Sarasota County Public Schools
2011-2012 Charter School Application Process

Sarasota Charter Academy of Excellence

Charter Review Committee Review and Analysis of the Charter School Application and Addenda
October 14, 2011

General Comments:

Although the Sarasota Charter Academy of Excellence has many good ideas, the Charter Review Committee has ongoing concern regarding many details of the proposal; most notably, deficiencies in the curriculum design, the school's relationship to the Educational Service Provider and the proposed budget.

The applicant has failed to articulate how multiple proposed learning theories and strategies will be translated into a clear and coherent instructional program and how the intensive professional development required will be provided and funded. The committee is concerned the school will have difficulty articulating its mission and garnering community support unless more consideration is given to the overall goals and targeted population of the school. The applicant responses to student performance, assessment and evaluation are poorly organized and do not clearly indicate an understanding of adequate student performance evaluation techniques.

There is much confusion regarding the roles of the Educational Service Provider and the Board of the proposed school. Additionally, the membership of the board and the qualifications of its members are unclear. The applicant has not provided the required process, including "due diligence" used for the selection of an Educational Service Provider. Regardless of the applicant's intent to use an Educational Service Provider, the applicant has a responsibility to present a properly qualified board possessing the range of knowledge and skills needed to oversee the operations and finances of the proposed school.

The committee has concern regarding the structure and staffing for ESE and ESOL services. The staffing allocation of one ESE liaison is inadequate to meet the needs of the school. Additionally, certification requirements and a plan for recruitment and selection of a highly qualified staff are not presented. The applicant does not provide the required detailed staffing plan, including instructional, non-instructional, administrative and support staff for each year of the proposal.

The applicant has not submitted a facility plan for the school as required. Additionally, after the Review Committee requested additional budgetary information, the revised information as submitted would present conditions that would place the school in a financial emergency under current state statute. A budget for transportation service has not been provided and the applicant has indicated intent to issue a Request For Proposal for food services without submitting a proposal for evaluation to the Review Committee. The applicant has not provided a realistic budget for the school.

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	☐	☒	☐
Second	☐	☒	☐
Final	☐	☐	☐

Strengths
The school's mission is to establish an authentic learning community and environment, which will lead to greater academic achievement for all students, with a focus on ELL students using a STEM approach. (Page 3)   **The explanation of constructivist foundation is clearly explained. (Page 3 – 4)**

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The plan mentions STEM throughout, but there is no mention of STEM career planning. (Page 3)**	1. While STEM is a part of the driving force behind SCAE, no specific mention of STEM career planning was a part of the application. It was perhaps a weakness in not mentioning what we felt obvious to us in that within classes career	1. Appropriate clarification

The applicant does not clearly define an "authentic learning community". What does this look like in terms of the school's day-to-day operation? (Page 8) **A CCRP, a comprehensive core reading program, is only part of an elementary plan. Why is the applicant planning to use it at middle school?** **It is difficult to discern the degree to which the proposed school meets this standard because the applicant references and describes several different educational models, initiatives, programs, approaches, theories, strategies (and the terms are used interchangeably), thus it is not clear as to what the school intends to adopt.** **What is the charter proposing that is new or different than what is already occurring in the district? (Page 3 – 12)**	opportunities are consistently put forth to students as viable options for their future. Furthermore, a STEM approach as per definition does begin the training of students in various areas as the students work through real life problems and activities. Additionally, students will gain insight into a world that is in constant transition as new discoveries, new technologies, and new opportunities unfold. Students will be continually counseled and encouraged by their teachers to explore STEM related career opportunities. 2. Authentic learning is a process whereby students work with not only real-life scenarios, but with a process that begins with their own questions. Authentic learning uses the texts and other resources as background material utilized to further the answering of questions and support for authentic real-life problem solving activities in which students are engaged versus a curriculum based on reading, worksheets and memorization of disconnected facts that are often seen as unimportant information and factoids of no immediate use or importance. 3. When discussing the inception of our school we had envisioned K-12 unit school. However, after further deliberation decided on a 6-12 school. When editing and changing out the information we inadvertently left that part in. However, the CCRP in conjunction with the CIRP would be used with	 2. The committee acknowledges SCAE definition of authentic assessment, but would like to know how this will be specifically accomplished at SCAE during a regular school day. 3. The use of elementary program for middle school student is not appropriate.

students at the Middle School Level who are still reading at the Elementary Level. We felt the CCRP might allow for a better learning experience for those that had been left behind. Additionally, especially important would be for our targeted ELL population who will not be on level with reading due to their possible lack of skills in the English language.

4. SCAE sees each of the methods, approaches, theories and strategies that have individually gained notoriety in the world of education as one whole collective unit not as disconnected entities. As you point out…interchangeable. They have a base in each other, while having some important small part that is different in each area, yet to us seen as important to have been included. The Holistic Approach to the Total Child is the overall educational model with the foundation being constructivism. The Pillars that hold up the overall program or educational model, link the foundation to the overall model are our other programs, models, processes and theories as outlined in our application.

5. We are proposing a school that is based firmly in the model (models) outlined, not as a sometimes activity or field trip that supports the claim. As a new school, we are, in our eyes, freer to build a school totally dedicated to a STEM approach that is supported by the other mentioned theories and processes. Whereas this

4. While the applicant may see these multiple approaches, theories and strategies as a cohesive unit, they have failed to articulate how all of this will be translated into a clear and coherent instructional program and how the intensive professional development required will be provided and funded.

	approach that is being adopted by most schools to varying degrees, transitions from old ways to new ways are not normally complete taking years to unfold, and often if not usually fail due to not having a complete "buy in" by all parties affected for said changes. Additionally, said program (methods, theories and processes) have been sufficiently documented with research to help the ELL and learning disabled students achieve at a higher rate and a higher level when exposed to these learning process. As far as we can ascertain, no other schools in the district utilize the Constructivist or Holistic Approach to the Total Child, as the over all full time approach in all areas of their school. This gives rise to "learning by doing, and project-based learning" at all levels, in all areas, every day. No course or subject area stands alone, they are woven together into a whole.	

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	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths

The school will be open to any Sarasota school district student at the grade levels served by the school. (Page 13)

Allowable enrollment preferences for siblings and children of employees and board members are clearly identified. (Page 13)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **Despite the school's mission emphasizing services for ELL students, there is no indication in this section of the applicant making any special efforts to enroll ELL students. (Page 13 – 14)** **The school's high school population is very small, especially in years 2 (66 students) and year 3 (132 students). It is unclear how the school will support a full high school curriculum for such a small student population. (Page 13 – 14)** **Given the emphasis on serving ELL students, no information is provided about how this group will be targeted. No projections of the percent of ELLs are provided. (Page 13)** **Page 13 indicates it is a K-8 school than on page 14 indicates it is a 6 through 12 school Page 18 references elementary and middle school sections. Page 32 again refers to a K-8 school. It is unclear as to the target population in this section.**	1. We were led to believe, via input by personnel at the district level, it was suggested that by placing a school in the North Port area that would put the school in an area where there was a significant population of ELL students, thereby supporting our effort to enroll ELL students. Furthermore, once the application is approved, there will be a campaign that will include invitations to ELL students. Please see page 13 paragraph 1. 2. Until the school's high school enrollment will support a wide range of teachers in various areas that are often options in high schools, we will concentrate on: a. The core academic classes via our approach. b. Offer a wide variety of online/electronic course work. c. Endeavor to hire multi-talented teachers who will be able to offer a	The applicant is unclear as to the targeted population. The committee is concerned the school will have difficulty articulating its mission and garnering community support unless more consideration is given to the overall goals and targeted population of the school. The response partially addresses the concern.

| | variety of electives and or after school programs, clubs and activities.
3. When we first envisioned the school we were thinking K-12, we then thought K-8, but finally decided what we really wanted was a 6-12 school. During different editing processes, the different references were in advertly left in. | |

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	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths
The school will follow the Sarasota School District calendar and ensure 180 days of academic instruction. (Page 15 – 16)
The school will provide a seven period day including seven hours of academic instruction. A sample daily schedule is provided. (Page 15 – 18)
The school intends to offer a before and after school tutoring program. (Page 33)

