

**Sarasota County Public Schools
2013-2014 Charter School Application Process**

**Sarasota Military Academy Prep Charter Application
Charter Review Committee (CRC) Evaluation Findings and Final Ratings**

The evaluation findings are based on the extent to which the charter school application addressed the criteria required to meet each of the nineteen standards, as specified in the Florida Charter School Application Evaluation Instrument. Initial ratings are based on the CRC’s review and analysis of each charter school’s original application submitted on August 1, 2013. Applicants were provided an opportunity to review the CRC September 11, 2013 Initial Findings and responded to the CRC’s questions and requests for clarification. Applicants were not permitted to amend the application or correct major or significant deficiencies identified in the original application. However, SMA-Prep did submit additional information for Section 7, English Language Learners, and Section 17, Budget which was reviewed and evaluated by the CRC. Considering all information presented in the original application, the written responses to the CRC’s questions, and the oral responses provided by each applicant during the September 26, 2013 Clarification/Capacity Interview Session, the CRC arrived at the final ratings for each standard through unanimous consensus.

Charter Review Committee Final Ratings Summary

Charter School Applicant	I. Educational Plan Standards 1 – 8 Mission & Purpose, Target Population Educational Program Design Curriculum Plan, Assessment & Evaluation ESE, ELL, School Climate & Discipline	II. Organizational Plan Standards 9 – 13 Governance, Management, ESP, Employment, Student Recruitment & Enrollment	III. Business Plan Standards 14 – 19 Facilities, Transportation, Food Service, Budget Financial Management & Oversight Action Plan	Overall Total
Sarasota Military Academy Prep	63% Meets 25% Partially Meets 13% Does Not Meet	50% Meets 50% Partially Meets 0% Does Not Meet	67% Meets 17% Partially Meets 17% Does Not Meet	61% Meets 28% Partially Meets 11% Does Not Meet

Florida Charter School Application Evaluation Instrument

Each section presents criteria for a response that meets the standard, and these criteria should guide the overall rating for the section. The Strengths and Weaknesses boxes provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, especially if some of the data or evidence does not fit neatly into the criteria provided.

The following definitions should guide the ratings:

- Meets the Standard:** The response reflects a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.
- Partially Meets the Standard:** The response addresses most of the criteria, but the responses lack meaningful detail and require important additional information.
- Does Not Meet the Standard:** The response lacks meaningful detail, demonstrates lack of preparation, or otherwise raises substantial concerns about the applicant's understanding of the issue in concept and/or ability to meet the requirement in practice

1. Mission, Guiding Principles and Purpose

.I. Educational Plan

The education plan should define what students will achieve, how they will achieve it, and how the school will evaluate performance. It should provide a clear picture of what a student who attends the school will experience in terms of educational climate, structure, assessment and outcomes.

1. Mission, Guiding Principles and Purpose

The Mission, Guiding Principles and Purpose section should indicate what the school intends to do, for whom and to what degree.

Statutory References:

s. 1002.33(2)(a); s. 1002.33(2)(b); s. 1002.33(2)(c); s. 1002.33(6)(a)(1); s. 1002.33(7)(a)(1)

Evaluation Criteria:

A response that meets the standard will present:

- A compelling mission statement that defines the purpose and values of the school.
- A set of priorities that are meaningful, manageable and measurable, and focused on improving student outcomes.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths
Mentorship of the middle school cadets by the high school cadets shows continuity between schools. (Page 1)
Graphic demonstrates understanding of what differentiated instruction looks like. (Page 8)
The purpose and values of the proposed SMA Prep school are clear and well reflected in the school’s mission and vision. The expectations set for students are high and aligned to the school’s core values. (Page 4)
Military modeled environment with a focus on “Global leadership” that promotes student-directed leadership. (Page 6)
School will implement Differentiated Instruction and Gradual Release of Responsibility as the foundation for best practice in teaching and learning. (Pages 7-9)
Professional development goals integrate curriculum, instruction and assessment. (Page 12)

Concerns/Weaknesses:
 The data proposed to gage academic success (Section 1, Pages 6-7) is limited to FCAT and FAIR. Although the application mentions “other proven assessment tools” these are not defined.

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
How will you determine individual student needs on specific standards in Reading based on FCAT 2.0 data? (Page 6)	Based on FCAT 2.0 if a student scores level 2 or below, or was previously a level 1 or 2 and has not made adequate yearly gains, the student will be assessed using Diagnostic Assessment of Reading (DAR), which provides diagnostic information in 9 specific reading areas, and FAIR results. Individual student needs will be identified utilizing these results.	Response is acceptable.
Regarding the tutoring at school four days a week, how will this be reflected in the student’s daily schedule? (Page 9)	Tutoring will not be reflected in the student schedule. Tutoring will be an optional extension to the learning day and will take place after school. Tutoring sessions will increase the amount and quality of learning time to help provide an enriched and/or accelerated curriculum. Instruction in core areas will be provided. This will be indicated in the SIP as well.	Response is acceptable.
To measure learning outcomes, what other tools will you use in your data analysis to identify adequate progress? (Page 10)	In addition to FCAT, EOC, benchmark assessments and FAIR results, faculty and administrators will analyze student progress through the use of data from classroom assessments, both formative and summative, Study Island and, when indicated, DAR. Pre-tests will be utilized to determine background knowledge and instruction will be planned accordingly. Post tests will be administered to determine progress. Other valid tools will include student portfolios, journals, writing responses to prompts, reading logs, projects and performances.	Response is acceptable.

2. Target Population and Student Body

2. Target Population and Student Body

The Target Population and Student Body section should describe the anticipated target population of the school and explain how the school will be organized by grade structure, class size and total student enrollment over the term of the school’s charter.

Statutory Reference(s):

s. 1002.33(10)(e); s. 1002.33(6)(b)(2); s. 1002.33(7)(a)(1); s. 1003.03

Evaluation Criteria:

A response that meets the standard will present:

- An understanding of the students the charter school intends to serve.
- If the applicant proposes to target certain populations, the projected student body should align with the overall mission of the school.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths
 The school’s projected enrollment and local interest in SMA-Prep is strong. (Page 13)

Concerns/Weaknesses:
 The applicant should have included an evaluation of the make-up or composition for the area to project diversity.
 The application does not fully address the information requested in Section 2.B of the Model Florida Charter School Application. (Page 13)
 The applicant did not address how student enrollment projections were determined. (Page 13)
 The application would be stronger had the applicant addressed the type of marketing research (if any) was conducted to determine a need for the school and to determine projections, to gain an understanding of the demographics of the community and the population of students (e.g., minority, ESE/ELL, low income composition). (Page 13)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
<p>The application only provides student enrollment projections for three years. Please provide projections by grade level for years 4 and 5. (Page 13)</p>	<p>2017-2018 2018-2019</p> <p>6th 180 180</p> <p>7th 180 180</p> <p>8th 165 165</p>	<p>Response is acceptable.</p>
<p>Please note that the class size amendment, for charter schools, requires an <u>average</u> of 22 students per class, not 25 as indicated in the application. Please clarify. (Page 13)</p>	<p>SMA Prep aims to have an initial enrollment of 425 students and growing to 525 students by year three and maintaining the enrollment at 525 through years four and five. The average class size will be 22 in core classes (in accordance with class size amendment for charter schools), 25 in exploratory classes, and 15 in intensive classes.</p>	<p>Response is acceptable.</p>
<p>How were the student enrollment projections derived? Was consideration given to the enrollment of other neighboring schools? (Page 13)</p>	<p>The enrollment projections were derived based on the enrollment histories of middle schools in Sarasota from the District website, specifically charter middle schools. Expressed interest from current and former SMA parents and community members at large. A link on the SMA website requesting further information about SMA Prep has yielded over 200 responses, including parents with children in second and third grades.</p>	<p>Response is acceptable but will ask the applicant for more specific details, such as actual percentages.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u> The applicant was able to provide more detail regarding the percentage of students expected based on surrounding schools and their high school program. Response is acceptable.</p>

3. Educational Program Design

The Educational Program Design section should describe the educational foundation of the school and the teaching and learning strategies that will be employed.

Statutory Reference(s):

s. 1002.33(7)(a)(2)

Evaluation Criteria:

A response that meets the standard will present an educational program design that:

- Is clear and coherent;
- Is based on effective, research-based educational practices, teaching methods and high standards for student learning;
- Aligns with the school’s mission and responds to the needs of the school’s target population; and
- Presents evidence that the proposed approach will lead to improved student performance for the school’s target population.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths

The educational design is well-structured. In addition, the school serves a niche not presented in Sarasota County. (Section 3)

The program aligns to the mission of the school. The instructional models proposed for implementation are research-based and well established in the district. (Pages 15-17)

Differentiated Instruction and Gradual Release of Responsibility as the foundation for best practice in teaching and learning. (Pages 17-18)

Concerns/Weaknesses :

Section F in the application “If the school intends to replicate an existing school design” is partially completed.

