

**Sarasota County Public Schools
 2017 – 2018 Charter School Application Process
 Charter Review Committee (CRC) Analysis and Initial Findings – September 28, 2017**

Sarasota STEM Academy Charter Application

This document provides the Charter Review Committee’s (CRC) initial findings based on their review and analysis of the application submitted to the district on August 1, 2017. The CRC feedback is divided into three categories: 1) Strengths, 2) Deficiencies/Concerns/Weaknesses, and 3) Areas in Need of Additional Information and/or Clarification. The CRC is offering the applicant an opportunity to respond to the “Areas in Need of Additional Information/Clarification.”

A summary of the CRC’s initial ratings by program area is provided below.

Charter Review Committee Preliminary Ratings Summary for Sarasota STEM Academy

I. Educational Plan Standards 1 – 9	II. Organizational Plan Standards 10 – 15	III. Business Plan Standards 16 – 22	Addendum B: Education Service Providers	Preliminary Total
11% Meets 56% Partially Meets 33% Does Not Meet	33% Meets 67% Partially Meets 0% Does Not Meet	43% Meets 28.5% Partially Meets 28.5% Does Not Meet	0% Meets 0% Partially Meets 100% Does Not Meet	26% Meets 48% Partially Meets 26% Does Not Meet

Note: Due to rounding, percentages may not add to 100%.

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Dear Charter Applicant:

This document provides the Charter Review Committee’s (CRC) initial findings based on their review and analysis of the application submitted to the district on August 1, 2017. The CRC feedback is divided into three categories: 1) Strengths, 2) Deficiencies/Concerns/Weaknesses, and 3) Areas in Need of Additional Information and/or Clarification. The CRC is offering each applicant an opportunity to respond to the “Areas in Need of Additional Information/Clarification.” This clarification process may not be used to submit new information (not requested) or make substantive changes to the submitted application.

Please use this document to submit your responses to the items under “Areas in Need of Additional Information and/or Clarification” and adhere to the following guidelines:

- Use the column labeled “Charter Applicant’s Response” to address the questions and requests for clarification listed.
- Please respond briefly and succinctly to the specific information requested in each section of the application.
- Do not submit information that is not requested.

Do **not** respond to the remarks under “Deficiencies/Concerns/Weaknesses.” Based on the CRC’s evaluation, the weaknesses, deficiencies or missing information identified in the application are considered sufficiently significant that corrections and revisions would constitute a material or substantial amendment to the original application. Therefore, please do not enter information in this box.

The completed document must be submitted electronically to the Office of School Choice and Charter Schools no later than 12:00 noon on Wednesday, October 4, 2017. Also provide 6 hard copies of the document. Please follow the directions provided on the cover letter regarding format, number of copies, etc. when you submit your revisions. If you have questions, call (941) 927-9000, ext. 32262.

Florida Charter School Application Evaluation Instrument

The following definitions guided the CRC’s ratings:

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

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)

Evaluation Criteria:

A response that meets the standard will present:

- A clear and compelling mission and vision statement that defines the guiding principles and values of the school.
- Adequate references to evidence that the application fulfills the statutory guiding principles and purposes for charter schools. (Note: the substance of each addressed principle and purpose will be evaluated within appropriate application sections.)

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

Strengths (reference page numbers)
<p>Information Only: The Sarasota STEM Academy charter school plans to offer a STEM program for Pre-K to 8, with a marine science focus. (P. 6) The proposed school will be located at 930 N. Beneva Road, Sarasota.</p> <p>The school will implement a Google Platform to utilize Google Educational Tools. (P. 8)</p> <p>The management company, Alliance Educational Services, Inc. (AES), will offer effective and relevant professional development to teachers and staff. (Pp. 9-10)</p> <p>As part of their job responsibility, teachers will offer before/after school tutoring at no charge to parents. Using a specialized curriculum, teachers will work in small group settings to provide targeted interventions to address students’ deficiencies and reduce the achievement gap. (P. 12)</p>

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The applicant claims that they have existing and ongoing partnerships with Mote Marine, Riverview High School, and the Bobby Jones Country Club. References to such partnerships are referenced throughout the application. However, no evidence or letters of commitment are provided to support this claim. (Pp. 7, 9, 10, 26, 46, etc.) Please note that the individual who provided a letter from Riverview High School, indicating the school's commitment to provide resources to the proposed charter, did not have the authority or consent from the school or district to endorse the proposed charter school.