Professional development activities and timelines are identified. (Page 37)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: The applicant's intention to incorporate several learning theories and methodologies into the school's proposed program (authentic learning communities, STEM instruction, project based learning, an Holistic Approach to the Whole Child, the Constructionist approach, arts-based curriculum, team teaching, interdisciplinary thematic learning, differentiated instruction, Marzano learning strategies, career planning, character education, and emphasis on ELL students) is extremely complex and challenging. The applicant will need to identify how all of these theories and methodologies will be incorporated into a clear and coherent instructional program and how it will be supported throughout the application. (Page 15 – 41) The application includes research citations for various components of the proposed instructional program but does not provide a compelling case that the research base for the program as a whole will produce improved student learning for the school's targeted population. (Page 15 – 32) The application identifies the key components of an effective RTI process but does not specify how, and by whom the process will be implemented at the proposed school. (Page 34) Overall , this section of the application reads more like a research paper than a charter school application. The section includes a number of research citations supporting some of the various instructional strategies and methodologies to be utilized, but lacks a clear plan as to how all of this will be incorporated into a coherent and achievable instructional program. (Section 3)	1. As stated in previous questions in other sections, we stated all the terms for educational methods, processes, theories and explained them and attempted how to us, they all are interlinked, related and interchangeable to a great degree. Furthermore, said methods, processes, and theories support all students, but most importantly, support the academic achievement of ELL students as well as students who often have difficulties in many of the traditional classroom schools. Please refer to questions 1, 2, 4, and 5 from section 1 for a more complete picture to answer this question. 2. What we might call this would be a blended model. SCAE sees each of the methods, approaches, theories and strategies that have individually gained notoriety in the world of education as one whole collective unit not as disconnected entities. As you point out…interchangeable. They have a base in each other, while having some important small part that is different in each area, yet to us seen as important to have been included. The Holistic Approach to the Total Child is the overall educational model with the foundation being constructivism. The Pillars that hold up the overall program or	As stated in previous responses in other section, while the applicant may see these multiple approaches, theories, and strategies, as a collective unit, they have not clearly articulated how all of this will be translated into a clear and coherent instructional program and how the intensive professional development required will be provided and funded. While the applicant may see these multiple approaches, theories and strategies as a cohesive unit, they have failed to articulate how all of this will be translated into a clear and coherent instructional program and how the intensive professional development required will be provided and funded.

| Given the focus on serving the needs of ELL students, the proposed design does not address the program needs of these students. | educational model, link the foundation to the overall model are our other programs, models, processes and theories as outlined in our application. Please also refer to page 9, paragraph 5.

3. The RTI process will begin with the teacher and or parents, or other members of the school team who identify students they feel needs intervention. These students are discussed at team meetings, and if sufficient concern exists and sufficient data is presented, the School Counselor, ESE Specialist and or ELL Specialist, will bring the student up for discussion with the School RTI Team, and School Support Team. Once they have gathered information they call a meeting with the concerned teachers and parties involved with the student to generate a response to intervention. Teachers are then asked to used interventions and collect data over a specified period of time. From that point all groups work together. However, the ultimate party or parties responsible for the RTI process include those members of the School Wide Support Team with the School Counselor and Specialist as the "leaders" of the process.

4. As stated in various answers to other very similar questions, to the framers of this application, these strategies, methodologies etc., which we endeavored to explain in detail, are all related and when brought together represent the entire process we are dedicated to | |

| | implementing. The reason behind using all areas is that, while to us they represent the same basic processes, each individually contains small factors that add to a more complete picture of what we hope to achieve and to implement for a school rooted in action and discovery which, does and will result in, a comprehensive authentic learning for all involved. Authentic Learning is not forced bits of facts stored away but learning that culminates in meaningful understanding and remembered for life, not just the test. We believe in the process, which is in the end what is important…as we will be able to show it is attainable and will work. Please see page 12, lines 7-12.

5. We believe it does address the needs of the ELL students. Please see page 3 lines 8-30, and also page 20, lines 7-42, for more information as well as other areas of the application. | |

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 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	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths
The application identifies the need to offer intensive reading classes to students performing below grade level on FCAT reading. (Page 44)   **Course offerings at each grade level are identified. (Page 44 – 60)**   **The applicant intends to implement the school district's comprehensive reading plan. (Page 71)**   **The competencies for the school's non-core courses are clearly identified. (Page 73 – 79)**

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The committee is concerned that the science curriculum is missing a life science component and the social science curriculum should have a civics course with an end of course exam.** **What provisions are made for 10th grade students that do not pass FCAT or EOC in 11th grade?** **The science curriculum is missing physical science in preparation for Biology.** **The applicant should provide a graduation chart indicating all appropriate graduation criteria and assessment requirements. (Page 15 – 41)** **The applicant's reference to Collier County Schools on Page 52. The error**	1. This area was obviously left out during the typing and editing of this section. We would be teaching all of the sciences in an approach that reflects Earth, Life and Physical Science at the Middle School Level. Civics will also be a part of the curriculum. 2. Please see page 64 in the application. Please also see attached PDF document: highschoolgradrequirements for more information. 3. Our 8th Graders will be taking Physical Science in preparation for High School Biology. 4. Please see the attached PDF document: highschoolgradrequirements for more information.	The curriculum plan is difficult to follow and it is unclear, from the variety of strategies and methodologies listed, what the program is. The committee is concerned the plan is disjointed and unfocused.

should be corrected. (Page 52) **The high school program will include service learning and incorporation of the common principles of the Coalition of Essential School's, raising additional issues regarding the volume of instructional strategies and methodologies to be incorporated into the school's program and the applicant's capacity to implement the proposed program. (Page 53 – 54)** **Reference to adherence to "Collier County Reading Plan" Read 180 will serve intensive reading students. The program's cost is not budgeted. (Page 45)** **The underlying principal of STEM is the integration of science, technology, engineering and mathematics, yet the curriculum proposed does not make this evident. (Page 62, 63)** **The purported focus on ELL is not supported in the curriculum. The only mention of curriculum appropriate to ELL is in reference to assessments.**	5. The error has been noted. However, it is our understanding that we cannot alter said document until the application has been approved. 6. Service Learning is an enhanced version of what other schools call Community Service and require students to participate in with specific numbers of service. The reference to the Coalition of Essential School's ideals are embedded into the curriculum of our school. They are not difficult areas to maintain, or use, but a core philosophy to share, demonstrate and adopt by all parties involved. 7. References to Collier County are in error and will be changed. 8. Please see pages 58 paragraph 2, page 61 paragraph 2, page 62 paragraph 1, page 63 paragraph 1. 9. Throughout the paper we refer to the ELL student and the curriculum, and what our school can do to support the ELL student through the programs. Please refer to the section on ELL in this document. Please also refer to the application pages 7, 8, 9, 10, 12, 19, 20, 27-32, 39,42,44…	

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	☐	☒	☐
Second	☐	☒	☐
Final	☐	☐	☐

Strengths
The applicant identifies some measurable academic goals for the proposed school. (Page 81)
The school will comply with the school district's student progression policy. (Page 81)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **There is no plan specified in the application to address students who fail to pass EOC exams.** **The application is missing a progress monitoring plan which is required by the state. (Page 81)** **The school's academic goal for reading appears to be duplicated while the goal for mathematics is omitted. What are the FCAT proficiency goals in Mathematics? (Page 81)**	1. Please see page 64, and the PDF attachment: highschoolgradrequirements for more information. 2. As per state statute 1008.25(4): A progress monitoring plan is intended to provide the school district and the school flexibility in meeting the academic needs of the student and to reduce paperwork. A student who is not meeting the school district or state requirements for proficiency in reading and math shall be covered by one of the following plans to target instruction and identify ways to	1. Acceptable response 2. Acceptable response

The FCAT proficiency goal in reading is unclear. Is the 86% proficiency standard applicable at all grade levels for each year of the charter? (Page 81)

The application does not provide high school graduation requirements, indicating that the school will not serve high school students. This is obviously incorrect. (Page 85)

The applicant does not provide a clear plan for formative assessment that identifies: 1) the valid and reliable instruments to be utilized, 2) the frequency of those assessments, 3) how, and by whom, assessment data will be analyzed, and 4) how assessment data will be shared with teachers and used to improve instruction. (Page 84)

Goals are not provided annually. It is not clear if goals are per grade level. No goals are specified for students who do not take the FCAT.

Math and science EOCs targets are listed but nothing for the middle school FCAT Math and Science tested grades.

FCAT Writing is not administered at grade 6 – perhaps it was intended to set goals for grade 8 and 10?

With the school's emphasis on ELL, it is strongly recommended that the school sets goals based on the state's Comprehensive English Language Learners Assessment (CELLA).

STEM education is greatly emphasized yet the school does not have any set goals related to technology.

The school should include performance goals for high school students, such as graduation rates, college readiness, and advanced academics.

All required state assessments are not listed in the application.

