



Education Reform Toolkits:  
Resources to achieve results

# Opening New Schools

## A Checklist of Key Tasks

developed by Bain & Company for Rowe Elementary  
and hosted by



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## **I. What is this toolkit and who is it intended for?**

This checklist of key tasks required to launch a new school was developed by Bain & Company for Rowe Elementary school in Chicago. It is shared here so that school district and charter school leaders may build upon it as they launch their own new schools. The checklist should not be considered a comprehensive set of tasks appropriate for all circumstances, but rather a starting point and set of example tasks to be tailored to each new school's particular conditions.

Included in this toolkit are:

- A list of 375 key tasks and accompanying project management tools to track progress against them (Excel)
- Brief guidelines for effective use of the enclosed documents (below)
- Instructions for the project management features in the checklist (PowerPoint)
- The history of Bain's collaboration with Rowe Elementary School (PDF)

## II. How can I best use this tool?

Any group intending to launch a new school will already have a good idea of the work required to do so successfully. These materials may supplement that knowledge by:

- A) Serving as a set of *example tasks* against which leaders may compare their own to ensure comprehensiveness;
- B) *Providing a basic structure* that can be modified/supplemented to track progress against key tasks.

All of the existing tasks in the Excel document (*Column G*, entitled “Task/Activity”) are categorized according to the following criteria:

- **Design Area** – includes high-level topic areas such as mission, leadership, culture
- **Category** – includes specific work areas such as human resources, finance, accountability
- **Sub-category** – includes groups of tasks such as recruiting, budgeting, community building to be completed within those work areas
- **Owner** – the person responsible for accomplishing the task
- **Start Date, Due Date, Duration**

New school leaders can sort the tasks that Bain developed for Rowe Elementary according to their area of need. For example, if a new school leader in Springfield, Ill. wants to flesh out her own task list, wants to look at all the Rowe Elementary tasks associated with Rowe’s mission, she could use the Excel AutoFilter to select only “Mission” in the “Design Area” column. Alternatively, if she wants to see the entire list of tasks used for Rowe Elementary chronologically by due date, she can use the AutoFilter feature and select “Sort Ascending” for the “Date Due” column.

New school leaders can also modify the list of tasks included in the Excel file, supplementing it with additional tasks where appropriate and removing tasks that do not apply in their own situation. Once the task list has been updated, it can then be used as a project management tool for tracking progress and communications among members of their team.

*Please see attached PowerPoint as well as the “Instructions” tab in the Excel file for further guidance on how to use the project management and tracking features of this tool.*