The mission, guiding principles and purpose of the school shifts between STEM and STEAM throughout the application. The governing board of the school will contract with an ESP, Alliance Educational Services, Inc. (AES), to manage the school. In the application it states that AES is “committed to the STEAM mission of the Sarasota STEM Academy. (P. 127)

The application template requires the applicant to indicate the page number(s) of the material within the application that describes how the proposed school will utilize the guiding principles found in section 1002.33(2)(a), F.S. Although the narrative and verbiage on the referenced pages correspond to the topic, the responses for each addressed principle and purpose lack substance, are broadly stated and lack essential information. Furthermore, information presented in other sections of the application are not in line with or lend little support that Sarasota STEM Academy, as presented in this application, fully adheres to the charter school's stated guiding principles or the purpose for charter schools specified in state statute. (Pp. 12-13) The CRC's findings reported for each section support this conclusion.

In accordance with the law, charter schools shall be guided by the following principles:

Weak Evidence that the school will- Meet high standards of student achievement while providing parents flexibility to choose among diverse educational opportunities within the state's public school system.

Weak Evidence that the school will- Promote enhanced academic success and financial efficiency by aligning responsibility and accountability.

Acceptable support that the school will- Provide parents with sufficient information on whether their child is reading at grade level and whether the child gains at least a year's worth of learning for every year spent in the charter school.

In accordance with the law, charter schools shall fulfill the following purposes as per 1002.33(2)(b), F.S.:

Weak Evidence- Improve student learning and academic achievement.

Acceptable- Increase learning opportunities for all students, with a special emphasis on low-performing students and reading.

Weak Evidence- Encourage the use of innovative learning methods.

Weak Evidence- Require the measurement of learning outcomes.

Comment Only: The school's claim that STEM is innovative and a “unique educational option” is not supported. All of Sarasota County's middle schools are STEM schools with Tec Active Technology, and two elementary schools have a science focus designed to feed into the middle school programs.

Additionally, several schools in Manatee County (included in target population) are STEM schools.

Areas in Need of Additional Information and/or Clarification <i>(reference page numbers)</i>	Charter Applicant's Response
Please clarify what is meant by “develop a Florida approved VPK program.” (P. 8)	
Please be advised that Sarasota does not use a Google platform, and plan accordingly. (P. 8)	

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)

Evaluation Criteria:

A response that meets the standard will present:

- A clear description of the students the charter school intends to serve including any target populations in accordance with Florida law.
- Alignment of the targeted student body with the overall mission of the school.

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

Strengths (reference page numbers)

Information Only: The Sarasota STEM Academy will be located on North Beneva, south of 17th, just North of Fruitville. The applicant has completed site permitting and review committee meetings with the city. (P. 15)

Information Only: The school plans to open with 714 students in VPK to grade 6 the first year, adding grades 7 and 8 in the next two years, for a total enrollment of 890 by year 3. (P. 15)

The applicant recognizes that a higher proportion of minority, economically disadvantaged, and “high needs” students reside in the areas surrounding the school. However, the percentages of economically disadvantaged quoted in the application are county-wide for Sarasota; percentages will be higher in the areas surrounding the proposed school. (P. 13, 15)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The primary rationale presented to support the anticipated population of students is population growth in Sarasota and limited choice options. (Pp. 13-16) Other than offering STEM, there is no clear description of how the target population of students to be served aligns with the school’s mission.

Overall, the application does not provide a clear description of the student it intends to serve. The application references demographic data at both the district at large and the surrounding school community as a description of the student population. Rationale for projected enrollment

is unclear and/or based on speculation and in some cases based on inaccurate information. Contradictory information about the student population is presented in different sections (e.g., p. 51) of the application.

