

CHAPTER
5

Implementation or Expansion of Independent Study

An immediate concern when independent study is offered is to determine whether it will be offered as a mode of delivery of a school or as a program in a school. The determination will depend on local conditions. For example, considerations will vary with the size of the district, the extent of site enrollment, and the attitudes of concerned administrators and teachers toward their options within policy limits. However, independent study should be an optional instructional strategy within every school so that it is available when needed by any student (or group of students) for any of the purposes identified in *Education Code* Section 51745(a) (see Appendix A). This format would tend to be a “program” within a school.

A Mode of Delivery

Education Code Section 51748 requires that students in independent study enroll in a school of the district or county office rather than in a “program” of the district. If a district has previously offered the independent study strategy through a

program center that is not a school and that does not assure students of enrollment in a school, the district has two options: it can enroll students in independent study in its regular schools (which is apparently the legislative intent) reporting attendance and maintaining official records at those schools, or the district governing board can establish an alternative school

pursuant to *Education Code* Section 58500. The district or county may wish to provide only independent study or may wish to offer other instructional strategies as well. If a district or county does establish a new alternative school, steps should then be taken to obtain a CDS code number for the alternative school. Information about CDS numbers and the assignment of a new number may be obtained by contacting the California Department of Education; telephone (916) 327-4014.

Alternative schools have opportunities to innovate and operate under waivers (*Education Code* Section 58509), as needed, to achieve particular objectives that are pertinent to the school's all-volunteer student body and faculty. A disadvantage may be that creation of another school would create serious financial and logistical problems.

Depending on the district's or county office's decision-making rules and procedures, the responsible persons should probably establish one or more task groups to study the situation, assess needs, explore possibilities, including a visit to existing similar schools, consider carefully the pertinent information in this manual, and formulate alternative proposals for decision making. A number of good models are spread throughout the state.

B Needs Assessment

Before starting or expanding independent study, a school district or county office should determine its needs in relation to the instructional and service possibilities of independent study strategies. (Be sure to refer to the legal references to independent study in Appendix A when assessing needs.)

The following are some questions to answer when conducting a needs assessment:

1. What are the legal parameters under which independent study operates? Is there a process for periodic review of the legal mandates?
2. What is the target population that needs to be served (e.g., grade levels, special needs)?
3. How large is the population to be served?
4. What alternatives presently exist to serve this population?
5. What are the unmet needs of the target population?

6. What services are available without cost to the district to help establish independent study (e.g., facilities, staff, curriculum)?
7. How much money will be needed to start or expand independent study?
8. Who needs to be involved in the decision making about the implementation of this instructional strategy (e.g., community, school board, district personnel, school site staff, parents, students)?
9. How many and what kind of locations are needed to best serve this population?
10. How can this population best be served (e.g., one semester, one-year program, or continuous enrollment until graduation)?
11. Will the school district provide the money generated from the ADA to fund independent study adequately?
12. How will independent study and the students being served be evaluated?
13. Who can be designated to oversee the implementation of independent study?

C Informational Resources

1. Before setting up independent study, the district or county office should gather as much information as possible from successfully operating alternatives. This objective can be achieved by visiting several different schools that offer independent study and asking appropriate questions. A sample list of possible visitation questions appears at the end of the chapter.
2. If visitations are not possible, the school board may obtain the same information through phone or mail contact or participation in workshops at the state and regional levels given by successful managers. (Refer to Chapter 1 for forms of independent study.)
3. An important source of information about existing schools that offer independent study is the directory published by the California Consortium for Independent Study (CCIS), a professional association. New members receive a free membership list when they join. CCIS has divided the state into geographic regions. Each one has a regional

representative who is usually well informed about independent study and local alternatives. The basic contacts for CCIS are the elected officers of the association whose names and addresses can be obtained from the CCIS Executive Assistant at telephone and FAX (916) 683-6316. Information about existing options and how to locate them and names and contact information may be obtained from the Educational Options, Student Support, and American Indian Education Office, Coordinated Student Support Division, California Department of Education, 1430 N Street, Suite 6408, Sacramento, CA 95814-5601; telephone (916) 323-2183.

