



STUDENT ENROLLMENT AND FAMILY &
COMMUNITY RELATIONS (BOSTON)
NETWORK GUIDE

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Part I: Network Guide Overview for Leaders in Residence

1. Audience

This guide is intended for DOO LIRs, as well as first-year SPCs and OMs. First year DOOs may also find it useful to review, especially as it relates to lottery management.

2. Purpose

Provide DOO LIRs and DOOs with the information they need in order to effectively recruit and enroll students within state regulations (i.e., lottery) as well as engage in meaningful family and community outreach.

3. Essential Questions:

- *How do I engage in student enrollment?*
 - *What students should I focus on recruiting in the pre-launch year?*
 - *How do I conduct student and family outreach?*
 - *What is a student lottery? How do I prepare for and execute a successful lottery?*
 - *What is an ITE? How do I collect these?*
- *What are key family and community outreach strategies?*

4. Description of Student Enrollment and Family & Community Outreach Network Guide:

Student enrollment and family and community outreach is a critical piece of a Horace Mann Charter School's pre-launch year. In the pre-launch year, it is the school's priority – mandated by law – to recruit and re-enroll students from the school that is being restarted. This guide will help the LIR execute successful: application collection processes lotteries; ITE collection; and, family and community outreach. LIR will meet regularly with the Director of School Operations on student enrollment and family & community outreach. In addition, LIRs may receive a PD session aimed to distill the information provided in this network guide.

5. Assessment of Progress:

As stated above, LIRs will discuss this topic with the Director of School Operations on a weekly basis. LIRs should expect to provide monthly updates on applications, lottery outcomes, and ITEs throughout the year. LIRs should also be prepared to provide similar updates for the Board of the school as requested.

6. Standardized Elements

Application, lottery, and ITE requirements are dictated by DESE and/or BPS. Most of these processes are documented in the school's enrollment policy, which is approved by the school's Board and submitted to DESE.

7. Customized Elements

As stated above, student enrollment tends to be fairly standardized given state and district regulations. Schools do have flexibility in how they structure family and community outreach and input (e.g., family council planning sessions, number of information sessions held, number of home visits, etc.). This guide provides best practices documented to date.

8. Lessons Learned

Each section of the network guide provides an overview/lessons learned by subtopic. It is essential to review these given the complexities/regulations involved with student enrollment and the lottery.

Part II: Network Guide Timeframe for Launch Year

District: Boston

<p>July/August /September</p>	<p>Activity: Prepare first draft of student enrollment policy for charter application. This includes a draft of the application that will be submitted to students/families.</p> <p>Deadline: Charter application deadline.</p>
<p>October</p>	<p>Activity: Once BPS School Committee announces re-start/votes on re-start:</p> <ul style="list-style-type: none"> • Request/receive re-start roster from BPS • Plan for/hold introductory information session • First application backpacking • First phone-a-thon outreach • Start to reach out to community partners • Advertise in newspapers, at FRCs, etc. <p>Deadline: ASAP</p>
<p>November/ December</p>	<p>Activity: Student Recruitment</p> <ul style="list-style-type: none"> • Hold additional information sessions (2-3) before winter break • Second/third application mailing/backpacking • Engage in continuous phone outreach <p>Deadline: Winter Break</p>
<p>January/ February</p>	<p>Activity: Student Recruitment/Community Partner Outreach</p> <ul style="list-style-type: none"> • Hold more information sessions • Engage in continuous phone outreach • Start reaching out to community partners • Begin targeted home visits • Targeted application mailing/backpacking <p>Deadline: End of February</p>
<p>March/April</p>	<p>Activity: Student Recruitment and Lottery 1</p> <ul style="list-style-type: none"> • Continue to hold information sessions • Continue to reach out to community partners; start solidifying relationships/plans for SY • Targeted application mailing/backpacking • Targeted home visits/phone calls

	<ul style="list-style-type: none"> • Lottery prep • Lottery execution • Lottery Follow-up • Waitlist Management • ITE collection • Targeted outreach for ITE collection • Communicate ITE results to BPS <p>Deadline: Lottery 1 by end of March/ITE collection 2 weeks after lottery or ongoing depending on student enrollment policy submitted to DESE</p>
May/June	<p>Activity: Student Enrollment and Community Partnerships</p> <ul style="list-style-type: none"> • Ongoing ITE collection • Hold additional lotteries (if applicable) • Continue to reach out to community partners; solidify relationships/plans for SY • Ongoing waitlist management • Update BPS on ITEs • Targeted home visits for families; especially for families with students with IEPs <p>Deadline: Ongoing</p>
July	<p>Activity: Student Enrollment and Community Partnerships</p> <ul style="list-style-type: none"> • Ongoing ITE collection • Hold additional lotteries (if applicable) • Finalize community partners/afterschool schedule • Ongoing waitlist management • Update BPS on ITEs • Targeted home visits for families; especially for families with students with IEPs <p>Deadline: Ongoing</p>
August	<p>Activity: Student Enrollment; Community Partnerships; Family Orientation</p> <ul style="list-style-type: none"> • Ongoing ITE collection • Hold additional lotteries (if applicable – potential for final “sweep” lottery to capture any leftover applications) • Ongoing waitlist management • Update BPS on ITEs • Targeted home visits for families; especially for families with students with IEPs • Family Orientation

	Deadline: Ongoing/before school starts
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Part III: Network Guide

Mission

UP Education Network schools will ensure its students acquire the knowledge, skills, and strength of character necessary to succeed on the path to college and achieve their full potential.

UP Education Network schools are committed to engaging in equitable student recruitment and meaningful family and community outreach.

What We Believe

We believe that it is essential to recruit and re-enroll the majority of students in the school that is being re-started.

We believe that effective family and community engagement is the bedrock of successful school turnaround.

Overview

- **Student enrollment and family and community outreach is a critical piece of a Horace Mann Charter School’s pre-launch year.** It takes a great deal of work, time, and thoughtful messaging to families, the community, and other external stakeholders.
- **In the pre-launch year, it is the school’s priority – mandated by law – to recruit and re-enroll students from the school that is being restarted.** A majority of the outreach effort should be aimed at the existing (and eligible) student population. UP Education Network typically aims to get over 90% of currently enrolled students to submit applications for the lottery.
- **Horace Mann Charter Schools are required to enroll students through a lottery process.** In the pre-launch year (i.e., enrollment for year 1), students currently enrolled in the school that is slated to be re-started are guaranteed a seat if they submit an application. School teams will typically spend the bulk of the fall and winter leading up to the first lottery collecting applications from families at the school that is being re-started. After the first lottery, school teams will shift gears to

collecting intent to enroll (ITEs) from families. BPS requires that families submit ITEs in order to formally enroll with a school. Note: When families sign and return the ITE they forego any of their other BPS school options and commit to attending UP Academy.

- **Many families need “hand-holding” to complete their paperwork, especially families of students who currently attend the school that is being re-started in the pre-launch year.** Mailings should include a calendar of key dates, processes, etc. to help set expectations
- **Home visits are a critical part of outreach** and tend to be the highest contributors to helping to re-enroll families from the school being restarted in the pre-launch year.
- **However, the school launch team should also actively advertise/recruit within the community for additional spots** and/or grades in which the current school does not currently have existing and eligible students (e.g., incoming K1, incoming 6th graders in a 6-8, etc.).
- **Student enrollment and family and community outreach in year one and beyond will look very different than in the pre-launch year.** School leaders should be proactive by sending mailings to eligible students within BPS, attending charter school showcases, and working with FRCs across the District to recruit students.

Communication

Backpack Communication

Essential questions

- When should I backpack versus mailing?
- How do I make sure the backpack gets distributed in time?
- What if the current school refuses to let me backpack?