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improve his or her academic achievement:
- o A federally required student plan such as an individual education plan (IEP);
- o A schoolwide system of progress monitoring for all students; or
- o An individualized progress monitoring plan.

SCAE will have a school wide system for monitoring the progress of all students.

3. Please see page 81 of the application, paragraph 5.

4. It is applicable to all grade levels. Goals most normally are based on the previous years percentages, and formulated in the hope to continually make strides in increasing the percent of mastery by 2-10 percentage points each year.

5. Please see the answer to the same question in the previous section and the attached PDF document: highschoolgradrequirements for more information.

6. All teacher/school/text-based tests are based on and support the NGSSSs. Student data is constantly collected and evaluated. These tests are in addition to the county assessments, which we plan to take part in and utilize the data obtained

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3. Paragraph 5 states the Science goal and also states that the school will meet or exceed the district or state passing rates on the EOCs.

4. Response is acceptable.

5. Although the provision of the brief list of graduation requirements is relevant, it is disconcerting that the applicant originally stated that it would serve elementary and middle school students and did not address any high school level requirements.. The CRC has serious concerns that the applicant understands the pupil progression and graduation requirements or is well prepared to address the needs of high school students.

	from those tests to advise the learning goals of students as the year progresses. The FCAT2.0 is used as the baseline data for each student as a new year begins. FCAT2.0 data, and county testing data showing student achievement and weaknesses will be noted, per standard and benchmark for each. Furthermore, all teacher/text-based bi-weekly tests, which are NGSSS based, will be noted for standard and benchmark mastery, or lack there for each student. Teachers will have data that shows where each class as a whole stands proficiency wise. This data will drive instruction.	6. The reply only partially responds to the CRC's question.
	7. Please refer back to questions 4 and 9 of this section.	7. What?
	8. Please see page 80 paragraph 5 for information dealing with this question. Paragraph 5 should also have said "math and science".	8. Correction noted.
	9. Many schools give students "mock" FCATs for writing and science while the 8th graders are engaged in taking the tests, for both experience and for establishing a baseline.	9. Please acknowledge the error. The application clearly states that "90 percent of the sixth grade students……scoring at 3.0 or above on FCAT." If mock data will be used to set school educational goals, then this should be specified as such.
	10. Please see Section 7 for a complete answer to this question.	10. Section 7 is the ELL section. The CRC question relates to section 5, which is not addressed by the applicant's response.
	11. Technology is woven throughout the curriculum in a multitude of ways.	11. The CRC's comment is in reference to setting school goals or objectives related to

	Technology is seen as a tool and a process to be learned and utilized in conjunction with the appointed task at hand.	STEM, more so than how technology will serve as a tool.
	12. That was a mistaken error of omission on our part. On page 80, paragraph 5 should have read at the very least, "…will meet or exceed the District and /or State average (which ever is greater) of students who achieve a passing score (as established by FL-DOE) on the administration of EOC exams for all high school classes, and all high school classes taught at the middle school level…" Paragraph 6 should have also included the high school classes. If we are approved the charter will have amendments that reflect the need for complete goals for the high school level.	12. Again, the suggestion was made based on the criteria for this section, which includes that the application should specify " Measurable educational goals and objectives that set high standards for student performance." The applicant does not demonstrate a sound understanding of the high school accountability criteria and measures used to evaluate the effectiveness of a school's educational programs.
	13. Please reference the PDF document: highschoolgradrequirements for more information dealing with this question.	13. The referenced attachment does not list all of the required state assessments.

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	☐	☒	☐
Second	☐	☒	☐
Final	☐	☐	☐

Strengths
The applicant indicates an understanding of the school's obligation to admit and enroll students with disabilities (SWD) in a non-discriminatory manner. (Page 91)
The application identifies the level of ESE services to be provided at the school. (Page 91)
The school's procedures for ensuring compliance with Federal and state requirements for referral, evaluation and services for SWD are clearly identified. (Page 97 – 100)
The applicant's enrollment projections and projected staffing for the school's ESE program appear to be reasonable. (Page 101 – 102)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The staffing plan for ESE does not appear to be supported by the budget. (Appendix)** **The application indicates an ESE Liaison will be one of the most important positions to be filled. However, when reviewing the budget for ESE services there is only $7,500 for contracted services. Expectations of the School Community references incoming kindergartners, transitioning second graders. I.E.P.s will be reviewed from 1st to 2nd grade, 4th to 5th grade. However, there is no indication of IEP review at the High school grades of 9-12. (Page 92, 95, 106)**	1. The school board will request to the ESP that the funding necessary for the appropriate staffing for ESE personnel be put into the budget. 2. This was simply an oversight and IEPs will take place for high school grades 9-12. At the onset we were looking at a K-12 school. In the final analysis we decided on a 6-12 school. During the editing process we inadvertently forgot, or missed deleting all references to the early elementary grades. 3. The ESE Liaison will, if necessary, will provide part time Resource Room help	The response is inadequate. The board should not have to "request funds" from the ESP for necessary services. It is clearly the statutory responsibility of the board to control and manage the school's budget. The staffing allocation of one ESE liaison will be inadequate to meet the needs of the school.

The applicant proposes an inclusive model, but does not address the ESE needs of individual students. It refers to the ESE Liaisons as the individuals responsible for monitoring the instruction in the inclusive classroom. ESE is must provide for individual student needs based on their IEP. **The application does not refer to instructional data to be collected and used when making educational decisions based on student needs. The projections for the ESE population for appear to be high for the total school enrollment.**	for individual students on individual needs, and part time assisting in the regular classroom in the Inclusion setting. When the numbers and or budget allow there will be additional staff to assist with both the Resource Room and for Inclusion. Please refer to page 100 and 101… The school will provide a full time 6-12 ESE Liaison to manage the ESE program, documentation, and instruction, and training for students, staff and families of students with disabilities. In addition a certified 6-12 ESE teacher will be trained in the inclusion model. 4. Please refer to page 100 of the application under the heading of "Testing Results" 5. The projections for the ESE population (page 100) were based on the information given to us by officials with the Sarasota County Schools. We based our projections on said data, as outlined on page 100.	Additionally, certification requirements for the teachers to meet a highly qualified staff are of concern to the committee.

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(16)(a)(3)

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.
- Demonstrated a commitment to serving the full range of needs 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	☐	☐	☒
Second	☐	☒	☐
Final	☐	☐	☐

Strengths
This section is very thorough; although some revisions need to be made. Please refer to concerns listed below. (Page 109)

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

The committee requests additional clarification in order to fully meet the Standards for this area of application in the area of English Language Learners:
 	
A.
- **Program participation for a period up to six-years. (Page 110)**
  - o **There is no limit as to the number of years a student may receive services through the ESOL program.**
- **Students will be assessed in English within 20 days of registration. (Page 112)**
  - o **The Sarasota County District ELL Plan establishes a 10-day period for the language proficiency assessment of new students.**
- **OLPS as a language proficiency assessment. (Page 112, 115)**
  - o **OLPS is not the District's approved language proficiency assessment instrument. Refer to District ELL Plan.**
- **Composition of the ELL Committee. (Page 116)**
  - o **Description is too general as it lists the personnel who might be at the ELL Committee meeting. Refer to the District ELL Plan for specifics on the personnel required as part of the ELL Committee. Three 3 key staff members compose the**
	1. This is true, they may exit and re-enter at any time. We failed to put in the words, "or could remain in the program longer."
	2. "According to the District Plan the state requests a response to 6b) to show how the school will administer the test within 20 days." The county responded with a ten-day response. In our application page 111 reflects the 20-day response. This was an oversight and the school will follow the district plan. We will change that to reflect a 10-day response.
	3. Upon review of said assessment with the district ELL Plan, that error was recognized and ameliorated by putting in place the IPT.
	4. ELL Committee Chairperson, Administrator or Designee, Guidance Counselor, Parent or Parent Designee, ESOL Teacher, and other personnel as deemed appropriate (BSA Teacher, Social Worker, School Psychologist, Bi-lingual	

ELL Committee, and these 3 people must be present at ELL meetings. (Page 110)

- **Exit procedures (Page 112)**
  - ○ **Refer to District ELL Plan for approved exiting procedures based on established FLDOE timelines.**

B.

