Organization Description

B.4 Management & Operation

Governance and Management:

Corporate Board
The Paideia Academy of Chandler, Inc. is the corporate entity, created to hold the charter for The Paideia Academy of Chandler. Beth Mendonca and Robert C. Winsor II (Brian) are the two corporate principals in charge of the corporation.

Governing Board
The Corporate Board has created an executive committee to serve as the Governing Body (Governing Board), whose role will be the policy making body for the school. At the start-up, the Governing Board will have 3 members. More governing Board members will be added as the school grows. At start-up, Brian Winsor, Beth Mendonca and Lisa Lacy (community member) will serve on the Governing Board for the school. Beth Mendonca is the President of the Governing Board.

Management and Operations

Executive Director: The Executive Director is an oversight position, created by the corporate board. The Executive Director will oversee and monitor the implementation of the program of education and the business operation to ensure the successful start-up of operations. Brian Winsor will be the Executive Director at start-up. This position will be re-evaluated after the three-year start-up period.

Principal: The day-to-day operation of the school will be performed by the Principal, who is selected and appointed by the Corporate Board. The Corporate Board performs annual evaluations of the Principal. The Principal reports directly to the Governing Board of the school. The Principal is in charge of the instructional leadership and personnel at the school.

Primary responsibilities

The Principal reports directly to the Governing Board and is responsible for the management, supervision and operation of the Academy in compliance with the educational, financial and other operational laws and procedures while adhering to the principles of the Academy's mission and vision. The specific duties and responsibilities of the Principal include, but are not limited to, the following:

Human Resources

- Perform all supervisory activities including hiring, training, evaluation, discipline, and termination of Academy personnel.
- Observe the operation of classrooms and provide assistance to teachers and students in achieving educational goals.
- Maintain personnel files.
- Administer and enforce the Personnel Manual.

Curriculum and Instruction

- Supervise the educational program and provide curriculum and instructional leadership.
- On-going improvement of teaching for all staff through lesson observations, regular use of data, collaborative planning, and mentoring/coaching opportunities.

- Demonstrate skill and knowledge in designing, implementing, and evaluating major programs and activities to bring about needed change and higher performance.
- Apply sound principles of classical education in developing instructional programs that are of high quality for all students.
- Demonstrate depth of knowledge in Core Knowledge and Great Books and in the latest instructional methodology.
- Have knowledge of and be able to retrieve, analyze, and sort data in order to make instructional decisions to improve student achievement.
- Coordinate program evaluation and ensure compliance with all local, state and federal programs at the Academy.
- Develop and maintain Master Calendar and Schedule.
- Assist teachers in the covenant process of the Academy.

School Culture and Behavior

- Supervise the safety and welfare of students.
- Direct disaster preparedness and safety information programs.
- Academy policies and administrative regulations pertaining to student discipline.
- Coordinate and participate in the process of recommending students for support programs (i.e., special education, and Title I, child study team).
- Create and maintain a culture that establishes high expectations for student achievement and behavior.
- Maintain student handbook.

School/Community Relations

- Establish and maintain good school-community relations.
- Demonstrate effective oral and written skills in communicating with students, staff, community, and Board members in a timely, clear, and appropriate manner.
- Serve as educational advisor to parents
- Use diversified approaches and processes to involve others in generating solutions, predicting consequences and setting priorities.
- Maintain and expand Academy relationships and partnerships.
- Give monthly Academy tours.
- Complete bi-annual parent satisfaction surveys.
- Oversee the school admissions process ensuring compliance with the state charter law and charter contract.

Finance and Business Management

- Maintain and submit reports as required, in a timely manner.
- Prepare and manage budget of Academy with assistance from Board Treasurer.
- Manage all Academy grants.
- Maintain functional knowledge and understanding of the Academy's budget and general financial standing.
- Manage/oversee the handling of food program, facilities, student data management, information technologies, other contracted services.