Lessons learned

- Backpacking information is an essential component of family communication when you:
 - (Pre-launch) Need to communicate with students prior to receiving official contact information from the District;
 - Want to supplement a mailing (i.e., try to capture any students whose snail mail information is incorrect, especially relevant for applications);
 - Want to send a flier/reminder for an event;
 - (Pre-launch) Need to send general information (i.e., not personalized as it would be a burden to teachers to have to distribute personalized information in a backpack mailing).

- (Pre-launch) Be respectful of a school's time and try to organize your asks as much as possible (i.e., provide a timeline of future backpackings).
- (Pre-launch) Give a school ample lead time to distribute the backpacking in order to ensure that it is distributed when you need it.
- (Pre-launch) To date, schools have been willing to accommodate backpacking requests; however, in the case that a school refuses to backpack, the school launch team should plan to use alternate modes of communication (i.e., mailings, flyer distribution at dismissal (with school's permission), et.al.).

Backpacking timeline

- Depends on item being backpacked:
 - For event flyers, no more than 1 week in advance;
 - For applications, on a rolling basis or prior to the application deadline (duplicate applications should be avoided as much as possible, so school launch teams should refrain from backpacking at the end of the application cycle as families are likely to be confused).

Mailings

Essential questions

- What kind of mailings should I send out?
- How do I put together a mailing?

Lessons learned

- **Try to minimize one-off mailings.**
 - Be thoughtful; mailings are a lot of work. Try to group mailings/information in as few big mailings as possible. This will also help to avoid family mail fatigue – if you over-mail, families are less likely to read important information.
- **Plan for the lead time that it takes to write/obtain English versions of letters and forms, and then get them translated.** Remember to consider the following question: *what is going to make the stuffing and the completion of this mailing easiest?*
 - Note: Sometimes formatting is disrupted on translated documents; build in time to edit formatting after you receive translated versions.
 - Tip: Using front and back translations help simplify the letter stuffing process by reducing the number of items that need to be printed/folded/stuffed.
- **Streamline the letter stuffing/labeling process.** Be thoughtful about how you sort your mail merge (e.g., sorted labels should match sorted letters, etc.).

- **Diction and messaging are important.** For many families, a mailing may be the first time they hear about UP Academy. This will not only shape their understanding, but it can also serve to clarify or confuse.
 - For the first couple of mailings, plan for potential time for BPS to review and potentially approve any notifications or letters to families. Work with the UP Chief of Staff to coordinate District approval. In addition, plan for time for UP Education Network Leadership Team, including Chief Administrative Officer and Chief Operating Officer, to review letters.
 - Ask UP Education Network leadership to push BPS in terms of making sure families know their school is closing (i.e., ensure that they let us message that information CLEARLY).
- **Always keep in mind backup methods of notification** for families that don't submit their address on applications when sending out notification of seat (post-lottery mailings).
- **In Year 1 and beyond, liaise with BPS for large mailings across the District. Please see the below section titled “Basics” for more information.** The District will help with the stuffing of envelopes and labeling when sending mailings to BPS students (particularly when you are engaging in student recruitment efforts).

Mailing timeline

- **Pre-launch**
 - Introduction letter (2-3 days after the school restart is announced)
 - Applications (Note: BPS may not let you send the application until after the School Committee vote)
 - Note: Number of mailings will vary, but school teams should plan on 4-6 application mailings – this does not include backpacking.
 - Information Session Fliers (no more than 1 week before event)
 - Note: Number of information session mailings will vary depending on the number of information sessions held. UP Academy Dorchester committed to at least 10 information sessions between November and February.
 - Notification of Seat (Post-Lottery: will depend on enrollment policy, but typically no more than 2 days after the lottery has taken place)
- **Year 1 and Beyond**
 - Invitation to apply (with application): start as early as November and continue to send up to the lottery date (e.g., BPS students, SPED PAC, etc.)

Basics

- Call Cesar Depaz at (617) 635-9075 the day before dropping off a mailing at BPS to ask him what the deadline is for sending the letters out that day. He will ask how many pieces you want to mail.
- BPS's mail room is located at 26 Court Street, Boston (State Street T station). Hours: M-F 9am-4pm

Types of mailings (Pre-launch)

Introduction letter announcing first info session

- Description: First introduction to school and push to invite to information session. School leaders should plan to hold this information session within a few weeks of the BPS school committee announcement/vote.
- Tip: Don't forget to confirm the location of the information session prior to the mailing!

Info sessions

- Description: Flier or letter with table announcing all upcoming information sessions/topics.
- Tip: Don't forget to confirm the location of all of the information sessions prior to the mailing to avoid a second location update mailing!

Lottery

- Description: Flier or letter announcing the lottery (location, details, etc). Note: The lottery must be advertised/announced 1 week in advance. In addition to sending out/distributing fliers, you can announce this on the school's website and in a newspaper. You can also send an autodial to let families know.
- Tip: Make sure to note that attendance is not mandatory and include language about existing school students being guaranteed a seat.

Enrollment (Application) and Post-Lottery (Intent to Enroll - ITE)

- Description: Letter to push families to return applications/ITEs by appropriate deadlines
 - Everyone is getting the same information
 - For the first application/ITE mailing include return envelopes
 - Also include a timeline of all things that will happen
 - Don't forget to include the most important part: the application and/or ITE!
- Description: Confirmation mailing
 - Includes differentiated messages; lets families know that the school received their application
 - Note: Potentially use these mailings to invite families to other events

- Description: Pre-lottery mailing and invitation
 - Use mail merge to put together a postcard that will confirm key information on application received and lottery invitation (i.e., name of student, grade applying for, priority status, address, phone number, etc.)
- Description: Post-lottery mailings
 - These letters let families know what happened at the lottery (Note: These have to go out within 2 days of lottery - per the school's enrollment policy). There are 2 kinds of post-lottery mailings:
 - Waitlist notification
 - Offer of seat (send with ITE and return envelopes)

Post-enrollment

- Description: First mailing enrolled students receive during the summer before school starts. This mailing should include:
 - Uniform and calendar
 - Afterschool information
 - Information about state benefits
 - Summary of family outreach to that point
- Description: Second summer mailing with additional information. This could include:
 - Other information you need from families
- Description: Third and potentially last summer mailing. This will likely include:
 - Family orientation invitation and additional information
 - The school LT could also choose to include some select policies that they want families to have, but given the size of mailings, it is best to save these for in person dissemination.

Other ad-hoc mailings

- Description: Other mailings as needed. Could include mailings about Family Council Meetings, updates on work to be done over the summer, etc. School launch teams should try to minimize these one-off mailings and instead use the above-listed mailings to include this additional information.

Mailing logistics

- Text Translation: All mailing should be translated. School leaders tend to rely on the fee service of One-Hour Translation. For smaller translations, school leaders should seek out staff with bilingual skills within the organization.
- Using the BPS Mailroom
 - Contact Cesar Depaz at (617) 635-9075
 - Cesar runs the BPS mailroom on Court Street. He will be your primary contact for mailings.

- If you provide addressed envelopes, BPS will pay postage
- Make sure to call Cesar the day before the mailing to ask:
 - What is BPS's real deadline for getting this out today?
 - Note: Because BPS gets reduced postage, it likely means a 1 day delay for all mailings.
- Other tips:
 - (Pre-launch) Don't forget to reserve space in the UP Education Network office on days when you are working on a mailing. You will need to spread out.
 - It might be easier to consider purchasing a rubber stamp of your return address instead of using return labels.
 - Make sure to order supplies 3-5 days in advance of needing them and if in pre-launch year, coordinate the purchase with the UP Senior Office Coordinator (Sara Lewis).
 - Use temps for mailings of more than 100 recipients.
 - (Pre-launch) Contact the UP Senior Office Coordinator (Sara Lewis) for temps (PSG staffing).
 - (Year 1 and beyond) Coordinate with BPS for large mailings – they will help with letter stuffing, labels, postage, and mailing.
 - Contact Cesar Depaz at (617) 635-9075
 - Don't forget to coordinate the mail drop off—large mailings are heavy.
 - Note: From printing letters to translation to letter stuffing, a mailing for 600 students could take 3-5 days (depends on number of documents in the mailing).