D School District and County Board Policy

1. Clear policy and procedures adopted by the governing board are necessary. The policy should be responsive to the mandate of the *Education Code* in order to be in compliance. The policy should provide the guidance for achieving program quality and maintaining standards of validity. Please refer to Chapter 2.
2. Policymaking is a group effort. As a first step to implementing independent study, the board of either the school district or the county must adopt written policies and procedures (see Appendix A, *Education Code* Section 51747; *California Code of Regulations, Title 5*, sections 11700–11703, inclusive). Before they can be adopted, the new regulations require a public hearing. A suggestion is that an advisory committee of teachers, students, and parents help the administration draft the district or county policy. This group could propose broad operational guidelines and serve to review and evaluate the policy.
3. If the school is a charter school, the requirements set forth in *Education Code* sections 51745 to 51749.3, inclusive, and the related provisions of the *California Code of Regulations, Title 5*, apply to it.
4. In writing board policy, the administration must make certain the legal requirements are met and address the operational factors. These include not only all grade levels (kindergarten through grade twelve) but also the kinds of programs, such as Gifted and Talented Education (GATE) and Adult Education, that are being planned for implementation in independent study, either immediately or at some future date. For example, enrollment might be limited initially to students in grades nine through twelve but might expand at some point to kindergarten through grade twelve. By submitting a proposal for kindergarten through grade twelve, the committee can eliminate the need to rewrite and resubmit a policy. Again, legal counsel may be helpful in wording policy statements. (Sample board policies are included at the end of Chapter 2 and are available from other sources, including the California School Boards Association [CSBA].)
5. Getting the policy adopted by the board requires planning and forethought. As the political or decision-making process differs a great deal from district to district and county to county (depending to a large extent on the size and the major socioeconomic characteristics of the area), be sure to determine the best approach to submitting the program proposal for adoption. An important factor in submitting a proposal is to ensure that all district or county guidelines for policymaking are adhered to and that no steps are bypassed.
6. Generate the full concept of what you hope to achieve by implementing independent study. Draft the policy following the district or county guidelines. Most districts and counties have a formal procedure for reviewing draft policy before it can be placed on the board's agenda for consideration. The draft policy is usually placed on the board's agenda with a one-paragraph synopsis and an attachment which includes the formal policy proposal. It is advisable that the persons responsible for the proposal attend the meeting and present an overview of what will be accomplished. If you sense a feeling of opposition among board members, urge parents, community members, and others who are positive about independent study to be there and to

speak to the board. Should the board give its approval, the proposal becomes a policy and is added to the administrative policy guide.

E Public Relations and Community Involvement

1. Public relations activities are essential, such as media stories reflecting successes of independent study students, special school events, or unique features of independent study. These activities should be focused to create positive awareness about independent study within the district and community.
2. Linkages with community service agencies are important to create because these groups can provide valuable supplemental services to independent study students.
3. Flyers or brochures may be developed to distribute to students, parents, district personnel, service agencies, and local businesses. The materials can discuss the following issues:
 - Independent study philosophy
 - Independent study sites, locations, and contact people
 - Target populations served
 - Assessment process
 - Referral policy
 - Waiting list policy, if applicable
 - Attendance requirements and possible ramifications
 - Learning activities
 - Grading policy
 - Courses offered
 - Promotion or graduation procedures
 - Removal or transfer procedures
 - Areas of responsibility for the district, teacher, parent(s), and student
 - Students' rights and responsibilities
4. Representatives from various groups can serve on the recommended independent study advisory committee. The committee should be actively involved in planning, developing, evaluating, and improving independent study and not be used to "rubber stamp" predetermined agenda items.

F School Name Selection

Districts should consider the possible negative impact of the name that appears on the diploma (e.g., _____ Alternative High School) for high school independent study. The name may affect students' future employment, career, or educational opportunities.

G Identification of Elementary-Level Students in a High School

In a unified school district, alternative independent study schools may begin as high schools, then add a kindergarten-through-grade-eight component. There are several ways in which the issue may be approached:

1. Label the school as an umbrella kindergarten-through-grade-twelve school that encompasses three or more constituent *schools within the school*: an elementary school, a middle school, a high school, and any other specialized or magnet school or program that might belong there organizationally. Graduating seniors would receive a high school diploma undistinguished from those of district comprehensive or continuation schools. Similarly, elementary-level people could refer to their school as an elementary school, and the same sort of label could apply at the middle school level. In some instances, such as for the listing in the *Public School Directory*, the school might be identified by name and level in the customary manner. In reports, as necessary, the enrollment and ADA would be sorted out and reported by category.
2. Label the schools at the various levels differently for the various pertinent functional purposes but give the school an official identity for necessary administrative purposes. Thus, although the secondary-level people might always identify themselves as the high school, the small print on documents might indicate that the alternative school is a branch or unit of (*name*) School.
3. Regardless of the school's functional address and assigned administrator and regardless of whether the location is different or the same, each school may officially be a separate entity with its own

CDS number if it meets state and local criteria for existence as a separate school. This is the situation in which the continuation high school and the high school offering independent study exist comfortably but separately on the same campus.