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
<p>Is the applicant submitting the SMA Prep application as a replication of an “existing school design?” If so, the application does not fully address Sections 3.F and 3.G, as required below in the Model Florida Charter School Application. (Page 18)</p>	<p>While SMA Prep will not be an exact replicate of an “existing school design”, we will mirror the exemplary educational practices that have played an integral role in SMA’s achievements. Though JROTC will not be included in the curriculum, strong leadership skills will be embedded throughout the school. The Medal of Honor Curriculum will support this focus.</p>	<p>Response is acceptable.</p>
<p>Please clarify if the school intends to replicate an existing school design. If so, please provide the FLDOE verification and provide a full response to Sections 3.F and 3.G.</p> <p>F. Provide evidence that the existing design has been effective and successful in raising student achievement. <i>The effectiveness of an existing school design can be demonstrated by providing evidence of organizational viability and the success of the academic program, including compliance with legal requirements, as well as a direct relationship between program elements and student achievement.</i></p>	<p>While SMA Prep will not exactly replicate SMA, it will model SMA’s successful academic and behavioral expectations.</p> <p>SMA has a strong history of being rated as an A or B school and has been identified as a Florida High Performing Charter School in August, 2013. SMA continues to provide an environment of respect, honor and integrity, which is instilled in its cadets, and will be duplicated at SMA Prep. Cadets at SMA Prep will wear polo uniforms, which have been proven to impact student attitude towards themselves and others. These factors contribute to student success in academics and social-emotional health and well being.</p>	<p>Response is acceptable.</p>
<p>If the school intends to replicate an existing school design: G. Describe the applicant’s capacity to replicate an existing school design. <i>The capacity to replicate can be demonstrated by providing credible and well-defined strategies for replication, including the financial and human resources necessary to replicate the design.</i></p>	<p>SMA Prep will operate in conjunction with the SMA Board of Directors, the CFO and the Director of Schools. The Board of Directors has embraced its vision and mission to create and support SMA in all of its endeavors for the past 12 years. The Board currently seats five founding board members. The CFO from SMA will continue to provide services as CFO of SMA Prep. SMA has built and maintained a strong financial position and continues to maintain profitability on a yearly basis. SMA’s financial stability was strongly enhanced due to the generous gift of Jack and Thelma Urfer for the construction of a three story classroom building.</p>	<p>The fact that the existing SMA Board will also serve on the proposed SMA Prep Board supports the applicant’s capacity to oversee a successful charter school.</p> <p>Concerns remain regarding the school’s financial capacity and the proposed plan to share personnel.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u> See Section 17 – Budget, for outcomes.</p>

4. Curriculum Plan

The Curriculum Plan section should explain not only *what* the school will teach but also *how* and *why*.

Statutory Reference(s):

s. 1002.33(6)(a)(2); s. 1002.33(6)(a)(4); s. 1002.33(7)(a)(2); s.1002.33(7)(a)(4)

A response that meets the standard will present a curriculum plan that:

- Provides a clear and coherent framework for teaching and learning;
- Is research-based;
- Is consistent with the school’s mission, educational philosophy and instructional approach;
- Will enable students to attain Sunshine State-Common Core Standards and receive a year’s worth of learning for each year enrolled; and
- Will be appropriate for all students at all levels.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths

A solid description of the reading curriculum is provided. (Page 47)

Including the whole staff in some form of reading professional development is a strong goal. (Page 48)

The character development education curriculum is consistent with the school’s mission and philosophy. (Page 39)

Concerns/Weaknesses:

The application does not demonstrate a clear understanding of the curriculum and course requirements for middle school students. Examples follow:

The application does not provide information on how the school will evaluate the effectiveness of the curriculum, as required in the Model Charter School Application.

Legislative changes from Senate Bill 1079 effective July 1, 2013 have not been addressed for interventions, EOC requirements, etc.

Biology for high school credit does not align with the district’s SPP and is not referenced as an option in earlier plan. (Page 31)

The Career and Education Planning presented is not updated to current legislative requirements. (Page 39)

CAR-PD no longer exists and while NG-CARPD certainly has some sound instructional components, it has not been updated to align with CCSS. (Pages 40, 48)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments																				
<p>The application states that the school will follow the district's core curriculum plan (page 20) and the Student Progression Plan (SPP) and yet some courses listed in this section are not part of the district's SPP. Please clarify.</p>	<p>To further clarify and rectify concerns regarding curriculum and course requirements for middle school students, SMA Prep will follow the district SPP to include requiring all 6th, 7th, and 8th grade students successfully complete Language Arts, Math, Science, and Social Studies at each respective grade as indicated in the table below:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: yellow;"> <th style="text-align: center;">GRADE</th> <th colspan="4" style="text-align: center;">Required Courses</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">6</td> <td>Language Arts – must emphasize literature, composition, and technical text</td> <td>Math</td> <td>Earth/Space Science</td> <td>Social Studies</td> </tr> <tr> <td style="text-align: center;">7</td> <td>Language Arts – must emphasize literature, composition, and technical text</td> <td>Math*</td> <td>Life Science</td> <td>Social Studies/ Civics***</td> </tr> <tr> <td style="text-align: center;">8</td> <td>Language Arts – must emphasize literature, composition, and technical test</td> <td>Math*</td> <td>Physical Science/Biology**</td> <td>Social Studies/ Career Education And Planning</td> </tr> </tbody> </table>	GRADE	Required Courses				6	Language Arts – must emphasize literature, composition, and technical text	Math	Earth/Space Science	Social Studies	7	Language Arts – must emphasize literature, composition, and technical text	Math*	Life Science	Social Studies/ Civics***	8	Language Arts – must emphasize literature, composition, and technical test	Math*	Physical Science/Biology**	Social Studies/ Career Education And Planning	<p>Response is acceptable.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u> The applicant stated that they intend to offer high school Biology. While the district middle schools do not currently offer high school Biology, the implementation of the new (ACCEL) component of state statute may lead to this offering as well as additional high school courses. Response is acceptable.</p>
GRADE	Required Courses																					
6	Language Arts – must emphasize literature, composition, and technical text	Math	Earth/Space Science	Social Studies																		
7	Language Arts – must emphasize literature, composition, and technical text	Math*	Life Science	Social Studies/ Civics***																		
8	Language Arts – must emphasize literature, composition, and technical test	Math*	Physical Science/Biology**	Social Studies/ Career Education And Planning																		

	<p>*As stated in the Sarasota County Schools Middle School Student Progression Plan (grades 6-8) each middle school will offer at least one high school mathematics course for which students may earn high school credit. Middle school students enrolled in high school Algebra I must take and pass the statewide standardized EOC assessment in order to qualify for a standard high school diploma. However, if the middle grade student does not pass the EOC assessment in middle school, the student will have multiple opportunities in high school to retake the course and/or the assessment. Beginning with the 2012-13 school year, to earn high school credit for Geometry, the middle school student must take the statewide standardized EOC assessment, and the results of the EOC assessment must constitute 30 percent of the student’s final course grade. Currently, students must pass the course but are not required to pass the EOC assessment to earn high school credit, however, that is under review by the legislators.</p> <p>** Middle school students enrolled in high school Biology I must pass the statewide standardized EOC assessment, and the results of the EOC assessment must constitute 30 percent of the student’s final course grade. Students must pass the course but are not required to pass the EOC assessment to earn high school credit; however, to qualify for a standard high school diploma scholar designation they must pass the EOC.</p> <p>***Requirements for the middle grades career and education planning include: internet-based, easy to use and customizable to each student; include research-based assessments to assist students in determining educational and career options and goals; emphasize the important of entrepreneurship skills; inform students about diploma designation options; include information from the Department of Economic Opportunity’s economic security report as described in S.445.07, F.S. Beginning in 2013-14 the EOC will constitute 30 percent of the student’s final course grade for civics education.</p> <p>Remediation in Reading and Mathematics--Students who score Level 1 or Level 2 on the statewide standardized assessments must be enrolled in and complete a remedial course or a content area course</p>	
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	<p>in which remediation strategies are incorporated into the course content delivery. All teachers at SMA Prep will be NGCAR-PD trained by the end of the 2016-2017 school year. For each year in which a student scores Level 1 or Level 2 on FCAT 2.0 Mathematics, or another adopted state standardized assessment used in lieu of FCAT 2.0 for Mathematics, the student must receive remediation the following year.</p> <p>SMA Prep will provide students with all of the required courses to meet Sarasota County’s SSP and offer several course electives that are discussed in the original SMA Prep document, which will enhance and broaden course offerings. Additionally, some of the descriptions of offerings in the original SMA Prep application are descriptions of enhancements that will be interwoven into required curriculum to provide for a global perspective.</p> <p>The effectiveness of the curriculum will be assessed by analyzing data collected from progress monitoring data (FAIR), formative and summative assessments, pre-and post-test data, EOC scores, Benchmark Testing, and Statewide standardized assessment measures. Analysis of this data will pinpoint gaps in the curriculum and provide for adjustments in instruction.</p>	
<p>How will the English Lang Arts (ELA) and mathematics standards be integrated into the curriculum for the non-academic areas?</p>	<p>Literacy (ELA) will be infused into all content areas by inclusion of the ELA CCS strands required for science, social studies and technical courses and by the 5 school wide Literacy initiatives. One of the school wide Literacy initiatives is Reading by the Numbers which involves interpreting data, reading charts, graphs, etc. Teachers will receive extensive PD regarding implementation and inclusion of CCS-ELA and on the Literacy initiatives.</p> <p>SMA Prep recognizes that teachers in all content areas share responsibility for the development of reading, writing, listening, and speaking competencies. The ELA standards will be integrated into the curriculum for the non-academic areas through teachers selecting texts and using a rich array of instructional strategies and activities to meet student learning needs. Using individual subject curriculum,</p>	<p>Response is acceptable.</p>

	<p>teachers will align ELA standards to the grade-by-grade performance indicators as designated under CCS learning standards and key ideas. As educators develop and align ELA curricula for each grade, core performance indicators, literacy competencies, and grade-specific performance indicators must be addressed.</p> <p>In addition to subject-specific knowledge and understandings, there are some crosscutting capabilities that are common to all fields. NGCAR-PD training will provide teachers with the necessary skills to prompt close reading and CIS. Core specific indicators what students know and should be able to demonstrate for a specific subject, and grade specific indicators, what students should be able to do at a specific grade level will be assessed through benchmark assessments, pre and post-tests, and formative and summative assessments to measure student mastery.</p>	
<p>How does the school plan to address the Common Core ELA standards in Social Studies, Science, and Career and Technical subjects?</p>	<p>The Common Core ELA standards in Social Studies, Science, and Career and Technical subjects are part of the SMA Prep 5 Literacy Initiatives that are standard school wide. Through the independent reading requirement, students will gain adequate exposure to a wide range of texts. Rigor will be infused through the requirement of students be exposed to increasingly more complex text through the grade levels, in social studies, science, and technical subjects, reaching and maintaining mastery at each subsequent level. Common Core Standards specify the literacy skills and understandings required for college and career readiness in multiple disciplines. Social studies, science, and technical subjects will utilize their content area expertise to help students meet the particular challenges of reading, writing, speaking, listening, and language in their respective fields. These literacy standards are not meant to replace content standards in those areas but rather to supplement them. Teachers will receive training on CPALMS which provides resources of the ELA-CCS to include instructional/educational resources which have been utilized by teachers and educators for efficacy.</p>	<p>Response is acceptable.</p>

<p>How does the school plan to be certain that all teachers can incorporate the Comprehension Instructional Sequence (CIS)? (Page 41)</p>	<p>According to Laurie Lee, Reading Specialist for FDOE, since NGCAR-PD aligns with CCS, and since all SMA Prep teachers will receive the 90 hour NGCAR-PD training, their syllabus, lesson plans, and daily instruction should reflect CIS practices as observed through teacher observations, walk-through and individual PRIDE. Additionally, the Literacy Coach will model and monitor teachers to assure that CIS is incorporated with fidelity.</p>	<p>Response is acceptable.</p>
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5. Student Performance, Assessment and Evaluation

The Student Performance, Assessment and Evaluation section should define what students attending the school should know and be able to do and reflect how the academic progress of individual students, cohorts over time, and the school as a whole will be measured.