- **School offers on-site staff development for all staff to acquire ESOL endorsement. (Page 112, 115)**
  - ○ **Refer to District ELL Plan for State approved ESOL endorsement course information. These courses are offered in an on-line environment not as on-site courses. (Page 116)**
- **Teachers/Paraprofessionals assigned… expected to assist ELLs using their home language in core subject areas.**
-

The applicant is targeting the ELL population, but does not have in depth support regarding language acquisition to maximize student performance. (Page 110)

Please note that the Sarasota District schools deliver instruction in English using strategies to make content comprehensible since the ESOL program fosters the learning of English. Please be informed that the District's ESOL program is not set up as a bilingual program. Teachers may use the students' home language to explain a concept, only after all other ESOL strategies have been used. (Page 116)

If the charter proposes to use the district's ELL plan, then the applicant must become thoroughly familiar with the plan's procedures to ensure a complete understanding of ELL requirements. (Page 117)

The tests mentioned in the application are no longer the ones used by the district. (Page 117)

The statement "Students in grades K-12 who meet the eligibility requirements participate in the English for speakers of other Languages indicates see Appendix ELL for all guidelines on requirements". No

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Aide etc.) Required: ELL/LEP Committee Chairperson (ESOL Liaison/Contact), Administrator or the Designee, and Guidance Counselor.

5. The Exit Procedures are on page 115, not page 112. The exit procedures are basically the same except for the inclusion of the IPT. While the county specifies level 3, the application states at or above proficiency level in all areas.
6. After reviewing the statement regarding onsite and the district plan of offering the course on an online environment not as onsite courses, so corrections have been made.
7. We concur with the bulleted statement that teachers/paraprofessionals will <u>assist</u> the ELLs using their home language. They will not be teaching in the home language, it is not a bi-lingual program.
8. As per an ELL teacher at a local county school, their belief was that the in depth support is listed on page 110 is enough. Though not broken down, it does cover all areas.
9. That has been done, and we will be hiring a certified/endorsed ELL Liaison who will be fully aware and will fully implement the Districts plan.
10. Please see previous answers concerning Cella and IPT. There are no references to tests on page 116 or 117. We are not sure which pages you are referring to.
11. We were going to insert an appendix, however we cut that part, and in editing the reference was left out. We had been

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The committee has concern that the applicant has not adequately accounted for in depth support to maximize language acquisition for ELL student performance.

separate appendix was found.	told to not add an appendix.	

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)(n)

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, dismissal and recommendation for expulsion.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	☐	☒	☐
Second	☐	☒	☐
Final	☐	☐	☐

Strengths

The application describes several classroom management strategies to be implemented by teachers. (Page 119 – 121)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The application does not indicate that the school will implement the school district code of conduct, nor does it provide an alternative comprehensive code of conduct for the school. The application does not provide an**	1. Yes, the school will be using the district's code of conduct for students. While SCAE outlines in detail the code of conduct that is particular to and expected of SCAE students, and teaches with the CHAMPS module, the Sarasota County Code of Conduct is referenced	

adequate description of the school's code of conduct to ensure legally sufficient policies for student discipline, suspension, dismissal, and expulsion. (Page 119 – 125)	on page 124: "The Charter School will implement the Dismissal Procedures of Sarasota County Public School's Code of Student Conduct for Elementary and Secondary Schools as published by the Bureau of Special Programs, Division of Alternate Education, and Board Rule 6Gx13-5 D-1.08. The School will follow school board policy regarding withdrawals or expulsion." This reference by it's inclusion infers that we intend to use the counties code of conduct.	The Student Code of Conduct does not give criteria for revocation of student assignment to charter schools. The committee does not feel the applicant has adequately addressed the procedures for dismissal.

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(16)(5)(b)

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	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths
A description of the roles and responsibilities of the governing board is included in the application. (Page 128 – 129)
Parent dispute procedures are included in the application. (Page 133)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The application does not provide documentation of the proper legal structure of the board or a plan to organize in compliance with the laws of Florida. Board by-laws or organizational procedures are not included in the application. (Page 126)** **The identified governing board is small; only three members and collectively lacks the wide range of knowledge and skill needed to oversee a charter school. All board members appear to be educators and the board appears to have no knowledge or expertise in the areas of law, finance, business, etc. (Page 133)** **The roles of Anspaugh, Carreno, and Crowe are confusing. Are they to serve as administrators for the school, or board members? If they are to serve as administrators (or teachers, in the case of Carreno and Crowe), who are the board members?** **The governance section does not indicate the number of years Board members are to serve or the total number of Board members. (Page 126 – 133)**	1. Page 126. The proposed School will operate as a public charter school. Sarasota Charter Academy of Excellence will file for incorporation status with the State of Florida pursuant to Florida Charter School Statutes 228.056(7). The School has filed for Section 501 (C) (3) status as an non-profit organization under the IRS Code. Please see PDF attachment: By_Law_For_sarasota for more information. The board has appointed The Leona Group, L.L.C. who shall assist the board in managing the school, facilities and property of the School. The Charter School staff, Principal and Elective Vice President will work under the supervision of the board and Management Company. The board and the Leona Group, L.L.C. will hold the EVP and school leader responsible for the administration of its policies, the execution of Board decisions, the operation School programs, and for openly communicating with the Board regarding School operations and areas of concern.	This response concerns the Charter Review Committee. Regardless of the applicant's intent to use an Educational Service Provider, the applicant has a responsibility to present a properly qualified board possessing the range of knowledge and skills needed to oversee the operations and finances of the proposed school.

The board and the Leona Group, L.L.C. will seek highly qualified professional leaders for administrative positions within the School. The Leona Group, L.L.C. will work with the board and delegate authority to allow the school leader to put into practice set policies and procedures. The Leona Group, L.L.C. and the board will be responsible to train and oversee the EVP's administrative authority for properly discharging his or her professional duties, holding him/her responsible for acceptable results.

2. Page 133. Additional Board Members will be added as needed. The Leona Group has been contracted by the board to assist and provide a full array of services including expertise in the areas of budget and finance, human resources, academic support (including curriculum, student assessment, special education, grant writing and implementation), compliance reporting, communications and marketing, technology, special projects and risk management.

3. Anspaugh, Carreno, and Crowe are all board members for the Sarasota Charter Academy of Excellence. The founding board members do not have plans to be administrators or instructors at this school.

4. This information is found in the By Laws. Please see PDF attachment By_Law_For_Sarasota for more information .

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, selection and evaluation 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	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths
Job descriptions for the principal and teachers, including responsibilities and qualifications, are included in the application. (Page 134 – 141)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **Job descriptions for staff, other than the principal and teachers, are not included in the application. (Page 134 – 141)** **The application indicates that the management company (the Leona Group, LLC) will employ the principal but does not provide a sound plan for the recruitment, selection and evaluation of the principal. (Page 141)**	1. Please see PDF attachment for more information regarding job descriptions (jobdescriptions). More will be outlined before opening. 2. Leona group will work with the board to employ a highly qualified candidate to lead the Sarasota Charter Academy of Excellence. A Principal who shall enforce the statutes and regulations of the State of Florida and the policies	The committee is concerned the applicant's response does partially address the evaluation process, but does not address the recruitment and selection of a highly qualified staff. Additionally, some, but not all, job descriptions

The staffing plan provided in the application is inadequate to assess the school's ability to implement the educational program. The staffing plan provided does not identify the instructional, non-instructional, and administrative staff required for each year of the charter. (Page 141 – 142) **The committee could not determine from the number of teachers if the school can meet class size requirements.**	of the Charter Board. The Leona group and the Board shall evaluate the Principal, at least once each school year. The evaluations are public records subject to public disclosure. The evaluation shall relate to the Principal's duties, responsibilities, and progress on established goals. Any meetings of the Board to compile evaluations, or meetings to discuss the evaluations with the Principal shall be held in open session. Any Board member may meet individually with the Principal to discuss specific evaluation criteria. Board members shall have the opportunity to discuss with the Principal any item(s) on which the Board fails to achieve consensus. The Principal shall be given an opportunity to respond in writing to any evaluation criteria in which they are rated less than satisfactory. The Board and the Leona group will operate as governing partners and will ensure that the Principal has the training, support, and encouragement necessary to fulfill the charter. In addition, the Board will not only assess the principal but will also assess annually the performance of the Leona Group and will hold them accountable to the performance criteria upon which they mutually agree. The Charter Board is responsible for adopting policies that govern the School and the Principal is responsible for implementing those policies into action. The Principal will be directly involved in the daily operation of the School, and the Principal will report directly to, and be held accountable to the	have been provided to the committee for review.

	board of directors and the Leona Group. The Principal may delegate the necessary authority to other employees and develop necessary procedures to efficiently operate the School. The Principal is responsible for the direction and coordination of staff and students in their efforts to reach the School's educational goals. The Principal is expected to: · Specialize in the decision-making and communication processes. · Plan, organize, implement, and evaluate educational programs. · Develop and maintain close relationships with staff, parents, and the Charter Board. · Demonstrate educational leadership. · Provide all documentations to the district in a timely manner. 3. The School's initial staff will consist of the principal, certified educators, paraprofessionals and other faculty to meet the needs of the School. The School will work toward a goal to employ as many teachers as may be necessary to maintain a 1:22 student/teacher ratio in grades 6th – 8th and 1:25 for 9th-12th. Services such as maintenance and security will be hired as additional support staff. Grant money and other funding will be sought to enrich the curriculum but is not guaranteed. The following represents the minimum staff to employ: Administrative: Non-Instructional: Principal Cafeteria Personnel	The applicant's response does not provide the required detailed staffing plan, including instructional, non-instructional, administrative and support staff for each year of the proposal.