Phone Outreach

Essential questions

- What is acceptable to communicate by autodial?
- What needs to be communicated with a “real-person” on the other end?
- How should I think about tracking phone calls?
- Do I need a script for phone outreach volunteers?

Lessons learned

- **Most phone outreach related to student enrollment will take place in the pre-launch year.** However, the Ops team should be prepared to answer calls and return messages once mailings and applications have been distributed.
- **Be purposeful about phone outreach as it is time consuming!**
- (Pre-launch) **BPS has up to (3) guardians on file for every student with accompanying phone numbers;** push to get as much complete information from BPS from the start.

- **Phone number and other contact information is often outdated; tracking after the fact is challenging.**
 - Define roles and responsibilities: who is in charge of tracking this information?

Phone outreach timeline (Pre-launch)

- First big phone outreach (shortly after school is announced; at the start of application collection)
- Second outreach (as application deadline approaches/targeting select families – applications not yet received)
- Autodials (before big events/push for applications)
- Phone calls (as needed)

Basics and general phone line management (Pre-launch)

- Set-up a Google voice number prior to the official announcement of the school.
 - School leaders should reach out to UP IT to set-up the number and account.
- Google voice makes it easy to direct calls to different people.
 - Note: The Google voice number is what you publicize.
- Set-up email notification for Google voice.
- Set-up phone plan (weekly calendar for call backs) – one person owns on Monday, another on Tuesday, etc. Everyone gets email, but certain people are responsible.
- Record a voice mail in both Spanish and English.
- Tip: Think beyond the ops team for phone line management (i.e., Principal, DCIs, others).

Protocol for call tracking (Pre-launch)

- Set-up a [Google Doc](#) (see supporting documents for hard copy example).
- Tracking is most useful when doing a mass outreach effort (i.e., when trying to collect information, particularly during the first big outreach effort).
 - Ask callers to be mindful to update phone numbers, addresses, and other contact information.
- Brainstorm useful categories for the tracker (i.e., does a family not like home visits; follow-ups for questions that require another level of expertise, et.al.).

Autodials

- Autodials are an efficient way to blast general information out to families. They are typically used for:
 - Event reminders (lottery, meet & greet, etc.)

- Application deadline reminders (this can be targeted to families that have not yet submitted applications or ITEs)
- Note: When sending an autodial, please remember that many families will NOT listen to the message and will instead just call back. Make sure that someone is “manning” the general line for a few hours after the autodial has gone out.
- Tip: Autodial services typically provide information on how many people actually received the message.
- Logistics:
 - (Pre-launch) To date, our schools have used OneCallNow for autodials in the pre-launch year. This expense is covered by UP . School leaders should work with UP IT.
 - OneCallNow allows 45 seconds for each message
 - Tip: Make sure that the message is both in Spanish and English (within the 45 second message) – do not record two messages as you will have to send out two separate autodials, which will be confusing for families.
 - (Year 1 and beyond) BPS uses Blackboard as its autodial provider.

Script

- Description: It is important to write out the 45 second message and practice reciting it within that time limit. While OneCallNow allows you to re-do the message, it will save time if you are prepared in advance. Save this script for future use so you do not reinvent the wheel each time.

Phone-a-thons (Pre-launch)

- Phone-a-thons can be structured in one of two ways:
 - One Day: Structured time/event where participants meet, receive instructions, and make calls. This type of phone-a-thon is most useful when instructions are complicated and/or require a verbal description. This gives participants an opportunity to answer questions. It also helps to build momentum and could help make a lot of progress in one night.
 - One Week (or more): Participants are asked to complete x number of calls within x period of time. This type of phone-a-thon is the more common of the two. Requires solid instructions, scripts, and FAQs
- Tip: When doing a one-day phone-a-thon, think about asking for support outside of the school team and see how much you can do that day; you can then split the rest up among the school launch team.
- Logistics:

- Provide a schedule and call tracker; provide guide; provide food. Make sure there are enough places for volunteers to make calls.
- Tip: When using a Google Doc for tracking calls, make sure to let participants know that they should refrain from filtering in the Google Doc – it messes up the document when you have many people trying to edit with a filter on.

Script

- Description: It is important to put together a script/list of FAQs for phone outreach, especially when coordinating volunteers (i.e., people who may not know as much about the school).
- Script: See example of phone script/messaging guide.
 - Tip: Be as specific as you can about what you want people to achieve when they are making these calls.
- FAQs: See example of FAQs/messaging guide.
 - Tip: Think through your FAQs carefully; try to capture as much as possible so callers can answer questions.

Home Visits

Essential questions

- When is a home visit appropriate?
- How do I prepare for a home visit?

Lessons learned

- **In the pre-launch year, the school team should aim to make contact with every family prior to the first lottery (i.e., phone call, in-person, etc.).** Given the work involved, home visits should be prioritized for families that have not yet returned applications.
- **In the pre-launch year, school leaders will need to rely on broad volunteer support to conduct big home visit days (typically on a Saturday).** School leaders should work with the Director of School Operations to coordinate volunteer requests of UP Education Network staff. School leaders should also plan to reach out to a broader network of community contacts, other UP Academies, and family/friends. For smaller/targeted home visits, school leaders should work within the school leadership team for support.
- **While home visits are primarily used in the pre-launch year, schools may choose to conduct home visits for incoming grades** as well (e.g., 6th graders in a 6-8; K1 in a K1-8). However, it is important to highlight that these home visits in Year 1 and beyond will be significantly smaller in scope and will thus require less time and resources to be completed.

- **When possible, try to let families know in advance that the school is planning to conduct home visits on X date.** This can be accomplished through an auto dial or a letter, where the school lets families “opt out” of the visit by calling and letting the school know. Note: some families may not get the message and may express their displeasure at the visit. Ask volunteers to remain positive and respectful.
- **For families that seem taken aback, make sure that volunteers understand and relay why you are conducting home visits** (i.e., the school wants to make sure that everyone has the opportunity to learn more about what is happening at X School and that they have the opportunity to apply, but they are not obligated to do so).
- **Prepping for home visits is a time-consuming endeavor.** Make sure to budget 1-2 days for home visit prep. Specifically, putting together the maps and other volunteer materials takes a long time.
- **Conducting home visits is also time-consuming!** It will take volunteers about 3-5 hours for 20-25 houses (on average).

Home visit timeline

- (Pre-launch) Home visits can start as early as November, following the announcement by the District; in an ideal world school teams would start conducting home visits aimed at collecting applications at least two months before applications are due.
 - Note: In the case of Year 1 and beyond, home visits would not take place until the summer (following the lottery and submission of ITEs for applicable grades).
- (Pre-launch) School teams should plan to conduct a last round of home visits the weekend before applications are due (this is an opportunity to try to catch any last-minute applications from families).
- Establish purpose of home visits: Home visits can be conducted for a number of reasons. The following is a list of key home visits:
 - Introduce school/building relationships (following announcement of Charter – October/November)
 - Collect applications (starting in January)
 - Note: School teams should aim to get as many applications as they can from information sessions and calls first.
 - Collect ITEs (post-lottery, mid-March)
 - Post-ITE visits with families for students with IEPs (post-ITE collection, late spring, early summer)
 - Summer Home Visits (summer prior to school launch)

- Note: School teams should prioritize families that they haven't heard from to date.
- Summer Classroom Visits (August – during teacher orientation)
 - Families will be invited to their child's classroom to meet with teachers, staff.
 - Note: These visits to the school in the summer can take the place of some home visits for both pre-launch and year 1 and beyond.