Apart from a unified school district, it would not be legal for a high school district to provide and enroll students in an elementary-level option or for an elementary school district to offer enrollment at the high-school level. An elementary school district is authorized to offer instruction through independent study only at the elementary level.

It is advisable to keep things simple and straightforward, avoiding situations that can yield errors. The recommended practice, if an alternative school is established in a unified district, is to use the kindergarten-through-grade-twelve school option with a single CDS number. The diplomas, as noted above, would still carry the high school name.

H Obtaining a CDS Number for a New School

If and when a new school is established, it will require a CDS (county-district-school) number. The recommended first step is obtaining information from the California Department of Education about the criteria used in assigning a CDS number. Such information is obtainable from the CDS Data Administrator, Education Technology and Information Management Division, Department of Education, telephone (916) 327-4014, FAX (916) 322-3257. Once the district makes a decision to establish a new school, it should apply to the Department for a CDS number. The number represents the school in formulae used for computing revenue and other entitlements and in preparing reports, so it must correctly represent what exists. A number assigned to a high school must not be used for an elementary school.

I Other Program Implementation Concerns

The following are a few other items that need to be addressed before implementing independent study:

1. *Insurance.* Generally, the district's insurance policies cover the building and its contents

against possible fire, theft, or vandalism. These policies also cover possible legal liabilities in case an independent study student is injured at the site. Be sure to contact the district's or county's insurance division or carrier to ascertain that students, staff, and on-site items are covered, especially if making use of community sites. (Students in Regional Occupational Program (ROP) and On-campus Work Experience (OWE) programs are covered by workers' compensation plans.)

Other insurance procedures to consider include:

- a. District or county forms that parents and staff who drive students in private automobiles must sign to indicate that drivers have adequate insurance coverage. These forms need to be on file for "regular" drivers and should be signed even in cases of emergency. For any field trips, these signed forms need to be on file before the event. (See Chapter 11 for sample forms.)
 - b. Personal property forms that must be filed to protect the personal property brought on campus for school use by students or staff.
 - c. Release forms that must be signed by a student and a parent, legal guardian, or caregiver if the student is a minor, when the student or his or her testimonial is used for publicity releases or audiovisual productions. These forms generally are provided by the agencies involved.
 - d. Appropriate insurance for off-site facilities (including donated sites). Contact district or county insurance carriers to verify adequate coverage.
2. *Telephones.* Accessibility to telephones is essential for the independent study staff. Students need to be able to call in to the site for help with work assignments or personal problems or to change their appointments. Staff members need to be able to contact nonattending students. Whatever phone procedures are established, it is important that they do not interfere with the teaching process.
 3. *Computers.* Computers can provide individualized computer-assisted instruction. They can also be used for office management, ADA reporting,

statistical information, and preparation of student transcripts.

4. *Learning Environment.* Although space in existing schools may be allocated to independent study, the learning environments for independent study will usually be different. Basic requirements include furnishings and equipment that facilitate effective teacher-student counseling and tutoring, clerical services, and mandated files. Other accommodations may provide for students studying with limited assistance, such as computer-equipped learning stations or self-operated audiovisual booths or stalls. Modifications may also need to be made in the home learning situations. Be sure to consider the following questions:
 - a. Have the student's style and structure of learning been identified so that the student and parent, guardian, or caregiver can try to accommodate those factors, including light, noise level, distractions (such as television and radio), suitable furniture, time management (to take advantage of the time periods in which the student is most alert and ready to learn), and others? (A child's learning style is not necessarily the same as the parent's, and what is good for the teacher may not be best for the student.)
 - b. Has the district or county office considered the possibility of cost-effective investments in appropriate technology?
 - c. Has the district considered student need and provisions for laboratory-based courses such as chemistry and courses with special conditions such as physical education in team sports? In many instances the most appropriate strategies facilitate accommodations such as enabling students' participation in regularly scheduled classes.
5. Has student access to services and experiences to which the student may be entitled been ensured? Access to district services, such as those of counselors, reading specialists, special resource teachers, and psychologists, and to extracurricular programs, such as athletics, drama, music organizations, student body activities, and special clubs, must also be considered. No student waives his or

her right to these because of participation in independent study. Barriers or unnecessary impediments may exist that must be removed.

