In fall 2013, UP Education Network intends to transform the 600-student Marshall Elementary School into UP Academy Charter School of Dorchester pending charter approval. With the organization's expansion in Boston and Lawrence, UP Education Network will educate more than 1,500 students across two school districts in the 2013-14 academic year. UP Education Network intends to be operating eight turnaround schools, serving more than 3,500 students in Massachusetts in fall 2015.

For more information, visit www.upeducationnetwork.org.

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For more information, contact

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Model Broad Stakeholder Announcement

BROAD STAKEHOLDER EMAIL: UP Academy Oliver Statement

Dear Friends,

For the first time in our short history, we will restart two struggling schools in one academic year. Earlier today, we announced our intention to take on the management of our second underperforming school in Lawrence, Massachusetts, beginning in fall 2013. UP Education Network will restart the middle school grades of the underperforming Henry K. Oliver School as UP Academy Oliver Middle School, serving students in 6th grade during the 2013-14 academic year and expanding to grades 6-8 the following year. The school's elementary grades will not be included in UP Education Network's turnaround efforts. UP Academy Oliver will become our fourth turnaround school in Massachusetts.

The Oliver School was one of just three schools identified as a new "Level 4" underperforming school by the Massachusetts Department of Elementary and Secondary Education in 2012. In spring 2012, only 17% of the Oliver School's students were proficient in grade level math, and just 31% were proficient in ELA.

UP Academy Oliver will be led by Principal Katie Abdelahad and Director of Operations Dave James, both current educators at UP Academy Charter School of Boston. The new school leaders will work collaboratively with parents and community leaders to ensure that families are prepared for the transition.

Our restart of the Oliver builds upon the school turnaround work we have already spearheaded across the Commonwealth.

- UP Academy Boston, our first turnaround school, continues to deliver an outstanding education to nearly 500 students. Last year, students at the school demonstrated more academic achievement gains in mathematics than students at any other public middle school in Massachusetts.
- UP Academy Lawrence, to be renamed UP Academy Leonard Middle School this summer, opened in fall 2012. The school currently serves more than 120 students in 6th grade and will serve more than 350 students in 6th-8th grade beginning next fall.
- UP Academy Dorchester will open this fall, pending charter approval, as the restarted John Marshall Elementary School and will initially serve approximately 600 students in grades pre-K through five.

As we grow, we continue to move ever closer to eliminating the opportunity and achievement gaps for students in eastern Massachusetts. By this September, our organization's outstanding 200+ educators will be serving more than 1,500 students across Boston and Lawrence. All students deserve an exceptional education and we are prepared to do *whatever it takes* to deliver.



As always, our team is humbled by the task at hand and energized by our supporters. Your commitment to UP Education Network is deeply meaningful to me, my colleagues, and most importantly, to the families and communities we serve.

Best wishes,

Scott Given