Process for home visits

- Communicate with families in advance to let them know about the home visit (phone call, backpack or mailing communication)
 - Tips:
 - Typically, school teams have done all three.
 - Try to give families ample lead time; 1-2 weeks before the home visit is slated to take place.
- Coordinate the home visit day
 - Collect accurate contact information
 - Tip: Do not forget that a school team's best resource is the current school's staff. Make sure to coordinate with the school to double-check addresses and update stale contact information.
 - Send an email to request volunteers; encourage volunteers to reach out to their network – the more the merrier!
 - Tip: Finalize volunteers at least 3 days before the home visit (given map/route coordination; please see below for more information)
 - Create routes/maps on Google maps
 - Tip: Use BatchGeo.com
 - Service that can take a list of addresses and turn into KML document (that's the file you import into Google docs).
 - Color code by language (quick thing to see).
 - Assigning areas and routes is challenging.
 - Send an email with all relevant information the day before the home visit. Include rally point, relevant documents, information about food/water, etc.
 - Tip: Remind people to bring their smart phones!
 - Tip: Remember safety! Make sure to send volunteers in pairs and only conduct home visits during the day (daylight).
 - Prepare Materials for the Day
 - Translate all supporting documents for visits
 - Use OneHourTranslation.

- Bring something to identify volunteers with the school (i.e., pins that say UP Academy in the winter so that people can pin on their jackets; t-shirts with the schools logo in the summer)
- Print copies of handouts (General Info/Application/ITE/Swag/While you were out paper to leave if no one is there)
- Clipboard
- Pens
- Tape
- Measuring Success:
 - The team is successful when it makes contact and understands how the family feels about the school.
 - The team is very successful when families end the conversation feeling extremely excited about the school.
 - The team is most successful when the team manages to speak with and meet all families before the first day of school.

Information Sessions

Essential questions

- What is the purpose of an information session?
- How do I prepare for an information session?
- What do I do if families are angry?

Lessons learned

- **Make sure to clearly establish the purpose of the information session!** Generally, information sessions fall into three broad categories:
 - **Introduction Session:** This is typically the first introduction to the school, which is open to the community, families, and interested stakeholders.
 - **General Information Session:** This session also serves to introduce the school, but it is generally more geared at families, and goes into greater detail about the school (i.e., calendar, schedule, core values, etc.). This session is also open to the community.
 - (Pre-launch) **Family Council Planning Session/Family Input Sessions:** These sessions were first used at UP Academy Dorchester. They are meetings aimed at gathering input from families and other interested stakeholders (target audience is families). These can be structured as part presentation/part information gathering.
 - Tips:
 - UP Academy Dorchester picked four initial topics for these meetings, but they found that they most useful session was

- actually geared at hearing from families what topics they wanted to discuss over the course of the spring.
- Assign one staff member the role of note taker in order to follow up on parent concerns/questions/input.
 - **Information sessions can be contentious.** Make sure that all presenters review the messaging guide and make sure that everyone is prepared to engage in difficult conversations.
 - Tips:
 - If someone is derailing the conversation with questions or tangential topics, use people in the room to redirect (i.e., have one school leader approach that person and engage in the question as a side conversation).
 - Be aware that a diverse number of key stakeholders could appear at information sessions (i.e., politicians, community activists, et.al.). Make sure that staff is prepared to discuss a varying range of topics.
 - Make sure to have enough bodies at the session to help with room management (i.e., four at a minimum – two presenting and two working the room).
 - **The School LT does not have to present on all topics!** As the school builds out a scope and sequence for meetings, they should assign presenters based on expertise. The LT does not have to present on all these topics – farm some of these out to the experts!
 - Tip: Have at least one backup person for every specialized presentation in case if something comes up at the last minute and the person has to cancel!

Info session timeline

- Introduction Session (as soon as the school is announced)
- General Information Session (throughout the launch year, following the introduction session)
- Family Council Planning Session/Family Input Session (winter/spring of the launch year)

How to run an info session

Logistics

- (Pre-launch) Coordinate with the school or another organization to use their space for the session.
- Advertise the session via mailings, backpacking, and/or autodials. If in Year 1 and beyond, place fliers at the school.

- During the information session, make sure to assign 1-2 lead presenters and make the rest of the team floaters.
- Introduce the full team before starting the presentation.
- Leave plenty of time for questions.
- Information sessions generally run for one hour.
- Remember to be respectful of people's time and stay within the allotted hour.
- Leave the space clean after you have concluded the session.

UP office supplies (Pre-launch)

- Information sessions require quite a few materials! Please make sure to coordinate with the UP Senior Office Coordinator (Sara Lewis) to secure a number of these items. Kindly provide ample lead time (1 week) in case additional supplies need to be ordered to meet this request. Please see below for a list of items:
 - Pens
 - Sign-in sheet
 - Projector
 - Extension Cords
 - Projector Screen
 - UP Banner
 - Snacks/Water (if applicable)
 - Handouts (including translated documents)
 - Others as needed!

Translators

- Depending on the student population, school leaders should consider holding a handful of information sessions with translators. In Year 1 and beyond, schools may also ask bilingual/multilingual staff to provide translation assistance.

Lottery Preparation and Execution

Essential Questions

- How do I prepare for the lottery?
- How do I make sure there are no errors for the first lottery?
- How should I follow-up with families post-lottery?
- What is an ITE?

Lessons Learned

- **Getting the lottery right is critical; mistakes could lead to having to re-do the entire lottery, which would be bad for families and for the school's/UP Education Network's reputation.**
 - Checklists are the best way to ensure that important details are addressed at key moments of the lottery process - day before the lottery; before the lottery starts; day after lottery
 - A clear step-by-step schedule and a "lottery master" are critical to ensure smooth transitions amidst the hectic atmosphere.
 - It is imperative to identify any missing applications before the lottery starts; once the lottery starts and names are being called for a certain grade, you cannot add anyone to the lottery.
 - Mistakes in Priority assignments can be fixed ex-post.
- (Pre-launch) **The first lottery of the year is a very public event and must be carefully planned.**
 - ~80 families, the press and government representatives attended UP Academy Boston's first lottery. Families started arriving earlier than planned and a few data inaccuracies surfaced that required attention on the spot.
- **Lotteries in Year 1 and beyond still require quite a bit of work, organization, and planning, but they will generally tend to be smaller both in terms of number of applications and publicity.** The Ops team should follow many of the pre-launch year recommendations for processing applications and sending lottery reminders, as well as for day-of lottery set-up.
- **No matter how well you plan, something will go awry. Running through scenarios and protocols with the team beforehand is helpful but ultimately, it's important to be over-staffed the day of the lottery so that problems can be addressed as they arise.**
 - Here are a running list of things that may go wrong:
 - A parent may arrive an hour and half early
 - A family shows up who is not on the lottery roster
 - There may not be enough chairs
 - The name picker is too slow at reading names
 - We learn that a student has been put in the wrong grade and/ or has the wrong priority (e.g., commonwealth charters and private/ parochial schools are considered priority 4)
 - A parent gets upset and interrupts the lottery process
 - The computer will stop working /runs out of battery
 - Labels get stuck in the clear plastic bins or where they shouldn't be