	Assistant Principal Office Manager ESE Specialists Data Entry Receptionist <u>Instructional:</u> Classroom teachers (All Reading Teachers will be Reading Endorsed) PE/Health Elective Course Teachers Computer Teacher Paraprofessionals Additional staff will be hired when an accurate enrollment number is determined and as needed. 4. The school will meet the class size requirements and normally will enroll a lower amount of students in each class and or section.	

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	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	☐	☒	☐
Second	☐	☒	☐
Final	☐	☐	☐

Strengths
The services to be provided by the proposed ESP are clearly defined in a management agreement between the school and the Leona Group Florida, LLC) (Page 145 – 149)

The respective roles and responsibilities of the Board and ESP are defined. (Page 163) |

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The applicant does not provide a persuasive explanation of the reasons for contracting with an educational service provider. The applicant does not provide any description of the process, including appropriate "due diligence" by which the proposed ESP (The Leona Group, Florida LLC) was selected. (Page 144, 161)** **The management agreement indicates that the school has "approved the Leona Group Florida's educational program". What is the Leona Group Florida's educational program and does it differ from the program described in the application?** **The management agreement indicates that the governing board and the ESP must agree on the school's budget, calling into question the board's statutory responsibility to be the final decision maker regarding the school's budget. What happens if the board and the ESP don't agree on the budget? (Page 145)** **The Educational Service Provider prepares the school budget and is to submit the budget to the school within 45 days prior to start of the new**	1. The Leona Group is a full-service education management organization, providing to its schools a comprehensive package of management services with a holistic approach to school success in mind. Academic success, fiscal responsibility and compliance with federal, state, and local regulations are at the forefront of The Leona Group's management objectives. To that end, The Leona Group provides a full array of services including expertise in the areas of budget and finance, human resources, academic support (including curriculum, student assessment, special education, grant writing and implementation), compliance reporting, communications and marketing, technology, special projects and risk management. The rationale for determining that the Academy has concluded to retain an ESP to assist the Board in operating the	The response is concerning to the committee because the applicant has not provided the required process, including "due diligence" used for the selection of an Educational Service Provider.

year. The school only has 10 days to respond with any needed changes. This appears to be a problem for adequate review and requested changes. The management fee does not include the cost to provide financial statements that are to be provided to the auditor. One would believe this cost would be included in the management fee. (Page 145, 150, 151 – 152)

The management agreement calls for the contract to be valid for the term of the charter and automatically extended at the time of charter renewal. The agreement can be terminated by either party with 60 day notice but can only terminated due to a "material breach" of the agreement by either party. This provision would appear to limit the board's authority to either: 1) operate the school without the services of an ESP or 2) utilize the services of a different ESP. (Page 146, 149 – 153)

The management agreement does not specify the fee for ESP services.

It appears that all staff of the school are employees of the ESP rather than the board.

The management agreement repeatedly references TLGF's curriculum, materials, and educational program. What are TLGF's curriculum, materials and educational program and are they consistent with the educational program described in the application? (Page 150)

The applicant identifies Dr. Bill Coats as the founder of TLGF but does not provide any information regarding the background and experience of Dr. Coats or any other senior management of TLGF. Additionally, the six schools in Florida currently operated by TLGF have grades of A, B, C, C and F, with one school having no grade listed. The proposed ESP also appears to have no experience or "track record" in Florida in operating high schools. (Page 151 – 152, 164)

Academy is to provide (i) expertise, (ii) experience, (iii) efficiencies, and (iv) economies of scale on both an operational and financial matters.

2. The Leona Group does not mandate a specific curriculum but works with the board and Leona's on-site staff to determine specific curriculum programs that meet state and federal standards. Leona's support staff assists by providing guidance on specific curricula and school improvement plans, as well as meeting academic measures and other requirements of No Child Left Behind. Curriculum development and implementation at the school is supported by the Quality Schools Initiative (QSI) team. Professional development costs for the staff, in support of curriculum development and implementation, are part of the annual budget with actual expenditures reviewed as part of the monthly expenditures report. Through this combination of site-based autonomy and collaboration with Leona's support staff, innovative and cutting -edge curriculum designs are created. These school programs are unique and responsive to the needs of the community, yet meet all the state and federal standards. The reference to the Leona Group Florida's educational program is boilerplate in the form template annexed to the application and that the educational program described in the application is the Board's educational

The applicant's response regarding the qualification of the ESP staff and the "track record" is inadequate.

"Boiler Plate" forms are concerning to the Review Committee. It is the responsibility of the

	<u>program developed initially with the assistance of Leona Group Florida.</u>	applicant to provide an application which meets the statutory requirements applicable to the district in which the application is being submitted.
	3. The referenced provisions are "procedural." Substantively, the Board is solely responsible for the budget and other aspects of the operations of the Academy. That said, the procedures are designed to assist the volunteer Board in developing a budget that will position the Academy and the Board to comply with applicable laws and regulation and meet the mandates of state and federal statutes applicable to funding, operations, grants and public fiduciary responsibilities. The consequence of a failure to have agreement between the Board and the ESP would be the ability of the parties to terminate the Management Agreement (see section 14.1), as in order to be an effective service provider the ESP and the Board need to be reasonably on the same page regarding the direction and finances of the Academy.	The committee is concerned that the applicant clearly understands that the management agreement cannot supersede the board authority for the school's budget.
	4. The provisions of the draft management agreement regarding the Budget are procedural. In response to this specific issue, the 10 days will be expanded to 30 or 45 days upon agreement of which number, which will have the procedural effect of moving the initial draft of a proposed budget forward by a month or so. The cost to provide statements provided to the auditor would be included in the management fee. The proposed budget is to the board and must be approved by June 30. Revised budgets	

are sent to the board 5-10 days in advance of board meeting. They are not required to approve it at that meeting. They can review and approve it at the next meeting.

5. The questioned provision will be modified to provide the Board the right to terminate the Management Agreement with or without cause at the end to the initial or any extended Term.

6. The fee for the ESP is 12% but may be reduced depending on enrollment.

7. Employment procedures are listed above under Human Resources. As employer of record, The Leona Group handles all recruiting, payroll, certification compliance, licensure and permitting, benefits and personnel matters for all school employees and also assumes responsibility for the complex and technical regulatory issues in human resources. This allows the school's board of directors to concentrate on governance issues and eliminates board liability relative to employment.

The Leona Group human resources department works collaboratively with the principal and the board to recruit, hire and orient new staff. The department utilizes various recruitment mechanisms including internal and external referrals, job fairs, strategic college and university recruiting, paid print and Web-based advertising and job postings. The department also maintains a Web- based

recruitment site that allows potential candidates to review open positions nationwide and submit resumes for consideration. The human resources department reviews employee qualifications and ensures that staff applies for appropriate permits and meet certification or licensing requirements. Criminal background checks, pre-employment drug screening and unprofessional conduct checks are also completed on all employees prior to hire. "Except as specified in this Agreement or as required by the Code or the Charter School Contract, the School Leader, teachers and support staff selected for the Charter School pursuant to this Agreement ("Charter School Employees") will be under the control and supervision of the Board through its authorized agents and representatives, but will be administratively employed by Leona Florida Employment Group, L.L.C. ("LFEG") an affiliate of TLGF which will handle the payroll, tax reporting, employment, and employee benefit aspects related to the Charter School Employees."