Critical skills or experience required

Experience and Knowledge Expectations:

- **Curriculum:** Possess a thorough knowledge and understanding of the Core Knowledge Sequence and Classical Education curriculum.
- **Instruction:** At least 3 years teaching experience in grades K-8; demonstrated leadership abilities at the elementary level.
- **Personnel management:** Experience managing, mentoring, and evaluating staff while demonstrating strong leadership and empowering teamwork.

- **Assessment**: Experience creating formative and summative assessments that guide the data-driven decision making process.
- **Board Relationships**: Two years experience working on or with a Board of Directors or equivalent or related experience.
- **Legal Management:** Ability to understand and follow complex legislation or related experience.
- **Compliance Management:** History of ensuring that contractual and legal obligations have been met, or related experience.
- **Financial Management**: Ability to manage complex budgets; understanding of financial and accounting statements or related experience.
- **Authorizer relationships**: Experience working with non-profit authorizer or other similar parent-company type systems.
- **Human Resources:** Ability to continuously improve organizational structure and compensation/benefits program, or related experience.
- **Community Relationships**: Experience working with parents and the public.
- **Effective communications**: Excellent oral and written communication and presentation skills.
- **Education:** Master's degree required with a concentration in elementary education, curriculum or administration.

Business Manager: The Business Manager will be in charge of the financial management of the school. He/She will maintain solid financial and accounting principles and will ensure the fiscal strength of the school. The Business Manager shall uphold the best business practices. The Business Manager is a contracted position, part of the Management Contract. The Paideia Academy will sign a management contract, to include business, administrative and other services for the organization. The Business Manager reports to the Governing Board of the school.

Primary responsibilities

Manage and coordinate all financial aspects of the school including:

- Maintaining all school finances on QuickBooks Pro
- Complete Payroll
- Receive all invoices to be paid
- Cut checks and online payments, pay bills
- Maintain all house accounts with respect to teacher's accounts, field trips, etc.
- Update, maintain, and review budgets regularly

Reporting - Ensure that all required financial reporting is completed

- Quarterly Reports to the Arizona Department of Economic Security, for unemployment contributions.
- Annual Budget as adopted by the Board of Directors, submitted to the Arizona Department of Education.
- Complete and submit all payroll taxes, federal & state.
- Complete and submit all quarterly tax reports, federal & state.
- Complete employee W-2s, W-3s. W-4s, etc.

Audit - Ensure compliance with applicable laws for all administrative activities.

- Review all ADE reports
- Review all AZ Learns/AYP (NCLB) Reports
- Organize and complete Annual Audits and submit to ADE
- Verify accurate documentation & storage of all information
- Ensure the proper storage of school records.

Human Resources - Assist administration in the completion of human resource initiatives.

- Maintain employee benefit programs - health, dental, vision, etc.

- Maintain perspective employees files, including resumes.
- Complete all fingerprinting and fingerprinting reports and submissions.
- Track staff absences
- Maintain all employee personnel files

Other

- Assist in all business matters relating to the fiscal strength of the school
- Assist in legal matters as needed

Critical skills or experience required

- BS in Business, Accounting or Finance
- At least 3 years experience in operations, finance and/or human resources
- Excellent computer skills, including Microsoft Office, Word, Excel and Access
- Experience working in an urban school setting
- Previous charter school experience, a plus
- Demonstrated success in monitoring budgets of at least in excess of $1 million and in managing contracts of at least $ 50,000
- Has the ability to manage multiple tasks and meet tight deadlines
- Demonstrated commitment to the school vision and mission
- Rigorous approach to problem-solving—collecting all relevant information, consulting diverse perspectives and creating feedback systems
- Recognition of self as a learner, able to identify areas for growth and commitment to working in these areas
- Experience and zeal for working in an entrepreneurial environment
- Excellent interpersonal and communication skills
- Passion for creating a school community that supports the development and achievement of all students, particularly those underserved and at risk in other school settings
- Attention to detail coupled with the ability to think and act strategically

The Paideia Academy of Chandler will have a distinctive three-tier governance and management structure – a corporate board, governing body, and management. The main distinction between the Corporate Principals and the Governing Body relates to their functions. The corporate principals maintain the ultimate control of the corporate organization and set up the mission and vision of the organization, while the governing body establishes policies and procedures that reflect the mission and vision of the organization. Subsequently, the school management implements the policies set up by the Governing Board.