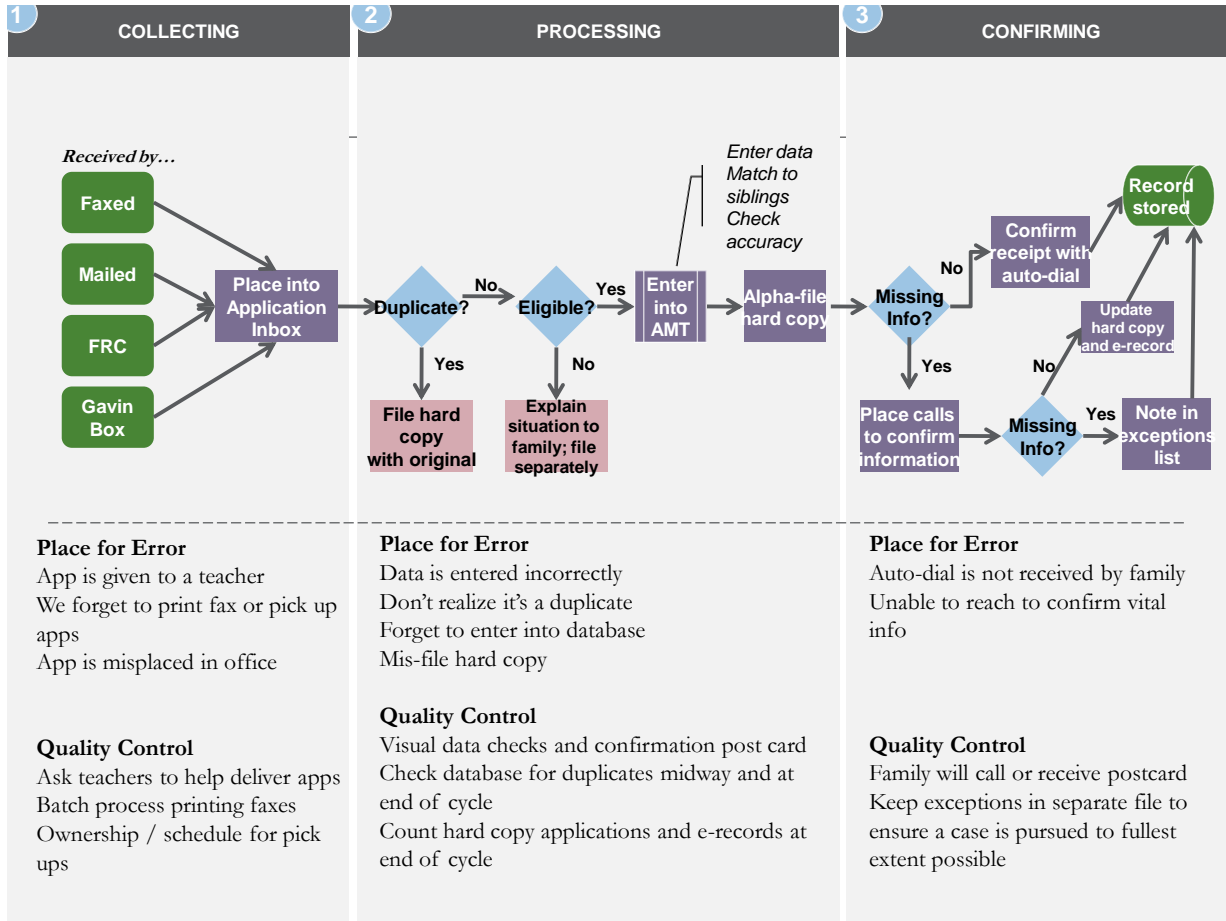
- School property is damaged by kids playing outside of the lottery space
- **Collecting applications can get messy; it is imperative to maintain an orderly process in order to avoid losing/misplacing applications.**
 - Block off specific time/ create clear, consistent procedures (to avoid errors) to process applications (early in recruitment season and after any big recruitment mailing, 100s of apps would come in at the same time; very time consuming and sometimes overwhelming).
 - Add a reminder to visit all locations (PO Box, FRCs and box at the school) the day of the lottery deadline date to ensure all applications are processed.
 - Create a system for collecting/tracking applications that come in via fax (i.e., check my fax weekly; save applications in Dropbox folder; print applications; use excel tracker). This will help when you are ticking and tying before the lottery.

Lottery prep and execution timeline

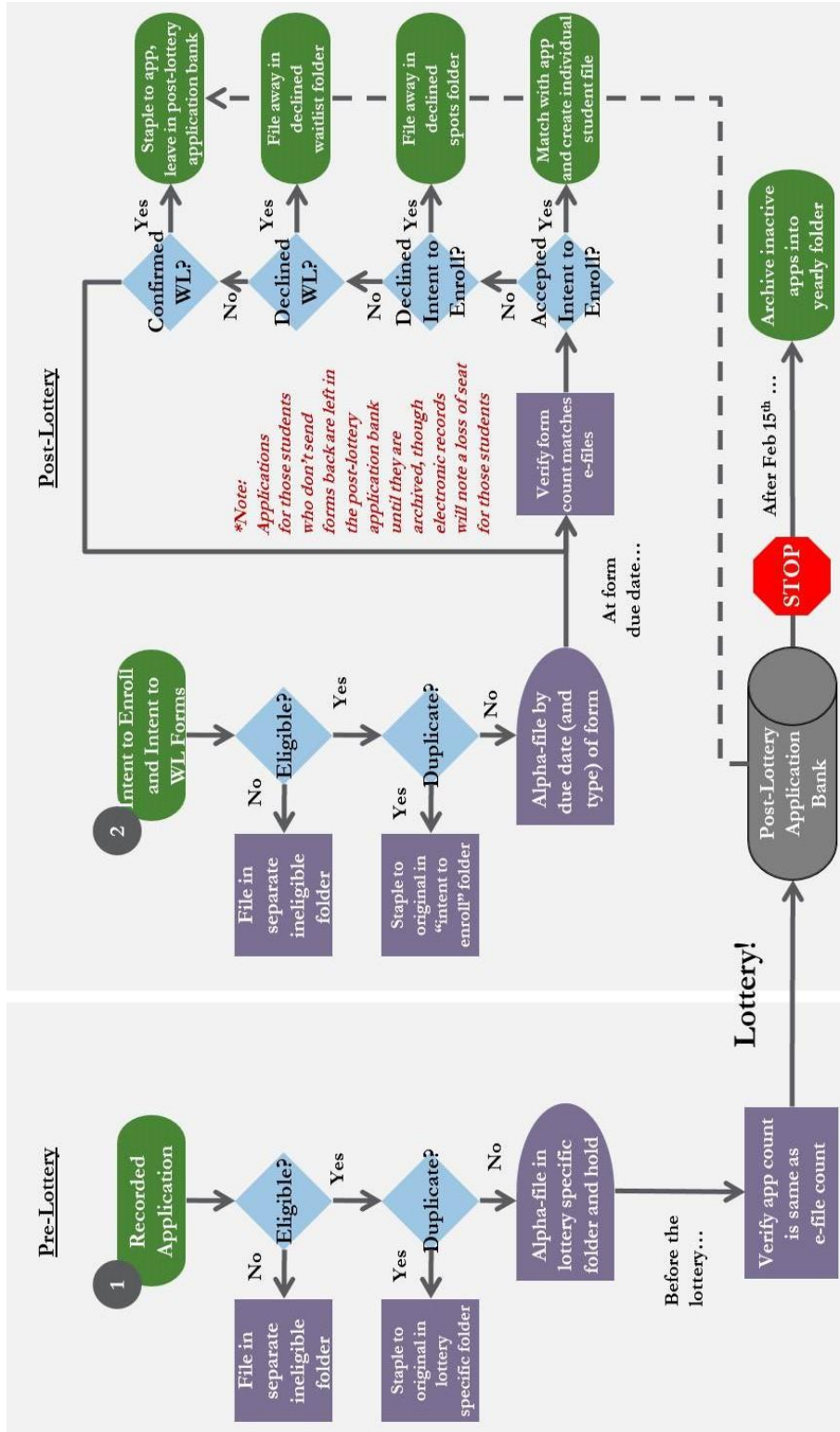
Ongoing

- Process applications and conduct confirmation calls (please see below for sample process)