While not formally an "employee leasing arrangement" the elements of the relationship between the Board and LFEG are functionally equivalent, except that LFEG does not charge a separate fee for its services as those services are covered by the management fee paid to

	TLGF. TLGF, under the terms and conditions of the Management Agreement serves are the contractual "agent" of the Board charged with administering the operations of the Academy in accordance with the Board's duly adopted budget, policies and direction. The Board is, pursuant to applicable law and regulation, charged with operating the Academy and like all entity boards, it does so through its duly authorized agents, representatives and employees. 8. Please reference question 2 above. 9. A number of features distinguish The Leona Group from its contemporaries. Differentiating features and core values of Leona-managed schools include: • Dr. William Coats, The Leona Group's founder and CEO, is a lifelong educator and national leader in education reform • Founding philosophy that every child can and will learn and achieve • Prolific presence and demonstrated success in urban centers, serving a large population of economically disadvantaged students • Educational needs of children is the driving force behind operational decisions • Unparalleled Quality Schools Initiative supports intensive academic growth and achievement • Considerable site-based autonomy at the academy	

	• Organizational diversity • Competitive employee salary and benefit program along with a professional and innovative working environment • Comprehensive human resource services free the board from liability • Special needs students inclusively educated in the general education classroom with appropriate support, modifications and accommodations • School's reach out to the community as an integral component of the learning experience, developing ongoing and collegial relationships and partnerships that enhance the school's depth and provide rich experiences to students that go well beyond daily classroom instruction • Family participation is warmly encouraged and facilitated through a rich variety of programs and opportunities • Whenever possible, Leona strives for smaller class sizes and low student-teacher ratios that help facilitate one-on-one, personalized attention for every child in a safe, small-school environment Perhaps most notable of these characteristics is the fact that Dr. William Coats, The Leona Group's founder and CEO, is a lifelong educator who has worked to improve public education throughout his career as a school superintendent, university professor, foundation director and now as The Leona Group's chief executive officer.	

Dr. Coats is nationally recognized as a leader in education reform.

The entire leadership team is keenly sensitive to the educational needs of children and puts those needs first when making organizational decisions. While The Leona Group is aware that a business must be financially stable to endure, business is not the driving force behind organizational decisions. The Leona Group operates with "two bottom lines" —with the first and foremost being what is in the best interest of the children and families we serve.

Leona's unparalleled Quality Schools Initiative is indicative of Leona's steadfast resolve to provide every student with a high-quality, meaningful educational experience and promote academic excellence in schools. The Quality Schools Initiative has been lauded by educational colleagues, authorizers, consultants and reviewers from state departments of education as an innovative and highly successful approach to closing the achievement gap for students and facilitating ongoing improvement in Leona schools.

Considerable site-based autonomy is another significant distinguishing feature of Leona managed academies. Day-to-day operations, including decisions relative to curriculum and instruction, hiring of staff

and managing the school's budget are made by the school leader in collaboration with the board's vision. This allows the school to be most responsive to the unique needs of the community, students and parents it serves and make decisions in the best interest of these groups quickly and efficiently.

Individualized attention, high expectations in schools and behavior, a safe, nurturing environment, and strong focus on parent participation, are also key attributes of every Leona managed school. Students leave with a solid foundation for learning, taking their first steps toward a lifetime of success. Our goal is for each one of our students to graduate well prepared for his or her next step in life. Whatever they choose, we want them to thrive as individuals as well as members of their families and communities. Higher education is presented as an attainable goal and the academy works deliberately to plant early seeds that encourage this pursuit. Dr. Coats has a very deep and impressive resume that should be provided in response to request for clarification. Ms. Gallagher or Ms. Cook should be able to provide assistance, but our website provides this brief one:

"William (Bill) Coats, Ph.D., has worked to improve public education throughout his career as a school superintendent,

university professor, foundation director and now Chief Executive Officer of The Leona Group, L.L.C.

As superintendent of public school districts across the nation, he worked within the system to allow parents freedom and choice within the schools, empower teachers and staff, and promote the idea that all children can learn. Bill has worked with the W.K. Kellogg Foundation as coordinator for youth programs, and as public schools superintendent in Fort Wayne, Indiana; Anchorage, Alaska; Grosse Pointe, Michigan; and Kalamazoo, Michigan. He was chairman of the Department of Educational Leadership at Western Michigan University and served as full professor in the College of Education at the University of Michigan.

Bill holds a master's degree in educational psychology, and a doctorate in research design and data analysis in education from the University of Michigan. He has served as a consultant for educational systems and businesses and has published extensively in journals, trade publications and newspapers." TLGF does not have a "track record" in Florida at the 9-12 level. Affiliates of TLGF have very substantial and successful track records in operating high school level academies in Arizona and Michigan.

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	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths
Benefits to be offered to full time employees are described and appear to be reasonable. (Page 169)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The committee is unclear as to if the employees are publicly or Privately employed?** **Please specify how the applicant will recruit personnel?** **Professional Development appears to be extensive without clear resources listed.**	1. The employees are intended to be private employees and would not participate in the Florida Retirement System, but would be provided a benefits package that includes a 401(k) plan with % matching employer contributions funded by the Academy. 2. The Charter School believes it has the obligation to employ the best qualified administrative personnel and teachers available regardless of race, color creed,	The Review Committee feels the professional development activities listed by the applicant are inadequate to meet the lengthy list of strategies and methodologies proposed in the application. Many of these methods require extensive training and the professional development activities listed in the plan are significantly lacking in time and funding necessary to successfully implement each approach.

The application does not appear to include even a draft salary schedule to allow for an informed assessment of the school's potential to attract and retain highly quality staff. (Page 166)

While some brief personnel procedures are provided in the application, it is difficult to understand, since the ESP is operating other charter schools in Florida, why at least a draft of the school's personnel procedures would not be included. When, and by whom, will the school's personnel procedures be developed? (Page 166 – 171)

Please specify how, and under what circumstances, the school would consider utilizing non-certificated personnel in instructional positions. (Page 166)

There appears to be a major "disconnect" between the Professional Development Plan included in this section and the school's proposed educational program. Some items referenced in the PD plan (e.g. Success Maker, Core Knowledge) do not appear to be part of the school's educational program, and many key components of the school's program (e.g. authentic learning communities, STEM instruction, project based learning, an Holistic Approach to the Whole Child, the Constructionist approach, arts-based curriculum, team teaching, interdisciplinary thematic learning, Marzano learning strategies, etc) are not addressed in the school's PD plan. (Page 171)

The professional development section includes participation in National conferences and subsidizing continuing education. The total budget for professional development is $1,600. This appears to be low for what may be an aggressive professional development plan.

sex, national origin, age or handicap. Recruiting Activities include but are not limited to:

·   Recruitment events with onsite hiring of high qualified candidates;
·   provide presentations to education majors currently doing their student teaching internships;
·   Attend education and general career fairs locally, in state and nationally;
·   Web-based Ulti-pro Recruitment software

When the School declares a position open, the Principal will advertise the position in local newspapers, all schools, administrative offices, websites and appropriate university placement offices. The opening will be advertised for a minimum of two (2) weeks and in case of multiple openings, an applicant interested in more than one position will submit a resume for each position to the Principal.

Determination of the personnel need of the School will be the responsibility of the Leona Group and the Board. Recommendation to hire a teacher or administrator will not be made until a personal interview with the candidate has been conducted and at least three references have been conducted by the interview committee. The committee consists at a minimum of the Principal, one teacher, and the Administrative

	Assistant. The Principal or his/her designee will verify that persons nominated for employment meet all qualifications established by the applicable state laws, rules of the Florida Department of Education and School Board policies for the type of position for which the nomination is made. The School will not knowingly employ an individual who has resigned from a school district in lieu of disciplinary action with respect to child welfare or safety or who has been dismissed for just cause by any school district with respect to child welfare or safety. 3. The school will budget a certain amount of funds for professional development based on enrollment, number of faculty members, and needs of the school and faculty. 4. Please see attached PDF File: Sarasota_staffing for the answer to this question. 5. A draft of the school's personnel procedures are located in the Employee Handbook. Please see Employee_Handbook_05.pdf. 6. The school does not plan on utilizing non-certified personnel for instructional positions. The school would only use non-certified personnel in an emergency situation and only for a minimal amount of time. For example, if an instructional person is terminated, a non-certified person may be hired to substitute until a highly qualified candidate is selected.	

	Obviously, this would be a last resort. 7. The teacher induction program is an annual event of inservice that takes place before each school year begins. The overall general educational program including topics such as STEM Instruction, Project Based Learning, the Holistic Approach to the Total Child, the Constructivist Approach, Team Teaching, Interdisciplinary Teaching, Marzano's Learning Strategies, etc., are presented via in house professional development via administrators and seasoned teachers. This professional development continues throughout the first several weeks of school to reinforce the knowledge or learning of all teachers or teaching professionals. 8. As previously stated, the funding for professional development and all other line items will be adjusted accordingly once the actual enrollment is determined. The professional development amount will be based on enrollment, size of the faculty, and the needs of the school and faculty.	