The table below shows the distinction between the mission/vision setting, policymaking process and the executive process, respectively between Corporate, Governing and School Management. This chart describes the roles and responsibilities of the corporate board, governing board and the charter school management in critical areas.

Responsibility	Corporate Board	Governing Board	Executive Management
Legal	• Maintains legal status; insures the proper paperwork is submitted to the corporation commission • Adopt, amend, or repeal the bylaws; • Serves on education-related committees; • Amends the charter; • Selects location	• Exercises fiduciary role to ensure that the charter school is properly managed. The board should have a mechanism to validate information from the administrator. • Reviews financial and business dealings and exercises proper judgment in self-dealing transactions -- avoidance of conflicts of interest.	• Provides information to the board to demonstrate that the charter school is well managed. • Compiles information for annual filing requirements. • Signals to the board if either of the situations is likely to occur.
Finance and Accounting	• Adjusts the annual operating budget (if necessary)	• Approves annual budget. • Reviews periodic financial reports (balance sheet, income statement, changes in financial position). • Ensures that proper internal controls are in place.	• Prepares annual budget with input from staff and finance committee • Oversees preparation of periodic financial reports. • Implements proper financial controls.
Planning	• Establishes the mission and vision of the school • Develops and adopts the strategic plan • Reviews strategic plan and progress. • Updates the strategic plan	• Establishes program direction for the charter school aligned with the mission and vision and approves goals and objectives designed to achieve those ends. • Assesses compliance/progress in achieving educational and other outcomes agreed to in the charter contract. • Assesses program evaluation plan.	• Participates in establishing mission and program direction for the charter school. Contributes to vision of the charter school; and assists the board in maintaining focus and momentum for the charter school • Develops specific program goals and objectives based on the board specific mission. • Develops reports or oversees staff development of reports to demonstrate program progress.
Policy	• Develops the curriculum, • Sets the general class size and student-teacher ratio;	• Develops and adopts written policies • Responsible for reviewing policies periodically	• Identifies need for new policies • Responsible for assuring the implementation of policies and for assisting the board in analyzing policy options
Personnel	• Approves personnel policies • Selects, hires and evaluates the Principal • Change in executive personnel, including the Principal.	• Follows the personnel policies, establishes procedures.	• Implements personnel policies. • Recommends changes in personnel policies to the board. • Hires all personnel and evaluates performance of staff members (or delegates to appropriate supervisor).

Responsibility	Corporate Board	Governing Board	Executive Management
Resource Development	• Approving annual giving and special capital fundraising campaigns; • Develops grants, and other funding applications, plans fund-raising events, enters into business ventures to support mission.	• Responsible for assuring long-range commitments of resources; establishes a fund development plan and participates in its implementation. • Reviews and approves all major grant proposals.	• Conducts research and maintain information database. • Assists in fund development efforts. • Manages grant projects in accordance to project guidelines
Board Accountability	• Fills vacancies on the Board or any committee; • Establishes and communicates clear expectations of Board directorship	• Assures effective participation of Board members	• Facilitates training and information exchange for members in preparation for selection of Board members • Facilitates effective communication among Board members
Decision-making	• Defines and communicates the role of Board, administrator in making decisions • Serves on education-related committees	• Assures appropriate involvement of board members in charter school decision making	• Makes action decisions within parameters set by the board, collaborates both with the other staff and Board in some decisions
Community Relations	• Promotes the charter school to parents and the general public, including serving as an emissary of the charter school to the broader community. • Promotes cooperative action with other charter schools including activities and occasions when the charter school should take part in coalitions, shared programs, joint action, etc.	• In collaboration with the Corporate Board promotes the charter school to parents and the general public, including serving as an emissary of the charter school to the broader community. • In collaboration with the Corporate Board promotes cooperative action with other charter schools including activities and occasions when the charter school should take part in coalitions, shared programs, joint action, etc.	• Interprets the mission of the charter school to the community through direct involvement, public relations programs, including personal contact, descriptive program literature, and work with the media; works closely with the board for an effective division of labor.
Contracts	• Approves major financial commitments	• Approves contracts	• Manages contracts