Application Intake Process



The Life of an Admissions Student Record



T-minus 4 weeks until the lottery

- Select and publicize date and location (i.e., send autodial; publish in the local papers; publish with BPS, etc.)
 - Note: All Commonwealth Charters and UP schools agree to hold their first lottery on the same date (e.g., typically the 2nd or 3rd Wednesday in March, but subject to change). All other lotteries (2nd, 3rd, etc are determined by the school without connecting with other Commonwealth Charters)
- Select lottery picker and translators (as needed)
 - For large lotteries, two (2) lottery pickers are necessary.
 - DESE requires that lotteries be public events and that lottery pickers be unbiased (i.e., cannot be an UP Academy staff member or an UP staff member; can be friends or family or any other unaffiliated parties).

T-minus 2 weeks...

- Update step-by-step agenda and talking points (please see below and the appendix for more examples)
- Assign roles and review schedule and talking points with team (i.e., who's the floater, computer recorder, hand recorder, greeter, etc.)

Step-by-Step Schedule Template

Time	Person 1	Person 2	Person 3	Person 4	Person 5	Name Picker
4:30 PM		Set Up Lead				
4:45 PM		Set Up Lead				
5:00 PM	Set Up	Set Up Lead	Set Up	Set Up Lead	Set Up	
5:15 PM	Set Up	Set Up Lead	Set Up	Set Up Lead	Set Up	
5:30 PM	Set Up	JC/SQ Check-In	Welcome Families / Video Set Up	JC/SQ Check-In	Set Up	
5:45 PM	Floater	Welcome Families	Welcome Families	Orient Name Picker	Floater	Orient Name Picker
6:00 PM	Computer Recorder	Floater	Written Recorder	Lottery Master	Label Sticker	Pick Names
6:15 PM	Computer Recorder	Floater	Written Recorder	Lottery Master	Label Sticker	Pick Names
6:30 PM	Clean Up	Questions	Clean up	Clean Up Lead	Clean up	
6:45 PM	Clean Up	Clean Up	Clean Up	Clean Up Lead	Clean Up	

Note: The first lottery will require translators, 2 name pickers, 2-3 staff to address parents, and more time for the lottery (1.5 hours for 6th grade lottery)

Time	Step
6:00	<p>Jean asks everyone to take their seats.</p> <p>Jean welcomes guests, introduces herself, Nicole, Shalimar, Amy, Natalya, and Melissa Goff.</p> <p>Jean expresses appreciation for the attendees' and applicants' interest in our school.</p>

	<p>Jean passes to Nicole.</p>	
6:05	<p>Nicole talks about UP Academy:</p> <ul style="list-style-type: none"> o Located in current Gavin Middle School at 215 Dorchester Street o Principal will be Amanda Gardner, former principal of Boston Prep, highest performing charter school o Key components: Tuition-free, College prep, Extended school day / year, High academic expectations, Safe, orderly learning environment, Supports for all learners, Supportive disciplinary system <p>Nicole passes back to Jean</p>	
6:10	<p>Jean communicates lottery rules</p> <ul style="list-style-type: none"> o Third lottery. We held our first lottery on March 9, and second lottery on April 6. o We have 54 (check) applicants for lottery #3. All applicants in tonight's lottery will be drawn in a specific order based on their priority status. o We will be following state regulations in conducting tonight's lottery, including in determining where each applicant is placed on our waitlist. o All applicants will go on the waitlist. We anticipate some movement on our waitlist, but have no way of predicting what will happen. o Please do not interrupt the lottery. Raise your hand if you have a question and someone on the staff will come answer. There also will be time for questions after the lottery. o Turn off mobile devices 	
6:15	<p>Jean announces start of 6th grade lottery. NOTE: All yellow to be updated after June 3rd enrollment deadline.</p> <p>Jean announces we received 1 application from Abdugani Abdullahi a sibling of a Gavin student who receives priority and has been marked on the board</p> <p>Jean announces lottery for 5 rising 6th grade students in BPS schools and places priority #3 grade 6 tickets into the fishbowl</p> <p>Jean announces lottery for 5 rising 6th grade students in Non-BPS schools and places priority #4 grade 6 tickets into the fishbowl</p> <p>Jean announces start of 7th grade lottery</p> <p>Jean announces lottery for 2 rising 7th graders who are Gavin siblings and places priority #2 grade 7 tickets into the fishbowl</p> <p>Jean announces lottery for 6 rising 7th grade students in BPS schools and places priority #3 grade 7 tickets into the fishbowl</p> <p>Jean announces lottery for 7 rising 7th grade students in Non-BPS schools and places priority #4 grade 7 tickets into the fishbowl</p> <p>Jean announces start of 8th grade lottery</p> <p>Jean announces we received 1 application from Ngan Tran a Gavin student who receives priority and has been marked on the board</p> <p>Jean announces lottery for 3 rising 8th grade students in BPS schools and places priority #3 grade 8 tickets into the fishbowl</p> <p>Jean announces we received 1 application from Miren Chenevert, a non-BPS schools student who has been marked off on the board</p> <p>Jean announces conclusion of lottery and invites audience to come up and ask questions.</p>	<p><i>.Meanwhile...</i></p> <p>Melissa draws and announces names</p> <p>Nicole sticks labels onto board</p> <p>Natalya and Amy record</p> <p>Guest records video</p> <p>Shalimar floats to answer questions</p>

Sample Lottery Guidelines/Talking Points

Overview

- Thank you for your attendance and interest in UP Academy. The lottery should last 2-4 hours.

- We will be conducting the lottery in the following order: (1) 6th grade (2) 7th grade (3) 8th grade.
- *Priority.* Please note that UP Academy's enrollment policy is compliant with State charter school law (M.G.L.c.71, s.89) and states the following order of preference in the lottery this year:
 1. Any student actually enrolled in the Gavin Middle School (Gavin)* on the date that the UP Academy charter application was filed with the Massachusetts Board of Education
 2. Siblings of students actually enrolled in the Gavin*
 3. Other students enrolled in the Boston Public Schools
 4. Other students who are residents of Boston, Massachusetts
- *Sibling Preference.* After tonight's lottery: If a student in any grade is selected in tonight's lottery, then any of their siblings on any waiting list will receive sibling preference and be moved up to the top of that waitlist, but behind any other applicants who have already received sibling preference.
- Within a week of the lottery, a letter confirming your seat at UP Academy or your waitlist status will be mailed to you and will require your immediate reply. After tonight, we will only share the results of the lottery by mail. We will not share any information regarding your student's status in person or by phone.

Policies

- Please turn off the ringers to your cell phones and electronic devices.
- In order to proceed in a timely manner and eliminate confusion, we will not take questions regarding a student's placement until the end of the lottery.
- Do not interrupt the lottery process. If you need to have a conversation, please step into the lobby.
- Any attempt to tamper with lottery results may result in a student's loss of a seat at UP Academy.

* Throughout this document, Students referred to as being enrolled at the Gavin are defined as those students who were enrolled at the Gavin on November 8th, 2010, the date the charter application was filed with the Massachusetts Board of Education.

- While some students will be selected for a spot at UP Academy tonight, others will not. We ask that you be respectful of the lottery process and other families in the room in your reactions to lottery results.