Statutory Reference(s):

s. 1002.33(6)(a)(3); s.1002.33(7)(a)(3); s.1002.33(7)(a)(4); s.1002.33(7)(a)(5)

Evaluation Criteria:

A response that meets the standard will present:

- Measurable educational goals and objectives that set high standards for student performance.
- Promotion standards that are based on high expectations and provide clear criteria for promotion from one level to the next, and for graduation (if applicable).
- Evidence that a range of valid and reliable assessments will be used to measure student performance.
- Assessment activities that are sufficiently frequent and a detailed plan to determine whether students are making adequate progress.
- Evidence that data will inform decisions about adjustments to the educational program.
- Plans for sharing student performance information that will keep students and parents well informed of academic progress.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Please note that the final rating remains “Partially Meets” because the deficiencies found in the initial application were deemed significant and pertained to the most essential criteria for this standard. Although the applicant was permitted to clarify information and answer specific questions posed by the CRC in writing and/or during the interview, the applicant was not permitted to submit new information, add new sections or make other substantive changes to the original application. During the interview process, the applicant was not able to demonstrate an understanding of the requirements or was not able to describe a plan to meet the standard thereby confirming the CRC’s rating.

Strengths
The goal to have 100% of students participating in a Leadership/Medal of Honor program each year (page 54) sets high expectations for good conduct and leadership for SMA Prep students.
A sound plan for sharing test results with parents is provided. (Page 57)

Concerns/Weaknesses:
Overall concern: For the most part, the information presented in this section of the application is broad, somewhat vague and lacking details such that it is difficult for the committee

to determine if the application meets the evaluation criteria. The assessment plan is not sufficiently detailed.

The application does not state goals and objectives and what the targets or improvements are expected each year. (Pages 53-54) Some objectives are stated on page 54 of the application, but they do not address all content areas, or grade, or years of the charter.

The information provided under section B is insufficient to determine if the applicant understands the requirements for middle school course recovery and promotion. The applicant did not provide a description of clear criteria for promotion from one grade level to the next. (Page 54)

The applicant’s response to Part 5.E lacks specificity. The Model Florida Charter School Application calls for a description of the types and frequencies of assessments the school will use to monitor student progress. The applicant’s response that they will follow the district’s testing calendar and agree to the annual School Improvement Plan goals does not fully address the question posed.

In this same section the application states that the school plans to administer other “school level assessments that are not part of the district’s assessment system” yet does not provide any detail about these tests or evidence that these assessments are reliable and valid. (Page 55)

Throughout the application the applicant refers to and includes ESOL students in the category of exceptional education students.

The RtI/MTSS process throughout the entire curriculum and disciplinary procedures are not fully explained.

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
How will the FLKRS assessment be used? (Page 54)	The FLKRS will be utilized only as a resource to be found in the cumulative file when students are identified as at-risk.	It seems unlikely a middle school would consider Kindergarten data, so the applicant should merely acknowledge that the FLKRS should not have been included in the application.
What are the “internal placement assessments” the school will use to determine student placement? And how will the assessments/placement procedures align with the district’s Student Progression Plan? (Page 54)	The internal placement assessments used at SMA Prep will include the SAT-10, pre-tests within content areas to determine prior knowledge, formative and summative assessments, Study Island and daily classroom anecdotes. When indicated, the Diagnostic Assessment of Reading (DAR) will be utilized for reading purposes. In addition to the district and state assessments, the previously mentioned assessments will provide valuable information regarding placement of students and appropriate instruction; remedial reading and math included. In turn, instructors will be able to monitor student progress and will determine promotion from grade levels according to the standards of the Student Progression Plan.	Response is acceptable regarding the DAR. See CRC’s comments regarding the use of SAT-10 in the next question.

	<p>In following the district’s Student Progression Plan, SMA Prep will address areas including student progression, remediation alternatives, retention, assessment and placement in alternative programs.</p> <p>The ACT EXPLORE assessment may be administered to 8th grade students. This assessment will help determine student college and career readiness. The ACT EXPLORE tests subject areas in English, math, reading and science that measures the skills and knowledge needed for college success. It will help 8th grade students explore options for their future not only at the high school level but their post high school plans whether college or career oriented.</p>	
<p>The district does not administer the Stanford Achievement Test in middle schools. Specifically, how will the Stanford Achievement Test be utilized at the proposed school? (Page 54)</p>	<p>The Stanford Achievement Test (SAT-10) is an assessment that will be used to show what students know and are able to accomplish. The test focuses on reading, language, spelling, listening, social science, mathematics and science. The assessment for reading includes various sub-tests, which can measure students’ vocabulary, phonics, decoding and comprehension skills. By administering this assessment, it will provide more reliable data, norms scaled scores, national and local percentile ranks and stanines, grade equivalents, and normal curve equivalents, as to where the student should be placed academically and identify specific needs the student may have.</p> <p>Instruction will address the skills and competencies that a student must master in order to be promoted from middle school to high school.</p>	<p>The description of the SAT-10 is accurate. However, SMA-Prep intends to follow the district’s Student Progression Plan (SPP) and testing program yet the district does not administer the SAT-10 or use SAT-10 for placement or promotion decisions. In addition, it is not clear what, if any, added value the SAT-10 data will contribute to the other test data.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u></p> <p>The applicant stated that they would <u>not</u> be administering the SAT-10. They confirmed that they intend to follow the district’s SPP.</p>

<p>Please describe in more detail what the “research-based assessment tools deemed appropriate” consist of. (Page 55)</p>	<p>The ACT EXPLORE is based on a philosophy that the best way to determine students’ readiness for further education and careers is to measure as directly as possible the knowledge and skills students will need in those settings. The ACT EXPLORE assessment is based on ACT’s College Readiness Standards and is aligned with the Common Core State Standards.</p> <p>The Diagnostic Assessment of Reading (DAR) assesses seven areas of specific reading skills.</p> <p>The Stanford Achievement test (SAT-10) is discussed in the above section.</p>	<p>The response partially addresses the question. The applicant describes the instrument but does not say who will take the ACT Explore, when it will be administered, or for what purpose.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u></p> <p>SMA-Prep plans to administer the EXPLORE to 8th grade students to assist in course selection and career planning as students enter 9th grade. This is an appropriate use of the test.</p>
<p>The response to E is too vague on how assessment data will be used to “monitor” student performance. Will this be part of the MTSS process? (Page 55)</p>	<p>The RtI (MTSS) Leadership Team will meet at least once a month.. Process and procedures have been established by the Sarasota School District and have been adopted by SMA Prep. The four critical parts of the planning/problem solving cycle include: Defining the problem or goal, analyzing the problem, developing and implementing a plan, and measuring the response to instruction/interventions. Student concerns will be presented to an administrator only after multiple attempts to provide a variety of interventions, differentiated learning, behavior modification, and a parent conference has been completed. At that time, the administrator will begin collecting information about the student and contacting the appropriate support staff for information. The Leadership Team will then discuss the student and provide additional interventions. The teacher is expected to utilize and document the impact of the interventions. Results are then presented back to the Leadership Team for review. The RtI (MTSS) Team works closely with the Administrative Team, the ESE Department, the Counseling Department, the PBS Team and all Department Chairs and the Behavior Specialist.</p>	<p>Response is acceptable.</p>

	<p>SMA Prep will use a variety of reports produced by the district Office of Research, Assessment and Evaluation on the academic achievement of students at all Tiers. Disaggregated AYP subgroup data by reading, mathematics, science and writing is utilized. Further, the school will participate in the FAIR progress monitoring assessment. Progress Monitoring Data/Assessments will be provided throughout the year as scheduled by the District Board Office. Data will also be collected and analyzed using student referral forms established in Tier 1. Progress monitoring data such as classroom assessments, FAIR, Benchmark Testing and FCAT will be used as well as discipline data using the RtI Database and classroom reports. The RtI Team (MTSS) and instructors will then document and record data regarding student progress, matching instruction and interventions to student needs.</p>	
<p>Will the state-required CELLA assessment be used in any way to monitor student progress? (Page 56)</p>	<p>SMA Prep will utilize CELLA data to determine and chart student progress over time and for new arrival students, charting progress over the first year will be in accordance with Title I and Title III of No Child Left Behind (NCLB).</p> <p>CELLA data will provide information about the language proficiency levels of individual students and will be used in making decisions regarding placement into or exit from, English for Speakers of Other Languages (ESOL) programs.</p> <p>Useful diagnostic information about students' strengths and weaknesses in English will allow SMA Prep instructors to provide specific instruction to the learner.</p>	<p>Partial response – needs follow-up at the interview. Use of CELLA for placement is contrary to district ELL plan, which SMA-prep intends to adopt.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u></p> <p>See remarks under Section 7, ELL.</p>

6. Exceptional Students

The Exceptional Students section should demonstrate an understanding of the requirements of the school to serve all students and provide a concrete plan for meeting the broad spectrum of educational needs and providing all students with a quality education.