J Budget Preparation

1. Consider and list your anticipated expenditures as follows:
 - a. Calculate and list all salaries in keeping with the instructional hours necessary to reach your goal. Estimate the fringe benefits (budget code 3000); your business office (payroll) can assist you with those expenses (workers' compensation, unemployment insurance, retirement, and so on). Remember that, for budget purposes, compliance items, such as student-teacher ratio (except for adult students), cannot exceed the ratio for all other educational programs (see Appendix A, *Education Code* Section 51747.6).
 - b. Determine administrative and classified salaries.
 - c. Determine and budget facility costs as well as insurance, maintenance, and other standard operating expenses before you budget for materials and services for running the educational program.
 - d. Examine the list of expenditures (object accounts) to see what items are necessary for "doing business." Place some monies in the general reserve or contingency accounts to take care of unforeseen future needs. Check the district policy for transferring from one account to another (budget codes 1000 to 6000).
2. Monitor your accounts at least monthly to determine whether your expenditures are in line with your ADA-generated revenue limit (your income).
3. Confer regularly with your supervisor, business office representative, and others to whom you are responsible for budget integrity.
4. Be open about your budget. Let appropriate staff be involved in preparing or monitoring the budget.

5. Anticipate cost increases, particularly with salaries, and budget accordingly.
6. Try to work with the principal, business officer, or other appropriate person to gain experience in budgeting.

The chart at the end of this chapter indicates budgetary categories by major budget code sections that pertain to a typical alternative. Each item is supplied with the kind of basic justifications or explanatory notes that may be needed and will assist in obtaining approval.

Sample Estimate

1. Revenue limit (district's revenue limit per student per year; this estimate uses \$3,000) times average daily attendance (ADA). If 30 students are enrolled in independent study but only have an average of 80 percent attendance, the ADA to use is 24 ADA (30 students \times 80% = 24 ADA):

$$\begin{array}{r}
 \$3,000 \text{ District revenue limit} \\
 \times 24 \text{ ADA} \\
 \hline
 \$72,000 \text{ Independent study revenue}
 \end{array}$$

2. Basic expenditures include:

a. Teacher salary (use appropriate amount)	\$36,000
b. Clerical support (example: 1/4 clerical)	<u>3,600</u>
	\$39,600
c. Fringe benefits (example: 15% \times \$39,600)	<u>5,940</u>
	\$45,540
d. District overhead (example: 10% \times \$45,540)	<u>4,554</u>
	\$50,094
e. Other costs (e.g., textbooks, instructional supplies, postage, staff development, mileage, memberships, telephone, repairs, and equipment) (example: Estimate \$150 per student: \$150 \times 30 students)	<u>\$ 4,500</u>

Total expenditures \$ 54,594

3. Income minus expenditures equals estimated amount available for additional purchases, improvements, staff, etc.

$$\$72,000 - \$54,594 = \$17,406$$

Remember, in developing an estimated budget, you will need to meet with your business office to (1) determine actual amounts to use in the budget; (2) ensure that all cost items are included; (3) determine that all expenditures comply with funding restrictions; and (4) ensure that the procedure actually used to calculate the budget estimate is correct for your district.

The work sheet that follows may be useful, with adjustments to make the figures applicable to the local situation, in assessing whether a particular

school is getting an appropriate share of the revenue it generates through ADA.

Estimating Your Budget

Below is a simple format that can be used to estimate the revenue that will be generated by independent study ADA. Your district's revenue limit, actual direct costs, and overhead will be different, so you will need to work with your business office to determine the correct amounts to use for your estimate. Variations in attendance will also affect your estimate. Even though revenue and costs vary by district, districts should still be able to generate adequate funding for independent study.