The school is projected to have an enrollment of 890 by year 5 of operation. The applicant informed the City of Sarasota that it plans for 1,400 K-8 students. (Community Workshop held on April 25, 2017)

The application states that there are limited school choice options in north Sarasota and states that “the school is designed to meet a growing need for seats, a growing demand for school choice...” – in fact, there are 16 schools within the 5-mile radius in Sarasota: 3 charter schools and 13 traditional schools in the area surrounding the location of the proposed school. (Pp. 13, 15)

The application states that no options for a STEM focused program are available to students in the areas. (Pp. 13, 15, 16) In fact, all of Sarasota County Middle schools are STEM Tec Active Schools. Bay Haven and Wilkinson have a STEM focus. In addition, a couple of schools in Manatee County are STEM schools.

References are made to partnerships in the community, such a Mote Marine, Bobby Jones Country Club and Riverview High School, yet no evidence of such community support is provided. The applicant did not provide any support for need and demand on the part of the parent or school community. (P. 14)

The school references ELL and ESE percentages for the county as a whole, yet states it will mirror the population of the surrounding schools and community, as well as the schools within the 5-mile radius. The applicant’s anticipated percentages of 11% ESE and 7% ELL students are unrealistically low and do not reflect the population of students in the surrounding area. Within the 5-mile radius, enrollment for ESE students is about 18% at the elementary level and 22% at the middle school level; ELL enrollment is approximately 16% and 6% at elementary and middle schools, respectively. With one exception, these numbers are significantly higher than what the applicant may anticipate which will negatively impact the school’s staffing plan and budget. (P. 14)

The explanation and rationale for the projection methods used to develop the enrollment counts is not sufficiently detailed to determine if the projected enrollment is realistic. The applicant references Sarasota’s population density and growth as the rationale. (P. 13, 16)

The application does not fully address the question regarding the rationale for the number of students at each grade levels in year one and in the subsequent operational years (as shown in the table on page 15). The application states that the “great need and demand for STEM-related education” is support for the anticipated grade level enrollment projections for each year. (P. 16)

It is unclear if the school will limit the enrollment process to target a specific population of students, as permitted by 1002.33(10)(e). One option (4) is limiting enrollment to “students residing within a reasonable distance of the charter school.” The applicant proposes to serve students who live within a 5-mile radius of the school, yet references anticipated student populations and describes demographics well beyond the 5-mile radius. (P. 16) In Section 14 the application states that the school is open to all eligible students in Sarasota and Manatee counties, beyond the 5-mile radius. (P. 101)

Another reference to the “Arts” in STEAM. (P. 17)

The narrative provided on page 17 does not address the question as to the basis for the enrollment growth plan proposed in the application. (P. 17)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
It states that the enrollment projections were developed based on actual projects in geographical areas similar to the one proposed for the school. (P. 16) Please provide an example of such project.	
Does the school intend to limit the enrollment process as defined in 1002.33(10)(3)4 F.S., to students residing within a 5-mile radius of the school? (P. 16) Please declare your intent.	
What number and percent of Manatee County resident students are expected to enroll in the school?	
Please clarify the meaning of the statement on page 15 that reads: “The school will follow the school district of Sarasota County’s SPP along with its annual adopted changes and with the school’s charter agreement in determining student eligibility.”	
Clarify what is meant by “greatly expanding the capacity of the public school system without incurring any extra cost to the taxpayers of the county.” (P. 16)	

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:

- An educational program design that:
 - Is clear and coherent;
 - Is based on effective, experience or research-based educational practices and 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
 - Is likely lead to improved student performance for the school’s target population.
- A proposed daily school schedule and annual calendar that complies with statutory requirements for annual number of instructional minutes/days and aligns with priorities and practices described in the educational program design.