Statutory Reference(s):

s. 1002.33(16)(a)(3)

Evaluation Criteria:

A response that meets the standard will present:

- Clear description of the levels of service the school will provide to students with disabilities.
- A clear description of how the school will ensure that students with disabilities (SWD) will have an equal opportunity of being selected for enrollment.
- An understanding and commitment to collaborating with the sponsor to ensure that placement decisions for students with disabilities will be made based on each student’s unique needs.
- An appropriate plan for evaluating the school’s effectiveness in serving exceptional students, including gifted.
- A realistic enrollment projection (SWD) and a staffing plan that aligns with the projection.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Final	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Please note that the final rating is “Partially Meets” because the deficiencies found in the initial application were deemed significant and pertained to the most essential criteria for this standard. Although the applicant was permitted to clarify information and answer specific questions posed by the CRC in writing and/or during the interview, the applicant was not permitted to submit new information, add new sections or make other substantive changes to the original application. During the interview process, the applicant was not able to demonstrate an understanding of the requirements or was not able to describe a plan to meet the standard thereby confirming the CRC’s rating.

Strengths

Concerns/Weaknesses:
 Rather than responding directly to the Section 6, parts A – I, the applicant inserted text verbatim from the high school charter contract between the district and SMA. In most instances the contract verbiage does not correspond to the information requested in the Model Florida Charter School Application for these areas. (Pages 58-59)

 The applicant incorrectly states that gifted students have IEPs. (Page 59)

The application does not address how the school will ensure that students with disabilities will have an equal opportunity for enrollment.

The application does not describe how the school will work with the sponsor to ensure the charter school is the appropriate placement for each student with a disability, based on the student's needs.

The application does not describe how the school will utilize the regular school facilities and adapt them to the needs of exceptional students to the maximum extent appropriate, including the use of supplementary aids and services.

The application lacks a clear explanation as to how exceptional students who enter the school below grade level will be engaged in and benefit from the curriculum.

The application lacks the staffing plan for the school's special education program, including the number and qualifications of staff.

The plan for evaluating the effectiveness of programs serving ESE and gifted students is not comprehensive.

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
<p>What are the student enrollment projections for ESE and gifted, by grade level, and how were the projections attained?</p>	<p>Based on the representation of the district and state averages, as presented in the most recent FDOE demographics, the enrollment projections for SMA Prep for the ESE and the gifted student population are as follows:</p> <p><u>ESE</u> Grade 6 (23% of student population) 35 students Grade 7 (21% of student population) 32 students Grade 8 (21% of student population) 26 students</p> <p><u>Gifted</u> Grade 6 (5% of the student population) 8 students Grade 7 (5% of the student population) 8 students Grade 8 (5% of the student population) 6 students</p> <p>The projections will increase through years two and three due to the projected enrollment increases.</p>	<p>The percentages are quite high and may be unrealistic. However, the response is acceptable.</p>

	<p>SMA Prep will ensure that all students with disabilities have an equal opportunity to attend SMA Prep. Applicants who have completed an application and are ESE will be asked to submit an IEP, 504, or EP along with the application. This process will ensure access to a free appropriate education regardless of their disability, provided that they are able to be served in the general education classroom with ESE support. All teachers will receive appropriate information regarding accommodations and will implement those tools as necessary for success of the student.</p> <p>For those students needing supplementary services, SMA Prep will contract with a qualified support professional.</p> <p>Additionally, all identified ESE students will be assigned a case manager who will monitor their progress to ensure success. A ratio of 1/30 will be a part of the model to include a resource/skills room which will be available for additional support as well as a place for extended testing time. All ESE case managers, resource room staff, and liaisons will be state certified ESE personnel.</p> <p>Classes for remediation in reading and math will be mandatory for all identified level 1 and level 2 students, even if they are not identified ESE. This process will also be part of the RtI/MTSS process and will track potential unidentified ESE students. In accordance with Sarasota County SPP, for each year in which a student scores a level 1 or 2 on FCAT 2.0 Reading, the student must be enrolled in and complete an intensive reading course the following year. All diagnostic, placement, progress monitoring, and reading and program strategies will be conducted in accordance with the Sarasota K-12 Comprehension Reading Plan.</p> <p>The ESE Coordinator and staff, in compliance with FDOE, federal and state regulations, will be responsible for program monitoring in compliance with district, state and federal guidelines and statutes and in assuring that each FTE survey is accurate and up to date. School administrators will review teacher lesson plans and conduct</p>	<p>Note: The CRC did not request this information. However, the CRC has reviewed and responded.</p> <p>The applicant’s response is relevant, however, because of the deficiencies in the application, the CRC needs to determine if the applicant has a sound understanding of the requirements to meet the needs of ESE students.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u></p> <p>Although the applicant appears to have an understanding of the requirements for eligibility, the information presented did not fully address how ESE students will be provided with direct instruction. Based on the applicant’s responses, the focus is more on compliance issues rather than the provision of instruction and monitoring of students’ academic progress.</p>
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	<p>classroom walk-throughs to monitor fidelity and implementation to school’s instructional ESE models.</p> <p>In addition, monitoring will be completed to ensure ESE students are provided with equal access to grade level curriculum and school programs. To monitor compliance and the effectiveness of the ESE program, administrators and the ESE Coordinator will monitor daily lesson plans, instructional strategies listed in teacher plan books, CCSS reflected in instruction and progress data and summative and formative data results.</p> <p>SMA Prep recognizes EPs for gifted students rather than IEPs.</p>	
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Additional CRC Observations Based on Outcome of the 9/26 Interview:

There were concerns that the applicant did not fully understand what is required to determine a student’s eligibility for ESE/504 services and/or accommodations. The CRC believes the applicant did have an understanding of ESE/504 compliance, but due to the lack of a detailed budget aligned to staffing and services, the CRC is concerned that students may not receive the required specially designed instruction, services and/or accommodations to be offered at SMA Prep.

7. English Language Learners

The English Language Learners section should demonstrate an understanding of the requirements of the school to serve English Language Learner students and provide a concrete plan for meeting the broad spectrum of educational needs and providing all students with a quality education.

Statutory Reference(s):

s. 1002.33(10)

Evaluation Criteria:

A response that meets the standard will present:

- Demonstrated understanding of state and federal requirements regarding the education of English language learner students.
- Sound plans for educating English language learner students that reflect the full range of programs and services required to provide all students with a high quality education.
- Demonstrated capacity to meet the school’s obligations under state and federal law regarding the education of English language learner students.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Final	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Please note that the final rating remains “Does Not Meet” because the deficiencies found in the initial application were deemed significant and pertained to the most essential criteria for this standard. Although the applicant was permitted to clarify information and answer specific questions posed by the CRC in writing and/or during the interview, the applicant was not permitted to submit new information, add new sections, or make other substantive changes to the original application. During the interview process, the applicant was not able to demonstrate an understanding of the requirements or was not able to describe a plan to meet the standard thereby confirming the CRC’s rating.

Strengths
The use of a variety of methods to engage English Language Learners (ELL) who are below grade level in order to meet their needs and enable them to benefit from the curriculum. (Page 60)

Concerns/Weaknesses:
The procedures for identifying ELLs and providing support services are not described in the application. (Page 60, Part A)
A sound plan for educating English language learners is not presented; no programs or services are listed. (Page 60)
The application does not provide a detailed plan on how they will meet the needs of ELL students. The staffing plan is not provided and no information was submitted related to staff qualifications. (Page 60)

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
<p>What is the projected number of ESOL Certified Teachers? (Page 60)</p>	<p>It is our goal at SMA Prep to ensure that 100% of the instructional staff will be ESOL Certified or endorsed, in compliance with state laws, by the end of the 2014-2015 school year. ELL students will receive quality instruction from ESOL certified or endorsed instructors.</p> <p>Identify SMA Prep will strive to identify all ELL students upon enrollment to SMA Prep. According to the Florida Department of Education, Florida Statutes define an English Language Learner (ELL) as “an individual who was not born in the United States and whose native language is a language other than English; an individual who comes from a home environment where a language other than English is spoken in the home; or an individual who is an American Indian or Alaskan native and who comes from an environment where a language other than English has had a significant impact on his or her level of English language proficiency; and who, by reason thereof, has sufficient difficulty speaking, reading, writing, or listening to the English language to deny such individual the opportunity to learn successfully in classrooms where the language of instruction is English” (1003.56(2)).</p> <p>Federal law requires all schools to identify ELL students and screen eligible students for language assistance. SMA Prep will administer a home language survey to parents and students enrolling in their native language when feasible unless the student’s cumulative records contain a HLS that was completed upon initial enrollment at a previous school in the District. The home language survey and national origin data of all students collected will be retained and added to the district recording system (AS400). SMA Prep will administer a home language survey upon registration on a separate survey to include the following questions, as required by Rule 6A-6.0902:</p>	<p>Response is acceptable.</p> <p>The CRC did not request this information. However, the response is appropriate.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u></p> <p>The applicant provided appropriate verbal responses to the following questions: Which language proficiency assessment will you identify students eligibility for ESOL service? Response: IPT. How will you use CELLA? Response: to exit from ESOL program and for monitoring proficiency on all 3 levels.</p>