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	☐	☒	☐
Second	☐	☒	☐
Final	☐	☐	☐

Strengths
The marketing and recruiting activities included in the application appear to be reasonable. (Page 172 – 173) The school's procedures for admission and enrollment, including the provision of a lottery if applicants exceed enrollment capacity, appear reasonable and in compliance with statutory requirements. (Page 173 – 174)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: Of great concern is the lack of any reference to plans and efforts to communicate and recruit ELL students. What strategies will the school use to communicate and reach out to non-English speaking parents? Will materials and information be provided in other languages? Will the school "market" its program focus on ELL? Given the school's stated emphasis on services for ELL students, why does this section not at least include additional and targeted marketing and recruiting activities to ELL students and families? (Page 172 – 173) As noted in Section 8, the application does not contain an adequate description of the school's code of conduct to ensure the statutory compliance of its procedures for suspension, expulsion or dismissal of students. (Page 174 – 175)	1. We have realized that the most effective way to recruit ELL students is by word of mouth, ergo the administration coupled with staff that are Spanish speakers meet with the Spanish Chamber of Commerce and Churches, attend Hispanic Community events where bi-lingual power point presentations are made with a follow up question and answer period. Moreover leaflets in both English and Spanish are disseminated to all attendees. Other minority groups of all languages will be like presented. We will offer materials in Spanish and other language needed. Will the school "market" its program focus on ELL? The school will have a full array of marketing approaches and materials to advertise the school, it's programs, and the focus. Given the	Although the applicant lists ideas for recruiting, what has been submitted for review lacks detain and specificity for a plan.

	school's stated emphasis on services for ELL students, why does this section not at least include additional and targeted marketing and recruiting activities to ELL students and families? (Page 172 – 173) The Leona Group and the Board will create a marketing plan which will include the school's programs, focus, and will develop additional marketing strategies to target additional ELL students as needed. 2. The Board plans to use the Sarasota County Code of Conduct.	

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	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths
The applicant demonstrates an awareness of class size requirements. (Page 176)
The applicant identifies the North Port area as the preferred site for the school.

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: The proposed school location of the North Port may be problematic. North Port is losing more student enrollment than other areas of the county. The assumption that North Port is still growing is flawed. Our latest projection is for a decrease of 321 students in North Port including the current charter school. (Page 176) The application lacks detail with regard to the plan to acquire and finance a facility. An estimated square footage requirement and estimated cost per square foot (based on market rates in the designated area) would be helpful in assessing the fiscal viability of the facility plan. (Page 177)	1. The board discussed possible locations and needs with the director of charter schools prior to submitting the application. The board is open to other suggested locations from Sarasota County. 2. The start up grant for charter schools will be applied for along with capital money supplied by the ESP and upon the identification of a final facility the academy will arrange for a landlord and third party capital support for the initial build out, if any, of the facilities and the acquisition for leasing of all required furniture, fixtures, and equipment for the program.	The applicant has not submitted a facility plan as required.

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)(a)(1)

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	☐	☐	☒
Second	☐	☒	☐
Final	☐	☐	☐

Strengths

The applicant demonstrates an understanding of the school's obligation to provide transportation services to students living within a reasonable distance of the school. (Page 179)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The committee is concerned that:** **1) The contract only addresses 2-3 state laws. Several state and federal requirements are not addressed.** **2) A procedure for reporting to the Transportation Department and School Board of Sarasota County is not addressed.** **3) Vendor liabilities are not reasonable.** **4) The transportation area is not defined.** **5) A budget for transportation services is not included.** **Since the applicant indicates that the school may use private vendors or parents to provide transportation services, this section should be carefully reviewed for compliance with state and local requirements. (Page 179 – 182)** **Paragraph one indicates that transportation services may be provided by the school board, <u>a private provider, or parents</u> (SCAE's underlines), but paragraph 3 indicates that the school will contract transportation through a**	Upon reflection, we will use the County Transportation System. Sarasota Charter Academy of Excellence will plan the transportation of all students who reside within a reasonable distance, consistent with the requirement of Chapter 234.1006, Florida Statues. Reasonable distance will be within 2-4 mile radius of the school. All students inside that area shall have a right to free transportation.	It is unclear whether the applicant intends to contract with the school district or Sarasota County for transportation service. A budget for transportation service has not been provided to the Charter Review Committee.

private provider. The applicant is unclear as to the actual plan. (Page 179)		

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	☒	☐	☐
Second	☒	☐	☐
Final	☐	☐	☐

Strengths
The applicant recognizes the need to provide a food service program for the students. (Page 183)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **Since the applicant intends to contract with private vendors for food services, this section needs to be carefully evaluated by for compliance with federal, state and local requirements. (Page 183 – 185)** **SCAE plans to operate its own child nutrition program. SCAE plans to ask vendors to respond to an RFP to provide services. More information is required upon completion.**	1. The School will make a public media announcement upon notification that the application is approved by Sarasota County and send emails to Food Service vendors for contracts, open bids. The governing board will meet with all the vendors interested in offering their food service to the school with the purpose of answering any questions about the services provided to the school. All vendors will have a deadline to respond to a Request for Proposal (RFP) Once	Information on umbrella qualification for NSLP under Leona Group Schools needs to be clarified and evidence provided. Please be aware that Sarasota County Public Schools Food and Nutrition Services will not respond to an RFP for food service.

	the school has received the bids from all food service vendors, the governing board will read the bids in front of witnesses. The decision will take place during a board meeting after. The minutes will be recorded. Announcements will be made in the local newspaper and flyers will be provided. The school will automatically qualify for the National Lunch Food Program under one of the other Leona Group schools. The School will apply for it's own National School Lunch program. A percentage of Leona school's in Florida and in other states contract with Preferred Meal Systems which complies with all federal, state, and local requirements. 2. (see above) specific additional information can be submitted upon request.	

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.

CRC Rating	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Preliminary	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths

Required budget forms are included in the application appendix. (Appendix, Start-Up Budget)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **Since the budget does not contain a per teacher cost, it is impossible to evaluate the adequacy of the budget to fund the staff necessary to support the school's instructional program. (General Fund Budget)** **The contracted services amount of $7,500 for ESE related services (i.e. speech, OT, PT, etc.) would provide approximately 3 hours of service per week and is probably inadequate. (General Fund Budget)** **The "other purchased services" line item in the budget is not identified. Is that the ESP management fee? If so, it needs to be identified as such. (General Fund Budget)** **The contracted services expenditures for transportation and food services do not appear be included in the budget. (General Fund Budget)** **School lunch and breakfast revenues and before and after school care fees appear to be included in the general revenue estimates for the school. This is in violation of Federal and State guidelines. (General Fund Budget)** **The start-up budget identifies an $85,000 loan from the ESP to cover startup costs, with loan repayments included in the first year budget projections. However, those costs do not appear to be included in the first**	1. Please see PDF attachment: Sarasota_staffing for a complete answer to this question. 2. The funding will be adjusted based on actual enrollment numbers and the needs of the school and students. 3. It is explained in the narrative. In function 7500 it is 12% management fees. 4. We did not put transportation fees in. I think we talked about it and determined this school may be more urban and not need transportation. We put a budget in for food service, but we put the cost in Food instead of Purchased Services. If we are to contract with a vendor, we will change it to purchased services. Either way the cost is accounted for. 5. When the school is opened, we can easily set up "Special Revenue" section of the budget as we do for other schools. This was a more concise way to set it up and the format didn't indicate they wanted a separate fund budget. This was an error in accounting due to the fact other districts in Florida and other states did	The revised information as submitted would present conditions that would place the school in a financial emergency under current state statute. The applicant has not provided a realistic budget for the school.

year budget. (Start-Up Budget, General Fund Budget)

Funding for the Read 180 program is not reflected in the budget. (Appendix)

There was no DOE Charter School Funding worksheet provided to allow for an evaluation of the revenue projection that was provided. In the subsequent years section 2 indicates the student population will be 2013-14 308 students, 2014-2015 396 students, 2015-2016 506 students, 2016-2017 594 students. The proposed budgets in the budget section are less than what is in section 2. The proposed budget for 2012-2013 in section 17 indicates an ending fund balance of $8,384. This is 6 tenths of a percent. The cash flow for 2012-2013 indicates a balance of $60,823.73. The two statements should balance. The cash flow summarizes expenditures differently than the budget by object. This does not allow for identification of where the error has occurred. The budget indicates the salaries are forecast using guidance from published pay scale in effect. When computing the salaries they are not from the Sarasota County School Board scales. For example the Principal, Chief Financial Officer, and Executive Vice President of Operations total budget is $110,175. This would be an average of $36,725 each. (Page 186 and Tab 21)

The teachers are calculated based upon approximately $29,000 each. All of these salaries are far below the current charters.

not require the way requested. The accounting office with Leona responded to the question, and will make adjustments.