Budget Work Sheet			
Income			
A. Regular ADA	\$ _____	× _____	= _____
	Revenue limit	ADA	
B. Lottery funds	\$ _____	× _____	= _____
	Amount per ADA	ADA	
C. Other			= _____
	<i>Total income</i>		= _____
Expenses			
A. Teacher: Salaries _____			
	Benefits + _____		= _____
B. Clerical: Salaries _____			
	Benefits + _____		= _____
C. Building rental			= _____
D. District maintenance			= _____
E. Office supplies (\$ _____ × ADA)			= _____
F. Telephone (\$ _____ /month)			= _____
G. Capital outlay (_____ %)			= _____
H. District overhead (_____ %)			= _____
I. Student supplies (\$ _____ × ADA)			= _____
J. Conference/training			= _____
K. Other			= _____
			= _____
	<i>Total expenses</i>		= _____
Total income: _____			
Minus total expenses: _____			
Balance/deficit: _____			

K Location of Independent Study

Obtaining appropriate locations is an essential component of establishing independent study options. (Independent study might benefit from being

located close to public transportation and where the target population resides.) Investigate not only district or county sites but also community locations. Check insurance coverage if off-campus locations are

used. Districts should also monitor the implementation and implications of *Education Code* amendments regarding leased or relocatable buildings (see *Education Code* sections 17291, 17292, et seq.).

Under *Education Code* Section 17289, structures must meet new Field Act requirements (see Appendix A for the full text of this section). In summary, the section states that district and county offices may request exemptions from the Board of Control for a period of two years based on certain conditions:

- a. The building is not located on a regular school site.
- b. The building complies with all applicable local standards.
- c. The building is used for independent study.
- d. The building serves fewer than 25 pupils (kindergarten through grade twelve) at any one time.
- e. Use of the building is critical to providing an effective, alternative community-based program.
- f. Use of other buildings meeting seismic safety standards for schools is not practical.

Independent study may take many forms. It may be any of the following:

- a. A school within a school (SWAS)
- b. An integral part of the regular school program and constitute part of a student's school day
- c. A separate organization housed on a regular school site in portable units or unused classrooms
- d. An entity located on a regular, continuation, or adult education school site

Independent study can be housed satisfactorily in an off-site location. However, the district should consider the implications of the Field Act regarding earthquake safety (see *Education Code* Section 17289). Successful centers have been located in commercial property, close to where students may obtain work or community-based experiences. Other community locations include public libraries, storefronts, community centers, senior citizen centers, preschools, churches, civic center rooms, Employment Development Department offices, rental homes, apartment or condominium complexes, recreation centers, mental health facilities, Regional Occupa-

tional Program facilities, parks and recreation rooms, and business corporation rooms provided for employees enrolled in classes.

New legislation: AB 3397 (Chapter 795, Statutes of 1992) allows for the use of buildings which pass local safety inspections and provides more flexibility in leasing sites for programs for pregnant and parenting teens. This change, effected through *Education Code* Section 17293, was effective January 1, 1993. Sites must be recertified every five years. This legislation may be relevant to independent study for pregnant minors.

Students taking classes in community services often meet at community sites that relate to their curriculum. Sites include hospitals (health education), legal offices (youth and law), nursery schools (child development), community theaters (drama), and plant nurseries (life science). In Adopt-a-Student programs, mentor adults from the community meet with students in the mentor's work place and provide educational assistance.

L Staff Preparedness

1. When staffing independent study, the district or county office must consider student population characteristics, especially learning styles and needs, program size, facilities, budget, resources, and volunteers. (See Chapter 4 for specific guidelines on staffing.)
2. The greatest key to a successful opening day is the enthusiasm and preparedness of the staff. Persons answering the telephone or greeting visitors must be able to answer general questions about the school or refer persons to someone who can. Persons need to be trained to follow up on any referrals.
3. When many students come to independent study for the first time, they are nervous and lack self-confidence. The staff needs to recognize from opening day on that this is a risk-taking situation for many students. Therefore, the staff must work constantly to ensure an environment of learning in which the student can feel comfortable, safe, and supported. Often the students' successes stem from the trust-building process that begins on that first day.