	<p>a. Is a language other than English used in the home? b. Did the student have a first language other than English? c. Does the student most frequently speak a language other than English?</p> <p>Additionally, registration procedures followed for non-ELLs, non-English speaking parents or guardians will receive translated versions of registration forms, Home Language Surveys, Free and reduced lunch applications, and general school information, if available in their language.</p> <p>If any questions are answered yes, the registrar will provide a copy of the HLS to the ESOL coordinator immediately to ensure that further assessment is completed within ten days of entering school. SMA Prep’s ESOL Coordinator will follow the District Plan for Services to English Language Learners to determine what further testing is necessary and employ the necessary assessments as outlined in the County plan. The Literacy Coach will consult with the ESOL Coordinator to assist with progress monitoring and facilitate compliance with District, state, and federal guidelines and statutes.</p> <p>Placement All ELL students will be placed in an “age-appropriate” setting based on the recommendation of the ESOL Coordinator, guidance counselor, and an administrator. Students entering SMA Prep from another country will receive credit for equivalent courses offered in the United States. Students classified as ELL will be placed into appropriate ESOL courses and core content areas based on their assigned grade level. The District’s SPP will be followed for placement, progression, remediation alternative, retention assessment, and placement in special and alternative programs.</p> <p>ELL Plan The ESOL Coordinator is responsible for developing the Student ELL Plan at the beginning of the school year, and all updates</p>	<p>Applicant’s written response does not indicate understanding. “If any questions are answered yes, the registrar will provide a copy of the HLS to the ESOL coordinator immediately to ensure that further assessment is completed within ten days of entering school.” Please note that the response in this section does not mention any language proficiency assessment being used for placement in program.</p>
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	<p>required for maintaining the Student ELL Plan. The ELL Coordinator will enter the Student ELL Plan information into the Student database system. A hard copy of the Student ELL Plan will be maintained in the student’s Cumulative folder along with supporting documentation.</p> <p>Program Monitoring The ESOL Coordinator, in compliance with FDOE, federal and state regulations, will be responsible for program monitoring in compliance with district, state and federal guidelines and statutes and in assuring that each FTE survey is accurate and up to date. School administrators will review teacher lesson plans and conduct classroom walk-throughs to monitor fidelity and implementation to school’s instructional ESOL models.</p> <p>Equitability SMA Prep will provide ELL students instruction that is equal in amount, sequence, and scope to non ELL students. ELL students will be provided access to appropriate core academic subjects including intensive instruction in ELA and basic subject areas. School administrators will monitor teacher lesson plans and conduct classroom walk-throughs to ensure that ELLs are provided equal access to grade-level curriculum and school programs.</p> <p>Assessment SMA Prep will assure that all ELL students participate in statewide assessments. The testing coordinator, in conjunction with the ESOL Coordinator will make sure that all accommodations on all assessments have been offered to ELL students. A letter will be sent home to parents explaining the accommodations available for their children, and this letter will be maintained within the individual student’s ELL file.</p> <p>Review After yearly review ELL students that are determined to be English language proficient will be exited from the ESOL program. Upon</p>	<p>Applicant’s written response under “Equitability” does not indicate understanding.</p>
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	request of a student's teacher, counselor, administrator, or parent, a student who has been classified as an ELL and in the ESOL program may be reevaluated for English proficiency. The ESOL Coordinator is responsible for conducting the required two-year Post Reclassification Monitoring follow up of former ELL students to ensure their academic success.	
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Additional CRC observations based on outcome of the 9/26 interview:

The CRC was concerned that the application stated that ELL students would receive equal access to grade-level curriculum and school programs. Therefore, the CRC asked for a description of how the school plans to meet the language needs of ELL students. The applicant responded that once per week a case manager would meet with each student to review progress. The CRC restated the question about how they were planning to meet the language needs of ELLs, the answer (paraphrased) was that currently the ESOL services mirror ESE services, about 78% of their staff is ESOL endorsed or certified and that part time educators are used for elective classes. The verbal response provided is of concern to the CRC because the needs of ELL students are very different than the needs of ESE students. Mirroring ESE services does not meet State and Federal requirements for educating ELL students. Providing access to the same curriculum and programs as for non-ELLs does not meet the language needs of ELLs.

8. School Climate and Discipline

The School Climate and Discipline section should describe the learning environment of the school and provide evidence that the school will ensure a safe environment conducive to learning.

Statutory Reference(s):

s. 1002.33(7)(a)(7); s. 1002.33(7)(a)(11); s. 1002.33(9)

Evaluation Criteria:

A response that meets the standard will present:

- A sound approach to classroom management and student discipline.
- Legally sound policies for student discipline, suspension, and dismissal.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths

Concerns/Weaknesses:

The CRC is very concerned that the school proposes to drug test middle school students, ages 11 – 14, and questions whether this is a legally sound policy. (Page 61)

The application lacks a detailed plan for classroom management, as requested in Section 8, Part A. (Page 61)

There is no outlined process on how students will be withdrawn. References to “administrative procedures” are vague. (Pages 61-62)

It is not clear how PBS will be implemented and how it is part of the MTSS process. Therefore it is difficult to determine what the management program will look like and whether or not it is an adequate plan.

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
<p>The application proposes to follow the district’s Code of Student Conduct, which prohibits drug testing of students. (Page 61) Please address this conflict.</p>	<p>Parents and students attending SMA Prep will read and sign a contract which is attached in TAB 21. Each contract addresses a drug-free environment with the agreement and understanding that any student may be subject to drug testing. This concept was originated by the founding students at SMA who presented this idea to the CEO and SMA Board of Directors. The students believed that in order to have an outstanding school students should be drug free. SMA Prep will follow this exemplary model.</p>	<p>Concerns remain regarding the appropriateness or legality of drug testing young students.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u> The applicant stated that if approved, the school would NOT conduct any type of drug testing and that the code of conduct and parent contracts will reflect this policy.</p>
<p>The application lacks a detailed plan for classroom management. The application references a “clearly defined Classroom Procedures and Expectations” document. Please provide a copy. (Page 61)</p>	<p>The classroom procedures and EAGLE Expectations documents are submitted with this document located in TAB 20.</p> <p>Teachers will have a plan for classroom management which includes the classroom procedures and EAGLE Expectations. Furthermore, teachers will be given the opportunity to attend PD on classroom management approaches for success learning environment based on PRIDE observations and administrative walk-throughs. Teachers will have syllabi which states the school’s classroom procedures but also the teacher’s expectations. Syllabi will be taken home for parent review and a parent signature will be returned to school with the student. This will be kept in the classroom teacher’s student file.</p> <p>Direct contact via electronic networking or telephone will be utilized to assure positive behaviors in the classroom.</p>	<p>Response is acceptable.</p>
<p>The information presented under Part B related to dismissal procedures is text taken verbatim from the charter contract between the district and SMA. The committee is asking for draft copy of the documents referenced on page 61 – the Parent Contract and the School’s Admission Policy. Please submit. (Page 61)</p>	<p>Copies of parent and student contract have been submitted with this document located in TAB 21.</p> <p>Admission documents are also provided with this submission. The documents will be revised to reflect appropriate SMA Prep contact information. The information is located in TAB 22</p>	<p>Based on the CRC’s review of the draft parent contract and the draft admissions procedures the response is acceptable.</p>

<p>It appears as if there is a more in-depth approach to the Military model of expectations, which is fine, but how does PBS tie in to that whole philosophy?</p>	<p>PBS will play an important role in supporting the Military expectations at SMA Prep. The PBS Team will meet on a monthly basis and will consist of teachers, students, administration, parents and community members. The PBS approach will be in conjunction with that of SMA. EAGLE cards will be given to students for going above and beyond expectations. EAGLE cards will be distributed to every faculty and staff member as well as any support staff. Drawings will take place monthly as well as other rewards to be established by the student population. A “Positive Incident Reporting Form” will also be utilized to recognize particular students for outstanding accomplishments. The form will be completed and given to the Head of School. The Head of School will call the student into the office and report to the student that they have been identified as an outstanding student. The parent is contacted at this time as well and a copy of the form is placed in the student file.</p> <p>Copies of the forms have been provided and will be amended to reflect SMA Prep located in TAB 23.</p> <p>SMA Prep recognizes the importance of continuity from school to school and will mirror the PBS program as it relates to the middle school years.</p>	<p>Response is acceptable.</p>
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Additional CRC observations based on outcome of the 9/26 interview:

The CRC expressed great concerns regarding SMA-Prep’s intent to randomly drug test students who could be as young as 11 years of age and, if the tests are positive for drugs, then use the results for dismissal. The application states that the school will follow the district’s Student Code of Conduct and the district has no such policy. In addressing the Committee’s concerns, the applicant acknowledged that conducting random drug tests on students in the middle grades may not be appropriate or the best approach to ensure a drug-free environment. The applicant further clarified that, if approved, SMA Prep charter school would not implement random drug testing as part of the school’s policy. The applicant further clarified that in the event random drug testing was going to be reconsidered in the future, it would seek the approval of the sponsoring district’s School Board.

II. Organizational Plan

The Organizational Plan should provide an understanding of how the school will be governed and managed. It should present a clear picture of the school’s governance and management priorities, what responsibilities various groups and people will have, and how those groups will relate to one another.

9. Governance

The Governance section should describe how the policy-making and oversight function of the school will be structured and operate.

Statutory Reference(s):

s. 1002.33(7)(a)(15); s. 1002.33(9)

Evaluation Criteria:

A response that meets the standard will present:

- Documentation of proper legal structure of the governing board, or a plan to organize in conformity with the laws of Florida.
- A clear understanding and description of the governing board’s responsibilities.
- Evidence that the proposed governing board will contribute to the wide range of knowledge and skill needed to oversee a charter school.
- A clear, sensible delineation of roles and responsibilities in relation to governance and school management.
- A sensible method for resolving disputes between parents and the school.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths

Concerns/Weaknesses:
 The applicant did not follow the format and outline of the Florida Model Charter School Application. It is very difficult to follow the applicant’s responses because the majority of the narrative provided is taken from the charter contract between the district and SMA; there is no one-to-one correspondence to the items/requested information in the sections of the Model Florida Charter School Application.