6th Grade Lottery

- The 6th grade lottery will be conducted first. There are currently 149 seats available in our 6th grade class.
- Applicants will be selected until 149 spots are filled. The remaining names will be drawn for the waitlist.
- The 6th grade lottery will be conducted as follows:
 1. Siblings of those students enrolled at the Gavin* will automatically receive a space. We have already marked off spots for siblings of Gavin* students.
 2. Boston Public Schools (BPS) students will then be selected.
 3. Applicants from Boston who are not enrolled in BPS will then be selected.

FIVE-MINUTE BREAK

- You may approach the lottery table but it is important that you remain behind the marked line.
- We will not be taking questions at this time. Please hold all questions until the end of the lottery.

7th Grade Lottery

- The 7th grade lottery will be conducted next.
- There are currently 163 seats available for the 7th grade class; however, all seats have been taken by current 6th grade students enrolled in the Gavin*
- The 7th grade lottery will be conducted as follows:
 1. Students enrolled at the Gavin* and 7th grade applicants who are siblings of students at the Gavin* will automatically receive a space. We have already marked off spots for those students.
 2. Boston Public Schools (BPS) students will then be selected.
 3. Applicants from Boston who are not enrolled in BPS will then be selected.

8th Grade Lottery

- The 8th grade lottery will be conducted last.

- There are currently 141 seats available for the 8th grade class; however, all seats have been taken by current 7th grade students enrolled in the Gavin*.
- The 8th grade lottery will be conducted as follows:
 1. Students enrolled at the Gavin* will automatically receive a space. We have already marked off spots for those students.
 2. 8th grade applicants who are siblings of students at the Gavin* will be selected for the waitlist.
 3. Boston Public Schools (BPS) students will then be selected.
 4. Applicants from Boston who are not enrolled in BPS will then be selected.

T-minus 1 week...

- Conduct application Quality Control (QC) check
 - Make sure you have an accurate count by grade of all applications received.
 - Check for faxed applications; call the FRCs; send an email to make sure no one is holding on to any applications in their bags.
 - Print out all faxed applications so you have a paper copy of all applications. Get rid of duplicates so you have an accurate count of your paper applications.
 - Include in the count an "exceptions" pile (i.e., applications where you are not sure of the grade, etc.), but keep an exceptions log or file so you know where the exceptions are and work to resolve the exceptions.
 - Make sure the count you have by grade of all applications received (i.e., paper copies) matches exactly the count you have in your database. A sample of the Excel database used during the prelaunch year is saved in Dropbox. Match it by total first (i.e., count all applications by paper and make sure this count matches what is in our database), then by grade, then by priority level. All numbers have to "tic and tie". You should track these counts on paper or on a board where you can show for each grade and by priority the number of applications you have in the paper count, in your data base, the number of labels printed, the number of labels on the bins, the number of spaces on the foam boards, etc. so you can visibly see that all the numbers match.
 - Note: QC is time consuming! Make sure to start QC 2-3 days before the lottery. If new applications trickle in, you can always add them.
 - Make sure you have the correct Priority level for each student. Priority 1, 3, 4 can be confirmed by using MyBPS – BPS will provide

access to this tool. Priority 2 can be confirmed by cross-checking listed addresses for siblings or by following up with families in the case where there is uncertainty. You can always change priorities after the fact if you find that there is a mistake. Priorities are:

- Priority 1: Currently enrolled (eligible) students at the school that is being restarted. These students are guaranteed a seat if they submit their application.
 - Priority 2: Siblings of currently enrolled (eligible) students at the school that is being restarted.
 - Priority 3: BPS students.
 - Priority 4: Non-BPS students.
- Determine number of available seats
 - Seats are, in part, determined by the number of students at the school that is slated to be re-started; the charter application/cap; the budget; optimal class size; and schedule. The LT should plan to discuss whether they plan to announce that there are additional seats being considered outside of the current student population that is guaranteed a seat. You can always take students off the waitlist at a later date. School leaders should be conservative in what they tell families the day of the lottery.
 - Prepare Excel lottery file for computer trackers
 - Prepare poster boards
 - For Priority 1 applicants, you can pre-stick labels on the board. This will help save A LOT of time during the lottery.
 - Print and organize labels for every student
 - Make sure the count you have by grade and by priority in the database matches your labels printed. In other words, make sure the mail merge worked and all labels were printed.
 - Make sure all labels printed make their way into the bins. These should be physically counted after printing to triple check the numbers match up for each grade. The bins should be clear plastic. Note: This is to ensure that no label is left behind.
 - Make sure the numbers are right on the foam boards - ie, make sure the number of applications you have by grade matches the number on the foam boards.
 - Note: the way that we conduct the lottery is that we pull by grade level, not priority. That means that each foam board (or set of boards) will be divided by grade. As names get called, those labels get stuck on those boards. This is helpful because if the day after the lottery we notice that a priority was incorrect, we can change it without having to re-do the lottery.
 - Pack for the lottery with the Packing Checklist (see below)
 - Prepare results envelopes for mailing

Day of Lottery

- Prior to leaving for the lottery, recount the labels in each bin, and make sure that number matches the number of spaces on the foam boards, and also matches

the number of paper applications you have by grade and number of applications in your database. Again, make sure all numbers tic and tie.

- Order food for staff and water for lottery pickers
- Walk translators and lottery pickers through responsibilities
- Set up a check-in table, chairs and lottery area
- Pick up the audio system (for large lotteries only)
- Make sure that the video equipment is fully charged and enough recording time is ready

Lottery Process Checklists

Time: Next Business Day After Application Deadline

<input type="checkbox"/>	All applications are picked up from all three FRCs, school drop-off box, and PO Box and printed from the fax line – both school fax and UP fax line (double check both fax records for the last three months)
<input type="checkbox"/>	All applicant families have received confirmation (if applicable)
<input type="checkbox"/>	All application changes are noted in student hard copy records
<input type="checkbox"/>	All situations for students in the exceptions file are resolved
<input type="checkbox"/>	All ineligible students are notified via phone call
<input type="checkbox"/>	All duplicates have been removed from electronic tracker and filed away
<input type="checkbox"/>	All siblings sets are either matched in electronic tracker or removed from the database
<input type="checkbox"/>	All X School <u>students</u> are placed in priority bucket #1 (i.e., student eligible for Priority 1)
<input type="checkbox"/>	All <u>siblings</u> of X School students are placed in priority bucket #2
<input type="checkbox"/>	All BPS students are placed in priority bucket #3
<input type="checkbox"/>	All students in commonwealth charter and private/ parochial schools are placed into priority bucket #4
<input type="checkbox"/>	All hard copy applications are entered into the electronic tracker and the subtotals by priority tie
<input type="checkbox"/>	All key info relevant to priority status in tracker matches hard copy apps (Grade, School, Sibling)
<input type="checkbox"/>	Ensure numbers in lottery extract match the Application Tracker
<input type="checkbox"/>	Count to make sure the total number of paper applications matches the total number of applications in database

Time: Before Lottery Begins

<input type="checkbox"/>	Orient name picker to his/her responsibilities and have him/her practice a quick reading pace
<input type="checkbox"/>	Go over the talking points and order with speakers
<input type="checkbox"/>	Load electronic lottery tracker onto computer and ensure computer is plugged in with power
<input type="checkbox"/>	Check each clear plastic bin to make sure no labels have been left out
<input type="checkbox"/>	Wait to start lottery until all families have been checked in and their information

	confirmed
<input type="checkbox"/>	Place a trash can by the easels so that label backings can be thrown out
<input type="checkbox"/>	Check that camera is recording the lottery
<input type="checkbox"/>	Assign someone to watch the door and let late parents in, if appropriate
<input type="checkbox"/>	Place signs leading families to the lottery room "UP Academy Lottery this way..."