6. Repayment is indicated in the cash flow, but we do not include loan repayment in the budget for short-term loans. It is on the balance sheet only. For long-term debt we would add an expense for redemption of principle.

7. We will be writing grants for this item, in addition we will be adding it to our start up grant application.

8. These are different student counts than I used in the budget. I used the revenue calculator and am attaching the entire budget so you can look at the funding pages. (From Leona's Accounting Office) Please see Budget pages for funding. Cash flow and budget do not balance because we accrue the two July pays and benefits, which appear in the budget – not in the cash flow.

9. From Leona's Accounting office: I didn't have access to any pay scale. I used the normal TLG estimates. I don't know how we can explain this if it was in the narrative. We will be adjusting this budget to reflect the actual pay scales in the Sarasota County area.

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	☐	☐	☒
Second	☐	☐	☒
Final	☐	☐	☐

Strengths
The application identifies the required insurance coverage for the school. (Page 191 – 192)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Commnets
The committee requests additional clarification in order to fully meet the Standards for this area of application: **This section should be reviewed for compliance with state and local requirements. (Page 190 – 192)**	The board with the assistance of the Leona Group, L.L.C. will oversee the financial transactions for the school. The School will employ a controller to manage bookkeeping, bank reconciliation, and payroll. Detailed financial statements will be prepared on a monthly basis for analysis by the Governing Board. Policies and reporting procedures established by the District and State will be followed. The School will maintain a number of internal financial controls and bookkeeping practices. Internal controls will be reviewed and evaluated annually by an independent auditor in accordance	The applicant has not presented a plan that appropriately safeguards financial management, a system of checks and balances or accepted financial practices.

with generally accepted audit standards. All monies will be deposited into FDCI insured banks. All cash collected on campus will be managed by an Administrative Assistant who will follow written internal cash flow procedures as determined by the Board.

The Principal will manage the day-to-day operations and site-based finances. The Board will adopt a policy whereby the Principal will need to seek prior approval from the Board for expenditures over a pre-approved amount. The Governing Board will oversee the Principal and remain responsible for all financial matters delegated to the Principal.

An accounting firm, contracted by the Board of Directors, will assist the School with the start-up requirements for setting up appropriate accounting procedures and controls. The School will develop a written internal audit procedure and establish controls to ensure that financial resources are properly managed.

The School will utilize accepted state coding of accounts pursuant to the Financial and Program Cost Accounting and Reporting for Florida Schools in all transactions pertaining to its operations. The School will prepare quarterly financial statements, and annual, audited financial reports that include a statement of revenues and expenditures prepared in accordance with generally accepted accounting principles.

The Charter School's financial management and internal accounting processes will be set up in

accordance with the Department of Education and the Sarasota County procedures. In the event the State or District changes to a new accounting and reporting system, the School will adopt the new standards. All requested reports will be forwarded to the School Board in a timely manner.

The School will utilize accepted state coding of accounts pursuant to the Financial and Program Cost Accounting and Reporting for Florida Schools in all transactions pertaining to its operations.

The School will prepare financial statements, and annual audited financial reports per state requirements that include a statement of revenues and expenditures prepared in accordance with generally accepted accounting principles.

The Charter School will submit to the District and pay for an annual financial audit in compliance with federal, state, and school district regulations showing all revenue received from all sources, and all expenditures for services rendered. The fiscal audit shall be conducted by an independent certified public account selected by the Governing Board of the Charter School and will be delivered to the District within 90 days following the end of the district's fiscal year.

Sarasota County's internal auditors or external auditors may request review and inspection of books and records. In addition, any inquires related to accounting information obtained from quarterly reports and year-end audits will be

	addressed by the School's administration. The Charter School will comply with the provisions of the Family Educational Rights and Privacy Act (FERPA) and IDEA in the establishment, maintenance, correction, and disposal of student records. The right to inspect and review educational records and the release of information, or instructional materials will be consistent with federal and state law. All student and financial records will be protected and stored in a secure fireproof and waterproof cabinet. In addition, backup copies of all records will be stored on servers. Student records are official and confidential documents protected by Florida Statute 1002.22 and the Federal Family Educational Rights and Privacy Act (FERPA) and will be treated as such. As set forth in Florida Law, chapter 2006-190, the school shall meet all applicable state and local health, safety and civil rights requirements. A description of procedures that identify various risks and provide for a comprehensive approach to reduce the impact of losses; plans to identify, minimize, and protect others from violent or disruptive student behavior; and the manner in which the school will be insured, including whether or not the school will be required to have liability insurance, and, if so, the terms and conditions thereof and the amounts of coverage. The School will comply with requirements specified by Sarasota County or applicable state statutes regarding insurance and liability coverage.	

The School will maintain appropriate Commercial General Liability Insurance, Automobile Liability Insurance, Workers' Compensation Insurance and Professional Liability Insurance. Evidence of insurance will be provided by the School to the Sponsor before the initial opening day of classes. Limitations on policies will comply with state statute and the Charter School Agreement as follows:

- Workers' Compensation/Employers' Liability at $1,000,000 per occurrence/$2,000,000 annual aggregate
- School Leader's Errors and Omissions Insurance at $1,000,000 per claim/annual aggregate
- Fidelity Bonds shall not be less than $1,000,000
- Commercial General Liability Insurance at $1,000,000 per occurrence and a $2,000,000 annual aggregate
- Business Automobile at $1,000,000 limit per occurrence, and, if subject to an annual aggregate, $3,000,000 annual aggregate
- Employees Liability Insurance at $1,000,000 per disease, accident and employee
- Directors and Officers Insurance
- Property Insurance
- Employees Health Insurance

Where applicable, Sarasota County will be named as an additional insured. The Charter School shall, at its sole expense, maintain current policies throughout the entire term the Charter.

The budget and spending priorities are developed to ensure that the maximum amount of funding goes directly to items related to the best

	instruction and academic program for our students. Expenditures will be prioritized to develop and maintain a highly qualified staff and to provide a safe and appropriate learning environment.	

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	☐	☒	☐
Second	☐	☒	☐
Final	☐	☐	☐

Strengths
An action plan is submitted in the application, identifying the major tasks to be accomplished in preparation for opening the school including the dates and person(s) responsible. (Page 193)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response	CRC Review/Comments
The committee requests additional clarification in order to fully meet the Standards for this area of application: **The "readiness checklist" on page 194 does not include dates or persons responsible for each task. (Page 194)**	1. The Checklist on page 194 is the responsibility of the School Leader. These tasks, will begin the day after the charter application is approved by the District. All of the checklist will be completed before the beginning of the	Applicant has not provided the requested timeline for the action plan to open the school.

The action plan identifies several tasks as the responsibility of the school principal prior to startup funding being available to support the principal salary. How will these tasks be accomplished without funding? (Page 193, Start-Up Budget)

Who is responsible for the tasks listed on the "School Readiness Checklist"? What are their projected dates to accomplish them? D (Page 194)

The committee suggests adding a timeline to perform an RFP for food services and to apply to DOE/DOACS for NSLP eligibility, as this process can take a number of months.

new school year.

2. TLG advances the funds and it is set up through a "contracts payable" classification. Even though TLG pays, it is charged to the new school. When there are funds available, TLG will start transferring some money back at no interest.

3. The ESP will provide said funding, which will be reimbursed by the school when the money from the State is dispersed in July and August prior to the opening of school.

4. The school will automatically qualify for the NSLP under one of the already approved Leona schools in Florida. The School will make a public media announcement upon notification that the application is approved by Sarasota County and send emails to Food Service vendors for contracts, open bids. The governing board will meet with all the vendors interested in offering their food service to the school with the purpose of answering any questions about the services provided to the school. All vendors will have a deadline to respond to a Request for Proposal (RFP) Once the school has received the bids from all food service vendors, the governing board will read the bids in front of witnesses. The decision will take place during a board meeting. The minutes will be recorded. Announcements will be made in the local newspaper and flyers will be provided. The school will apply

	for it's own National Lunch Food Program as well.	