The governance section does not clearly address if the school will have a management company. (Page 64-65)

The application does not provide an organizational chart or a description of the reporting structure and relationship of governing board and school, as required in Section 9.A. (Page 63)

The application failed to address Section 9. G, which requires that the application list each of the proposed members of the school’s governing board, indicating any ex-officio members and vacant seats to be filled. For each proposed member, the application must include a brief description of the person’s background that highlights the contribution he/she intends to make through service as a governing board member and any office of the board that individual holds.

The application does not provide a full description of how the governing board will fulfill its responsibilities and obligations. (Page 64)

What relevance does the information presented in the application under C, D, E and F (page 65) have to the information requested for those sections in the Model Florida Charter School Application?

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
Please provide an organizational chart for the school and a narrative description of the chart. (Page 63)	The organizational chart is located in the original charter under Tab 19, Addendum A. The Headmaster reports directly to the Board of Directors. The Headmaster/Principal has overall responsibility for all aspects of the school. He/She is supported by the Assistant Headmaster/CFO, supporting staff, and Assistant Principal. Department chairs will be the instructional leaders for the individual departments. Supervision of faculty and staff will be the overall responsibility of the Headmaster/Principal, shared with the Assistant Headmasters.	Response is acceptable.
The applicant failed to address Section 9 F, which requires that the application describe the plans for board member recruitment and development, including the orientation process for new members and ongoing professional development. Please address this question.	The current Board of Directors for the Sarasota Military Academy will be the governing board for SMA Prep. Should a new Board member be required, nominations will be presented to the Audit and Governance subcommittee. The Audit and Governance subcommittee is responsible for vetting all nominations to the BOD and making a final recommendation to the Board. The Chairman is responsible for orientation and training of the new Board members. At a minimum, all new Board members will attend District approved Sunshine State Standards training.	Response is acceptable.
Please provide a list of the proposed governing board members and their curriculum vitae.	The curriculum vitae documents and list of proposed governing Board members are submitted in TAB 24.	Response is acceptable.

<p>The application discusses terms for a school using a management company or an educational service provider (pages 64-65, E-G). The information is confusing and conflicts with other parts of the application. What is the school's plan? Will the school contract for services with a management company? Or an ESP provider? Please clarify. (Page 64)</p>	<p>SMA Prep will not contract with a management company. Educational service providers will be utilized as needed in accordance with IEPs, 504s and EPs when services are not available within the school's program.</p> <p>In order to establish and maintain continuity in academic and behavioral expectations between SMA Prep and SMA, the Board of Directors and the SMA Prep administrative team will work in conjunction with one another to ensure fidelity between shared policies and procedures.</p>	<p>Response is acceptable.</p>
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10. Management

The Management section should describe how the day-to-day administration of the school’s operations will be structured and fulfilled.

Statutory Reference(s):

s. 1002.33(7)(a)(9); s. 1002.33(7)(a)(14)

Evaluation Criteria:

A response that meets the standard will present:

- A management structure that includes clear delineation of the roles and responsibilities for administering the day-to-day activities of the school.
- A sound plan for the recruitment and selection of the school leader.
- A viable and adequate staffing plan aligned with the projected student enrollment.
- A sound plan for recruiting and retaining qualified and capable staff.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Please note that the final rating remains “Partially Meets” because the deficiencies found in the initial application were deemed significant and pertained to the most essential criteria for this standard. Although the applicant was permitted to clarify information and answer specific questions posed by the CRC in writing and/or during the interview, the applicant was not permitted to submit new information, add new sections or make other substantive changes to the original application. During the interview process, the applicant was not able to demonstrate an understanding of the requirements or was not able to describe a plan to meet the standard thereby confirming the CRC’s rating.

Strengths
The management structure provided is appropriate (as per chart in attachment A of the application).
The school’s plan for recruitment, selection, and development of qualified staff meets the evaluation criteria. (Page 68)

Concerns/Weaknesses:
The application does not include a viable and adequate staffing plan. (Page 67)

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
None.		

11. Education Service Providers

The term “education service provider” (ESP) refers to any number of organizations that contract with the governing board of a school to provide comprehensive services. The three major types of ESPs that serve charter schools are education management organizations, comprehensive school design providers, and virtual school management organizations. The Education Service Provider section should describe, if applicable, the contractual arrangement between the school’s governing board and such a provider.

Statutory Reference(s):

s. 1002.33(7)(a)(9)

Evaluation Criteria:

A response that meets the standard will present:

- A persuasive explanation of the reasons for contracting with an education service provider.
- A persuasive explanation of how the proposed relationship with the ESP will further the school’s mission.
- A clear description of the services to be provided by the ESP.
- A clear delineation of the roles and responsibilities between the school’s governing board and the ESP.
- A clearly defined performance-based relationship between the school’s governing board and the ESP.

CRC Rating	Not Applicable	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths
n/a

Concerns/Weaknesses:
n/a

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
n/a		

12. Employment

The Employment section should define the policies and procedures that frame the school’s relationship with its staff.

Statutory Reference(s):

s. 1002.33(7)(a)(14); s. 1002.33(12)

Evaluation Criteria:

A response that meets the standard will present:

- A compensation plan that will attract and retain quality staff.
- Policies and procedures that hold staff to high professional standards or a sound plan for development of policies and procedures.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Please note that the final rating remains “Partially Meets” because the deficiencies found in the initial application were deemed significant and pertained to the most essential criteria for this standard. Although the applicant was permitted to clarify information and answer specific questions posed by the CRC in writing and/or during the interview, the applicant was not permitted to submit new information, add new sections or make other substantive changes to the original application. During the interview process, the applicant was not able to demonstrate an understanding of the requirements or was not able to describe a plan to meet the standard thereby confirming the CRC’s rating.

Strengths
The application includes contract language related to the principal and teacher evaluation requirements of Section 1012.34, F.S.

Concerns/Weaknesses:
The application does not provide a compensation plan. (Page 70)
The application states that the “School will implement written policies and procedures” but the application does not provide the proposed personnel policies and procedures to which staff will be required to adhere, including expectations for participation in the school’s professional development program. (Page 70)

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
<p>Because the narrative presented in the application is taken verbatim from the high school charter contract between the district and SMA, the information is presented as an “If, then....” situation. So, will staff be public or private employees? (Page 71)</p>	<p>All SMA Prep staff will be public employees; therefore, the response should read “The School, as a public employer, will participate”</p>	<p>Response is acceptable.</p>
<p>If personnel policies and procedures have not been developed please provide a clear plan, including timeline, for the development and approval by governing board. (Page 70)</p>	<p>Please see plan below for development of personnel policies and procedures.</p> <p style="text-align: center;">Sarasota Military Academy Prep Staff Policy & Procedures Proposal</p> <p>9/1/13 – Draft Copy to be completed and submitted for revisions. 10/1/13 – Final copy completed 11/1/13 – Submitted to Board for review and recommendations 1/15/14 – Submit final approval to Board</p> <p>Absences, Tardies, and Leave Requests Accidents Activities and Sponsorship Announcements and School News Assembly Behavior and Procedures Attendance Policy (teachers responsibility for student attendance records) Bookkeeping Procedures/School Funds Bulletin Boards Calendar: School Calendar Chaperones Cheating by Students Classroom Expectations Classroom Management/Supervision Clinic Clubs and Organizations Code of Student Conduct Conferences – guidelines for an Effective Parent Conference Conference – student/teacher/parent Copy machines Custodial Services Department Chairpersons Department Meetings Discipline of Students Dress Code- staff Duty Assignments</p>	<p>Response is acceptable. The applicant will model the personnel policies for SMA Prep based on those established for the current SMA high school.</p>

	<p>Email Emergency Procedures Employee Assessments Errands Faculty Meetings Field Trips Food & Beverages Grades Grading Policy & Procedures Guidance Department Homework Inservice/Staff Development In-School suspension Lesson Plans Lost and Found Mailboxes Make-up Work Map of Campus Media Center News Releases/Media Parking Passes Paychecks & Pay Stubs (Distribution of) Personal (Confidential) Information Personnel Files Placement – Teacher Guidance for Student Placement Progress Reports Resource Room Registration Schedule and Cafeteria Duty School Facilities Usage Smoking and other Tobacco Products Student Attendance Student Records Telephone Messages Testing Textbooks Voicemail Workplace Violence</p>	
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13. Student Recruitment and Enrollment

The Student Recruitment and Enrollment section should describe how the school will attract and enroll its student body.

Statutory Reference(s):

s. 1002.33(7)(a)(7); s. 1002.33.(7)(a)(8); s. 1002.33(10)

Evaluation Criteria:

A response that meets the standard will present:

- A student recruitment plan that will enable the school to attract its targeted population.
- An enrollment and admissions process that is open, fair, and in accordance with applicable law.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths
 SMA Prep enrollment policies are appropriate and meet statutory requirements. (Page 73)

Concerns/Weaknesses:
 The application does not fully explain how the school will achieve a racial/ethnic balance reflective of the community it serves or with the racial/ethnic range of other local public schools. (Page 73)

The application does not fully describe the lottery process. (Page 74)

The CRC is extremely concerned about the proposed policy to conduct random drug testing of 11 – 14 year old students (page 74). The school purports to follow district policies yet drug-testing of students is not part of Sarasota County Student Code of Conduct procedures nor is it approved as a method to ensure drug-free schools.