California School Accounting Budget Categories

<i>Budget codes*</i>	<i>Possible categories (can be adapted for your district's needs)</i>	<i>Justification for expenses</i>
1000s	<ul style="list-style-type: none"> Teacher salaries, regular or extra assignments, substitutes School administrators' salaries 	<p>Includes substitutes</p> <p>Provide leadership at the site level for independent study</p>
2000s	<ul style="list-style-type: none"> Guidance/welfare/attendance 	Provide counseling services for program
	<ul style="list-style-type: none"> Instructional aides Clerical—including substitutes, temporary, part-time, and overtime Classified personnel salaries 	<p>Assist all certificated staff</p> <p>Secretary/clerical/registrar to program; provide added help as needed</p>
3000s	<ul style="list-style-type: none"> Benefits 	Per contract
4000s	<ul style="list-style-type: none"> Textbooks Workbooks and other supplementary materials to match individual instruction Classroom supplies, computer discs, individualized learning Office supplies 	<p>Provide students with textbooks closely matching their ability level</p> <p>Provide students with materials necessary to challenge their thinking ability</p> <p>Provide individual instruction to students</p>
5000s	<ul style="list-style-type: none"> Mileage for teachers' travel Provide registration fees for staff members to attend independent study state and local conferences Dues and memberships Miscellaneous contracts Printing: such as contract forms, assignments and independent study flyers Maintenance repairs 	<p>Independent study is taught in a variety of locations; WEE employer site visitations must be made for WEE students.</p> <p>Office equipment such as copy machine service and computers</p> <p>Communication and unit instruction</p> <p>For repairs as needed</p>
6000s	<ul style="list-style-type: none"> Computers, cassette players, typewriters, file cabinets, furniture, etc. Other possible needs (dependent on facilities): <ul style="list-style-type: none"> Telephone services Custodial Rental or lease/option to buy facilities Amount of indirect costs paid to the districts Other miscellaneous, depending on needs 	To meet needs of individual students; to maintain required WEE records

*Refer to *California School Accounting Manual* for codes and further clarification.

NOTE: The operating budget should be calculated after all district indirect costs are known and subtracted from total income.

Preparing for Opening

Below is a chart of possible activities which may ensure a good opening. Activities and responsibilities will vary according to needs.

<i>Item</i>	<i>Activities/Actions</i>
Publicity about opening day	Prepare releases to community; district in-service training, radio/TV, orientation tape, or slide show.
Furniture and supply orders	Organize teaching and office stations, order books and instructional and office supplies.
Facilities/Location	Establish security clearances for programs open after regular school hours on school campus locations. Arrange telephone services.
Staff/Staffing	Hire and train; hours/days/times. Schedule in-service training for staff on dealing with telephone services.
Enrolling and scheduling appointments	Schedule dates, places, and times. Confirm student appointments.
Printing	Print forms, contracts, teaching materials, tests.
Procedures	Refine procedures for office, recruitment, enrollment, student follow-up.
Support services	Contact support services to be ready to accept independent study students as clients.
Files	Organize office filing system (see Chapter 8). Have teaching staff organize student folders that could include assignments, attendance, emergency card information, testing results, books owed, transcript analyses, and other relevant educational history information.
Open house	Provide "Coffee and Cake" opening for the district and community to view the program. This can be before, during, or after opening day. Send invitations to prospective visitors.
Welcoming students	Have students bring past/present pictures about self for the bulletin board. Student is invited to bring family and friends to see program.
Program evaluation	Plan for program evaluation. See Chapter 13 for specific guidelines.

Implementation Checklist

The following is a checklist that may be used when implementing Independent Study to make certain that all necessary steps are taken and to help give a comprehensive picture of the process.

1. Preplanning

- Identify needs by assessment.
- Plan visitations.
- Develop board policy.
- Submit and obtain board policy.
- Select program types/populations.
- Initiate public relations, publicity.
- Select name.
- Initiate preliminary budget.
- Provide for staffing.
- Select location(s).

2. Organize for Implementation Planning

- Initiate Implementation Planning Committee.
- Establish the committee's planning tasks.
- Assign responsibilities for tasks.
- Establish deadlines for completion of planning tasks.

3. Finalize Scope and Time Lines

- Establish preliminary cash flow.
- Identify alternatives to be offered.
- Select campus(es) to be served and locations.
- Define/select methods of instruction.
- Plan curriculum materials acquisition/adaptation/development.
- Select auxiliary services to be offered.

4. Establish Organizational Structure/Functions

- Identify and schedule site functions.
- Assign functions by management level.
- Assign functions by position.
- Set up staffing schedule.
- Modify existing job descriptions and create new job descriptions (if desired).

5. Identify Facility, Equipment, Materials, and Requirements

6. Staff the Sites

7. Implementation

- Create master schedule for implementation.
- Assign implementation responsibilities.
- Provide guidance for completion of implementation tasks.
- Prepare final budget.
- Create independent study master agreements/forms.
- Provide recruitment/retrieval (if appropriate).
- Establish enrollment procedures.
- Establish record files system.
- Prepare for attendance accounting and audit trail.