Table adapted from: *Building and Managing an Effective Board of Directors, Center for Nonprofit Management in Southern California*

The Paideia Academy of Chandler – Management and Operations – Coordinated Duties

Duty	Principal	*Office Manager	Administrative Assistant/Registrar	Business Manager	** R&D/ Development/Sponsored Projects Director
Personnel: Administration	Train, supervise, review administration	Assistant to Principal: non-curricular	Assistant to Office Manager	Enroll staff in payroll and benefits	External Resources Development: Fundraising campaign Tax credit drive Giving database: coordinate with Office Manager and Business Manager Letters, media, Web page
Personnel: Instruction	Train, supervise, review teachers Staff performance files, renewal, promotion	Student records SAIS reporting, required ADE reports, database	First contact: phone, mail, walk-ins Daily attendance record and posting	Payroll and Benefits, IRS Audit SAIS and all required ADE reports prepared by the Office Manager	
Personnel: Recruitment	Recruitment, selection and hiring	Event ceremony planning	File paid invoices	Maintain assets, records, balance sheets	
Academic Accountability: Curriculum and Standards	Curriculum integrity, implementation, Common Core and State Academic Standards	State (AZ LEARNS) and federal (NCLB) compliance	Family contact database	Weekly expenditures and deposits	Public addresses in support of the school mission
Internal Controls	Monthly and annual status reports to the Board of Directors	Property management	Lost student books, locker assignments	Audit accounts and bookkeeping	PR support to Principal Weekly report to Principal/ Monthly report to Board of Directors
Finances	Final administrative approval on budgets, salaries Dispute resolution History/Trends/Paideia Education	Maintain long-term records for audits Fingerprinting Manager parent volunteers	Basic service repair calls, contacts	Audit collection of all fees, donations Trends in school finance	External Resources Development: Trends in fundraising, R&D and federal, state, private/foundation
Handbooks	Write, maintain Faculty and Student/Family Handbooks	Maintain school calendar, communications and updates	Distribute handouts, applications, brochures	Detailed accounting records, reconciliation on month/YTD	Organization Capacity Statement and Updates
Communication	Approve all school wide communication	Fees, donation, collection and database	Assists teachers with copier problems	Investigate financing options	External Resources Development: R&D/Project/Proposal Development
Discipline	Student Discipline Handbook, enforce campus climate	Crisis Management Plan, medical support	General first aid medical support	Audit contract bids for major yearly services	Alumni database Alumni contact
Parents	Parent Advisory Council, parent meetings, complaints	Student, family services	Student, family services	AFR, Budget, all ADE reports	
Enrollment	Orientation for new families	Tours, enrolls, enrollment lottery	Enrollment support	Monthly financials to Board of Directors	
Public Relations	All major PR publications, public speaking, school vision	PR support and general communication	Mailings	Property and liability insurance	Foundation contact Corporate contact Tank you letters and receipts: coordinates with the Office Manager and Business Manager

Table adapted from: *Charter Replication Application, Scottsdale College Preparatory, Arizona*

Note: The Principal is the administrator with the authority to discipline students, or direct teachers.

* These positions would be filled in subsequent years of operation of the school, as the student population grows.

** These functions would be performed by staff of Education Team Partners.