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/ Comments
<p>The application does not fully explain how the school will achieve a racial/ethnic balance reflective of the community it serves or with the racial/ethnic range of other local public schools. How will the school know? What is the anticipated racial/ethnic composition of the target student population in relation to the community? (Page 73)</p>	<p>The racial/ethnic balance at SMA Prep will be reflective of the broad community due to the area it will serve. The demographics proposed by SMA Prep are based on the latest census information and current SMA demographics. They are as follows:</p> <p>White: 81% Hispanic: 9% African American: 5% Other Nationalities: 5%</p> <p>SMA Prep will monitor enrollment and run surveys.</p>	<p>How the school will achieve its goals are not clear.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u> Acceptable response. The applicant verbally described the projected proportions by ethnicity and provided examples for neighboring schools.</p>
<p>What is the start and end of the enrollment period and at what point in time is a lottery conducted? (Page 73 and timeline in Section 19, Page 82)</p>	<p>Enrollment for the 2014-2015 school-year will begin in January, 2014 and conclude in August, 2014.</p> <p>The open enrollment period will be January 2014 through March 2014. If the number of open enrollment applicants exceeds the capacity of the program, class, grade level, or building, all applicants who submitted an application within the open enrollment period will be admitted through a lottery process. The lottery will take place in April, 2014, if needed, and parents will be notified of acceptance within 2 weeks of the lottery results.</p> <p>Enrollment will continue from April 2014 through August 2014 as space allows.</p>	<p>Response is acceptable.</p>
<p>In lieu of drug testing students, has the school considered other alternatives, such as a comprehensive awareness and prevention plan, the use of PBS/MTSS methods and guidance counselors to assist students who may be experiencing issues with substance abuse?</p>	<p>SMA Prep will meet these needs through the RtI/MTSS and PBS teams as well as counselors, behavior specialists, school nurses and school psychologists.</p> <p>If a student tests positive for drugs, the student and parent must attend a counselor-advised meeting. At that time substance abuse programs will be discussed and a course of action will be determined.</p>	<p>Concerns remain about the proposed drug testing.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u> See outcome described in Section 8.</p>

<p>Explain any student and/or family contracts that will be used as a requisite for initial and continued enrollment in the school. Describe if and how the school will enforce such contracts. Provide a draft copy of the parent/student contract. (Page 74)</p>	<p>SMA Prep will require parents/guardians and student to sign a contract for initial acceptance and continued enrollment at the school. The contract will be visible in the SMA Prep planner for continued enforcement. A student will receive a warning of the misguided behaviors; further actions will result in a discrepancy report or referral. Continued blatant non-compliance will result in dismissal from SMA Prep. Contracts are provided in TAB 21.</p>	<p>Response is acceptable.</p>
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III. Business Plan

The Business Plan should provide an understanding of how the charter operators intend to manage the school’s finances. It should present a clear picture of the school’s financial viability including the soundness of revenue projections; expenditure requirements; and how well the school’s budget aligns with and supports effective implementation of the educational program.

14. Facilities

The Facilities section should provide an understanding of the school’s anticipated facilities needs and how the school plans to meet those needs.

Statutory Reference(s):

s. 1002.33(7)(a)(13); s. 1002.33(18)

Evaluation Criteria:

A response that meets the standard will present:

- A realistic plan for acquiring a facility that is appropriate and adequate for the school’s program and targeted population.
- Evidence that the school has access to the necessary resources to fund the facilities plan.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths

SMA has provided a possible site with building layout and parking. Also included are types of spaces needed with square footages needed and an estimated cost to construct. The budget for the land is \$780,000 while the County appraisal is at \$407,300, hopefully they can get it for the lower.

SMA has previous experience with constructing a school and knowledge of the size and numbers of spaces they will need. It is recommended that they look over the budget again with the above mentioned in mind. (Pages 85-89, Addendum B)

Concerns/Weaknesses:

The facility budget is based on 350 students while elsewhere in the document it states that they plan on starting with 425 and working up to 525. Classroom size is stated at 800 s.f. which is smaller than DOE’s recommended size of 960 for grades 6-8. Allowed but a larger classroom would allow for additional students if enrollment increases.

The estimate talks about administration and cafeteria in the same building, while admin/media is shown on the site plan. No cafeteria shown on the site plan. Total s.f. is listed at 42,000 s.f. compared to an estimated 52,000 s.f. based on DOE’s recommended areas. The estimate states a cost per s.f. of \$72.00 for the shell of the structure. There is no mention of mechanical, electrical, plumbing, fire alarm & sprinklers or FF&E. A cost of \$150-\$160/s.f. seems more reasonable. The schedule allows 7 months for construction which is very

aggressive (tight).
 It was difficult to follow and evaluate the applicant’s responses because the majority of the narrative provided is from the charter contract between the district and SMA. There is no one-to-one correspondence to the items/requested information in the Model Charter School Application. (Page 75)

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
In addition to architect’s map and aerial photo, please provide a narrative description of the proposed facility, including location, size and layout of space. (Page 75) Secondly, describe how the facility will meet the school’s capacity needs for students to be served.	The new school will be located on Fruitville Road, 2 miles east of I75. Initially, the school will consist of an Administrative and Cafetorium building, two classroom buildings, with a total of 24 classrooms, and a gymnasium. The plans for these are currently being developed, and we intend to add additional space in the gym to allow for a wrestling and martial arts room. Total s.f. will be sufficient to accommodate up to 525 students. Ample space is available on site to add additional facilities if enrollment increases in subsequent years.	Response is acceptable.
Identify, if applicable, any funding sources (other than state and local funding) that will be applied to facilities-related costs.	This facility will be 100% funded through investment by the general contractor and leased to the school. Monthly lease costs will be well within our capacity to fund without requiring development of other funding sources.	Response is acceptable
What is the alternate plan for facilities if the proposed facility is not available or is not ready for the school’s opening?	The developer is confident the facility will be completed prior to the beginning of the 2014-2015 school year, but in the unlikely event they are unable to complete the facilities, we will utilize modular buildings installed on the north end of the property until the permanent facilities are completed.	Response is acceptable. The budget does show \$50,000 monthly for leasing facilities or modulars.

15. Transportation

The Transportation section should describe how the school will address these services for its student body.

Statutory Reference(s):

s. 1002.33(20)

Evaluation Criteria:

A response that meets the standard will present:

- A transportation plan that will serve all eligible students.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths
The applicant acknowledges that transportation must be provided to meet state statute. (Page 76)

Concerns/Weaknesses:
The application does not describe how the school plans to follow the requirements required for transporting students and other state and federal laws.

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
The application does not provide a plan for transportation. (Page 75)	The school will contract with the district to provide transportation for its students living within Sarasota County. Students living outside of Sarasota County will be required to provide their own transportation.	Acceptable but the CRC will ask for additional clarification as a follow-up to the next question below.

<p>Again, because the application is text copied verbatim from the high school charter contract between the district and SMA, it is not clear if the school plans to contract with the district or with another provider. Please reconcile “should the school choose to provide its own transportation” and “the school may enter into a separate agreement with the sponsor.” Which is it? (Page 76)</p>	<p>The school will contract with the district to provide transportation for its students.</p> <p>SMA Prep’s goal is to eventually acquire its own buses.</p>	<p>It is unclear when SMA Prep plans to provide its own transportation.</p> <p>The CRC requested clarification during questioning at the 9/26 interview.</p> <p><u>Interview Findings:</u> The applicant clarified that they plan to contract with the district for transportation in years 1-3, and to provide their own transportation in years 4 and 5.</p>
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16. Food Service

16. Food Service

The Food Service section should describe how the school will address these services for its student body.

Statutory Reference(s):

s. 1002.33(20)(a)(1)

Evaluation Criteria:

A response that meets the standard will present:

- A food service plan that will serve all students.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths
SMA Prep Charter indicates that they will provide a Child Nutrition Program for free, reduced, and paid students.

Concerns/Weaknesses:
The application language states that “if” the school uses the services of the Sponsor, they will provide the lunches. However, there is no indication of what will happen if SMA Prep chooses not to use the FNS services of the Sponsor. (Page 77)

Areas in Need of Additional Information and/or Clarification	Charter Applicant’s Response	CRC Review/Comments
Because of the “If then…” scenarios, the food service plan is unclear. What is the plan?	The school will contract with the district to provide food services for its students.	Response is acceptable.

17. Financial Management and Oversight

17. Budget

The Budget section should provide financial projections for the school over the term of its charter.

Statutory Reference(s):

s. 1002.33(6)(a)(5); s. 1002.33(6)(b)(2)

Evaluation Criteria:

A response that meets the standard will present:

- Budgetary projections which are consistent with all parts of the application, including the school’s mission, educational program, staffing plan and facility.
- A realistic assessment of the projected sources of revenue and expenses that ensure the financial viability of the school.
- A sound plan to monitor the budget and make adjustments as necessary.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Final	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Please note that the final rating remains “Does Not Meet” because the deficiencies found in the initial application were deemed significant and pertained to the most essential criteria for this standard. Although the applicant was permitted to clarify information and answer specific questions posed by the CRC in writing and/or during the interview, the applicant was not permitted to submit new information, add new sections, or make other substantive changes to the original application. During the interview process, the applicant was not able to demonstrate an understanding of the requirements or was not able to describe a plan to meet the standard thereby confirming the CRC’s rating.

Strengths

Concerns/Weaknesses:

The SMA Prep budget plan does not meet the criteria requested in Section 17 for Budget information. Sections A through F are deficient in that it does not provide the budget requested in the level of detail required to adequately evaluate the viability of the budget plan. (Section 17, Page 78)

The budget submitted in the application by the Sarasota Military Prep charter school does not meet the standard for the following reasons:

- The 3 year budget does not contain any of the State Board red book functions or objects to determine that the school will be in compliance with class size, provides for necessary support services in the operation of a school etc.
- The budget submitted does not provide sufficient detail to determine the number of staff being funded or the staff functions and has no provision for applicable payroll taxes or

17. Financial Management and Oversight

any other employee benefits.

- The budget submitted has one line item entitled Other expenses: (Equipment; Insurance: utilities; supplies; etc) that does not detail the individual composition of the various appropriations.
- The CRC cannot determine if provisions are made for instructional materials, staff development, a required audit, etc.

In summary the submitted budget does not have the 5 year required budget, a required monthly cash flow, proper accounting terminology, and the applicable State Board red book accounting of functions, objects, and fund accounting.