Time: Post-Lottery Wrap Up

<input type="checkbox"/>	Poster board results tie with written results and computer results
<input type="checkbox"/>	All students whose siblings gained admission are moved up in priority
<input type="checkbox"/>	All students should be sorted by order of priority.
<input type="checkbox"/>	All address changes and other requests from lottery night are noted and resolved
<input type="checkbox"/>	All students' e-records in the lottery extract are moved to the Student Enrollment Tracker

Lottery Packing Checklist

<input type="checkbox"/>	Poster boards and easels
<input type="checkbox"/>	Excel lottery results recorder (saved locally on the computer that will be recording results)
<input type="checkbox"/>	Lottery labels, prepped with color coding by priority and packed by grade
<input type="checkbox"/>	Extra blank lottery labels
<input type="checkbox"/>	Sound system
<input type="checkbox"/>	Video equipment
<input type="checkbox"/>	Family Lottery Guidelines (for the first lottery)
<input type="checkbox"/>	Step by Step schedules
<input type="checkbox"/>	Brochures
<input type="checkbox"/>	Extra intent to Enroll and waitlist confirmation forms
<input type="checkbox"/>	Rosters for students in the lottery
<input type="checkbox"/>	Paper for recording of lottery results
<input type="checkbox"/>	Pens/ pencils
<input type="checkbox"/>	Paper copies of applications
<input type="checkbox"/>	Fishbowl
<input type="checkbox"/>	School table cloths
<input type="checkbox"/>	For a large lottery, UP Academy t-shirts for staff
<input type="checkbox"/>	"UP Academy Lottery this way" signs

Intent to Enroll (ITE)

After the lottery, the school has 48 hours to send families the results of the lottery – whether they received a seat or were placed on the waitlist and paperwork requesting the family to respond with their interest in enrolling (**Intent to Enroll form**) or in accepting a waitlist spot (**Waitlist Confirmation form**) for UP Academy. Letters have not communicated specific waitlist numbers though families are allowed to request this information by phone after the results have been mailed.

Intent to Enroll and Waitlist Confirmation Forms have been translated into the following languages: English, Spanish, Cape Verdean Creole, Haitian Creole, Chinese, Vietnamese.

Each results mailing should include:

- 1) A letter explaining the results on the lottery and next steps
- 2) A form requesting the family to respond to the offer of a waitlist or of admission
- 3) A pre-addressed, stamped #9 envelope to the school so families can easily mail back the forms
- 4) An invitation to an open house (*optional*)
- 5) A #10 envelope addressed to the family, in which to insert all the above

It's a time saver to prepare the pre-addressed envelopes, print/fold (Kinkos!) the different letters and put a return label on the #10 envelopes before the lottery takes place. After the lottery, print address labels in order (e.g., Admitted/English; Admitted/Vietnamese... Waitlisted/English...). Work through each admitted/language group at a time, labeling and stuffing all the appropriate contents into the #10 envelope.

Families are given 2-3 weeks to respond with forms. A number of letters come back as returned mail, in which case we connect with those families to get updated contact information, re-send the paperwork and give them additional time to complete their forms.

Working with...

Currently Operating School (Pre-launch)

Essential questions

- How should I interact with the school that we are slated to restart?

Lessons learned

- **Display a high degree of generosity of spirit and understanding when interacting with staff from the school that is slated to be restarted.** Individuals are dealing

with a range of emotions and school launch staff should display a high degree of sensitivity when making requests of the school.

- **Make sure to set-up a box at the school where families, teachers, administrators can drop off applications and/or ITEs.** In an ideal world this box is placed visibly, in or near the front office (high traffic area). A member of the school launch team should plan to empty out the box and follow the application collection/filing protocol on a weekly basis.

Relationship building

- Engage in meaningful relationship building with current staff. Ask if you can attend school site council meetings; meet with community groups and afterschool/service providers; and generally be proactive with school staff.

BPS and the City of Boston

Essential questions

- How and when do I need to interact with Boston Public Schools as it relates to enrollment?

Lessons learned

- **Boston Public Schools has a separate school assignment process, which can create confusion for families applying to UP Academy.** UP Academy has worked with the School Assignment Office (Jerry Burrell and Evelyn Adario) to ensure students are being assigned to the school they prefer and BPS and UP are not sending contradictory communications.
- **Coordinating with the BPS assignment process is important to ensure clear messages are sent to families and BPS records who officially is enrolled at UP**
 - BPS's Round 1 of school assignments tends to happen concurrently with our lottery process.
 - BPS assigns students on the UP Roster to UP Academy Charter School of X for us in the MyBPS systems.

Timeline of interaction with BPS and City of Boston

BPS Assignment Schedule

Round	Students Assigned	Registration Period	Assignments Sent Home
Round 1	Rising K, 6 th and 9 th graders	January	Mid-march
Round 2	K-12	February and March	Early May
Round 3	K-12	April and May	Mid June
Round 4	K-12	May and June	Early July

Description of deliverables owed to BPS/Boston

- (Pre-launch) November/December: Estimated enrollment figures (you will work with the Director of School Operations and the UP Education Network Finance Team to come up with this number).

- (Pre-launch) January/February: Regular updates to Jerry and Evelyn on applications received from current school students (Priority 1).
- (Every year) March (post-lottery): Send Excel file to Jerry and Evelyn with all students that were offered seats.
- (Every year) Late-March (post-ITE collection): Excel file to Jerry and Evelyn with all students that signed ITEs.
 - Send this information on a rolling basis for any students that submit late ITEs, depending on what the school agreed to in its enrollment policy.
- (Every year) April/May/June/July: Continued updates to Jerry and Evelyn after additional lotteries are held.

BPS Enrollment Contact List

Jerry Burrell, Director of Enrollment Planning & Support
Email: [jburrell \(@bostonpublicschools.org\)](mailto:jburrell@bostonpublicschools.org)
Office Telephone: 617-635-9517; Fax: 617-635-9307

Evelyn Adario, Assistant Director of Enrollment Planning & Support
Email: [eadario \(@boston.k12.ma.us\)](mailto:eadario@boston.k12.ma.us)
Office Telephone: 617-635-9516; Fax: 617-635-9307

Community Partners

Essential questions

- What are the different kinds of community partners?
- How do I reach out to organizations that have never heard of UP Education Network?

Lessons learned

- **Connect community outreach to school launch goals.** Ask yourself: what do we want to get out of this outreach? Define these goals by the type of community partner.
- **Don't forget to identify and reach out to the current school's partners!** Reach out to families and the community to learn more about this partner and collect feedback as you decide whether you want to continue this partnership.
- **Think about community outreach in broad terms.** Ask yourself: who might help me learn more about families and the community? Who might be able to help us if we need space for meetings?

Timeline of interaction with the community partners

- As soon as the school is announced, the school team should start meeting with existing and potential community partners.

- Note: Consult with UP 's Chief Administrative Officer prior to contacting potential partners, as some outreach might be politically sensitive.
- For Year 1 and beyond, outreach should be ongoing.

List of types of partners

- Neighborhood Coalitions
- Providers
 - Afterschool
 - Enrichment
 - Family needs (i.e., therapy, social services, family counseling, etc.)
- Politicians/Advocacy Groups
- Foundations
- Community Centers
- Organizations/Agencies that might serve organizational needs
- BPS FRCs
- Exploring grants for good/services with private companies, etc.

Volunteer Groups (Boston Cares, etc.)

- Note: Tommy Chan (Senior Coordinator of Facilities) coordinates Boston Cares outreach.