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response													
None.	<p>All start-up expenses, including Principal and staff salaries, office space, equipment and supplies, postage, marketing, transportation, and communication expenses will be funded by SMA.</p> <p>The submitted budget was developed utilizing revenue data provided by Mr. Al Weidner for the projected student enrollment. Expenses were consolidated into the three major categories of facilities, salaries, and other expenses to mirror the budgets that were submitted with SMA's initial application, and subsequent, five and fifteen year renewal applications. Expenses were determined through analysis of SMA's current operating expenses, adjusted for the reduced number of students anticipated at SMA Prep, and savings we expect to realize through efficiencies we will gain by relying on Governing Board, Administrative, and Staffing functions currently in place at SMA. The third year budget figures are expected to remain static for all subsequent years, and should not require material adjustment until additional facilities are built to accommodate increased student enrollment. We do not anticipate that will occur until after the fifth year of operation. The Advancement Office currently staffed by SMA, will pick up the additional responsibility for developing and executing fundraising opportunities for SMA Prep.</p> <p>An expanded version of the submitted budget, included below, is provided for your review.</p> <table border="1" data-bbox="741 1312 1843 1438"> <thead> <tr> <th></th> <th>Year 1</th> <th>Year 2</th> <th>Years 3-5</th> </tr> </thead> <tbody> <tr> <td></td> <td>425 Students</td> <td>475 Students</td> <td>525 Students</td> </tr> <tr> <td>Revenue:</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Year 1	Year 2	Years 3-5		425 Students	475 Students	525 Students	Revenue:				<p>In the applicant's response they indicate that the Sarasota Military Academy Charter School will fund the start-up expenses. The amount pledged is not listed. There is no line item detail presented to allow the reviewer to determine that the startup budget will be sufficient to properly plan for the opening of a new charter school.</p> <p>Al Weidner, Deputy Chief Financial Officer, was contacted July 31, 2013 by Frank Laudano to run various projections based upon 425 students, 475 students, and 525 students. The original application did not use the revenue projections provided. The rewrite of the budget uses the requested revenue projections, however, important information is still missing, including:</p> <ol style="list-style-type: none"> 1) the number of staff or the amount being budgeted per staff member; 2) details about years 3 through 5 because the five year budget combines these years and does not allow the determination of the fund balance for each individual year. 3) State Board approved expenditure functions,
	Year 1	Year 2	Years 3-5											
	425 Students	475 Students	525 Students											
Revenue:														

17. Financial Management and Oversight

FTE	1,643,450	1,835,966	2,042,620	<p>so the amount budgeted for direct instruction etc. cannot be determined.</p> <p>4) there is no first year monthly cash flow so whether the school will be able to meet their first year of monthly operational cost cannot be determined.</p> <p>In summary the budget rewrite still does not meet the standard. The sponsor is aware that this charter school application will be a feeder to the current Sarasota Military Academy Charter School. However, with the deficiencies in this application's the budget section, the CRC is concerned that the new school could cause a deterioration in the financial condition of the existing charter school.</p>
Discretionary Millage	301,749	337,249	372,749	
Referendum Millage	403,408	450,867	498,327	
Supplemental Academic Instruction	86,518	96,697	106,875	
Reading Allocation	20,568	22,988	25,408	
Safe Schools	10,867	12,145	13,423	
Class Size Reduction	382,704	427,728	472,752	
District Admin Fees	-83,802	-83,780	-84,099	
District Transportation	-56,087	-71,735	-101,180	
Total Base & Supplemental:	2,709,375	3,028,125	3,346,875	
Community Donations	40,000	45,000	50,000	
Total Revenue Excluding Capital	2,749,375	3,073,125	3,396,875	
Capital allowance @ 400 / FTE	170,000	190,000	210,000	
Total Revenue:	2,919,375	3,263,125	3,606,875	
Estimated Expenses:				
Lease Costs	600,000	650,000	775,000	
Salaries	1,350,000	1,550,000	1,675,000	
Retirement Benefits	66,285	76,105	82,243	
SS & Medicare	103,275	118,575	128,138	
Employee Benefits	127,940	135,320	139,620	
Worker's Compensation	15,000	16,000	17,000	
Unemployment Insurance	12,500	13,000	13,500	
Employee Training & Seminars	42,500	30,000	30,000	
Professional & Technical Services	92,500	95,000	97,500	

17. Financial Management and Oversight

	Property & Liability Insurance	105,000	107,500	110,000
	Repairs & Maintenance	27,500	35,000	42,500
	Communications (Postage & Phone)	12,500	13,000	13,500
	Water & Sewer	22,500	23,000	23,500
	Electricity	95,000	97,500	100,000
	Material & Supplies	120,000	125,000	130,000
	Non Capitalized Furniture & Equipment	7,500	15,000	22,500
	Total Estimated Expenses	2,800,000	3,100,000	3,400,000
	Margin above expenses	119,375	163,125	206,875

Additional CRC Observations Based on Outcome of the 9/26 Interview:

There is an ongoing concern that the applicant did not provide a start-up budget for the new school. Given that the plan is for the existing SMA high school to fund the new charter, there are concerns whether this move would push the high school into financial distress since SMA already has an outstanding bond yet to be fully paid. The applicant acknowledged that the submitted budget did not include salary figures for all staff hires (at least 3) or the expense of implementing an IB Program.

Other budget concerns include the miscalculation of the cost to participate in the Florida Retirement System. Additionally, the investors want the school to buy out their lease agreement within 3 years of operation, which may again place additional financial obligations on the school. Without receiving additional details, including a breakdown of the ending fund balance, the CRC could not determine the school's chances at sustainability.

Lack of financial information and data is a tremendous concern for the CRC. The sponsoring district Board members should be aware that the CRC further believes the applicants are making the assumption that because they have been able to successfully operate a grade 9-12 high school that the SMA Prep will experience success. In addition, the applicants acknowledged that current SMA employees will assume dual roles at both school sites, which may also present unforeseen HR challenges. The lack of financial data does not allow the sponsor to determine if the applicant has budgeted enough funds to hire an appropriate number of teachers.

18. Financial Management and Oversight

18. Financial Management and Oversight

The Financial Management and Oversight section should describe how the school's finances will be managed and who will be responsible for the protection of student and financial records.

Statutory Reference(s):

s. 1002.33(6)(a)(5); s. 1002.33(7)(a)(9); s. 1002.33(7)(a)(11)

Evaluation Criteria:

A response that meets the standard will present:

- A clear description of how the school's finances will be managed. The description must include assurances that the governing board retains ultimate control over the school's finances.
- A clear description of strong internal controls. The system of internal controls must be sufficient to safeguard finances.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Final	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Please note that the final rating is "Partially Meets" because the deficiencies found in the initial application were deemed significant and pertained to the most essential criteria for this standard. Although the applicant was permitted to clarify information and answer specific questions posed by the CRC in writing and/or during the interview, the applicant was not permitted to submit new information, add new sections or make other substantive changes to the original application. The written responses submitted to the CRC on September 18, 2013 did not fully address the CRC's concerns. The application addresses most of the criteria in this section, however, the initial areas of concerns/weaknesses and the partial responses to the CRC' request for clarification were not sufficient to fully meet the standard 18.

Strengths

Concerns/Weaknesses:

The applicant did not follow the format and outline of the Model Florida Charter School Application. It is very difficult to follow the applicant's responses because the majority of the narrative provided is from the charter contract between the district and SMA, and there is no one-to-one correspondence to the items/requested information in the sections of the Model Charter School Application.

Internal controls are not presented. (Pages 78-79)

18. Financial Management and Oversight

The application does not provide a clear description of how the school's finances will be managed. (Page 79)

The application does not provide adequate detail in order to discern if the school's system of internal controls will be sufficient to safeguard finances. (Pages 79-80)

The applicant did not describe the insurance coverage the school will obtain. (Page 80)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
<p>What internal controls will be in place to safeguard finances?</p>	<p>The SMA Board of Directors retains ultimate control over the school's finances. The CFO will manage the finances adhering to published internal controls currently established for Sarasota Military Academy. (Provided upon request)</p> <p>An independent accounting firm, currently Kerkering & Barberio, will verify the monthly financial statements prior to their submission to the BOD and to the district.</p> <p>Each month the BOD will review and approve the financial status of the school and provide guidance on areas such as funding priorities, maintenance of reserve funds, incurrence of short and long-term debt, and replacement of fixed assets.</p> <p>Each year, an independent, external auditor, currently Pellegrino, Honick, PA, will conduct a comprehensive audit and report their findings to the BOD.</p> <p>All financial data will be maintained using QuickBooks with all supporting documentation digitally scanned and attached to each transaction. All paper records will be maintained in secure, fireproof, filing cabinets, and digital records will be maintained on Kerkering & Barberio's secure server with both on and off-site backups maintained daily.</p>	<p>The response is vague and lacks sufficient detail about the internal controls that need to be in place.</p>
<p>Describe the insurance coverage the school will obtain, including applicable health, workers compensation, general liability, property insurance, and directors and officers liability coverage.</p>	<p>Employee benefits will mirror the districts whenever possible. Health, dental, vision, and life insurance will be provided, at employer expense, to all full time employees. Workers compensation, FUTA & SUTA insurance, along with general liability, director and officer's, and comprehensive auto and property insurance will be maintained at or above the levels required by the district. SMA Prep intends to retain Larry Robbins, Brown & Brown Insurance, as its agent of record, and coverages will mirror those in force at SMA.</p>	<p>The response partially addresses the requested information. It does not indicate specific dollar amounts of coverage.</p>

19. Action Plan

19. Action Plan

The Action Plan should provide a clear roadmap of the steps and strategies that will be employed to prepare the school to be ready to serve its students well on the first day of operation.

Statutory Reference(s):

s. 1002.33(7)(a)(16)

Evaluation Criteria:

A response that meets the standard will present an action plan that:

- Provides a thoughtful and realistic implementation plan that covers major operational items and provides flexibility for addressing unanticipated events.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Final	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strengths

Concerns/Weaknesses:
The action plan and timetable is sparse and minimally meets the standard. (Page 82)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
None.		