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

Strengths (reference page numbers)
The application covers the literature on STEM and references the relevant body of research. (Pp. 28-32)
Standards will be referenced in teacher lesson plans and the school will use the core ELA program and supplement it with other texts. (Pp. 33, 35)
The application appropriately cites MTSS descriptions from the resource florida-rti.org and states that the school will follow the district’s protocol. (Pp. 36-37)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

There is no evidence provided that the school has existing partnerships with Mote Marine, Riverview High School and “First Green” Bobby Jones County Club to provide teachers and students with real-world application opportunities, which is a key component of the schools’ STEM and science focused program. (P. 26)

An extensive list of instructional strategies is listed on pages 25 and 26 (differentiated instruction, standards-based, interdisciplinary connections, project-based learning, cooperative learning, inquiry-based learning, scaffolding, etc.). The CRC questions the school’s ability to find and hire teachers with such extensive experience or, the school/AES’s ability to build teacher capacity in the first few years of operation. (Pp. 25-26)

Several progress monitoring assessment tools are dated or no longer in use. There is redundancy in the types of assessment used that will place additional burdens on the teachers and over-test the students. (P. 27)

The proposed instructional calendar is not clearly described. The school plans to follow the district’s school calendar, yet will offer an extended academic day with over 1,200 extra instructional hours throughout the year. However, it is not clear what curriculum will be covered. For example, it is uncertain if all students receive the additional instruction or if it will be provided to interested students only. (Attachment B, p. 147)

The proposed daily school schedule does not meet the information requirement in the application – the elementary schedule does not reflect 4 hours of reading instruction or include the technology and science block. The 6th grade schedule includes periods labeled “7th” and “8th.” (Attachment B, p. 149)

The schedule does not show the extended day program. (Attachment B, p. 147)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
What does the word “prescriptive” in regards to professional development regarding the curriculum mean? (P. 19, 20)	
Briefly explain how the core areas of study integrate into STEM, i.e. Language Arts? (P. 24)	

<p>The school plans to provide students with opportunities to work on service learning projects and real-life applications to learning. Reference is made to existing partnerships with Mote Marine Laboratory and the “First Green” partnership with Bobby Jones County Club. (P. 24) Please ask these agencies/business to provide, on their agency letterhead, a brief description of the student projects and also provide the applicant with statement of commitment. Please attach the documents to your responses to this report.</p>	
<p>What does the term “adaPTOblity” mean? It is repeated several times in the application. (P. 30)</p>	
<p>Who are the “expert vendors” who will come to the school to work with students to learn and practice in “the Arts?” (Attachment B, p. 147)</p>	
<p>What are the art and music fees to be paid by parents? What programs/classes do the fees cover? (Attachment G, p. 215)</p>	
<p>Please provide a sample schedule of the extended day for elementary and for middle school. (Attachment B)</p>	
<p>Please provide the course codes that correspond to the middle school daily schedule as shown in Attachment B along with a typical student day by period/time. (Attachment B, p. 149)</p>	
<p>Please provide a sample of an elementary and a middle school teacher’s daily schedule.</p>	

4. Curriculum Plan

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

Statutory Reference(s):

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

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

- Provides a clear and coherent framework for teaching and learning;
- Is research-based;
- Is well-aligned with the school’s mission and educational philosophy;
- Provides an emphasis on reading;
- Will enable students to attain Florida standards and receive a year’s worth of learning for each year enrolled; and
- Will be appropriate for students below, at, and above grade level.

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

Strengths (reference page numbers)

Administrators will be in touch with classroom teaching, i.e. lesson plan feedback. (P. 39)

The school plans to use Sarasota’s Comprehensive K-12 Reading Plan. (P. 40)

Non-core curriculum includes the Legos Educational Program, Engineering is Elementary, and Project Lead the Way. (Pp. 47-48)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The application does not provide a clear description of the curriculum and educational programs. This is due, in part, to lack of essential information and misalignment between what the school plans and what is stated in the application. Insufficient detail is provided relative to STEM curriculum, the extended day curriculum.

The information in the application does not fully address how the curriculum will enable students to attain Florida standards and receive a year’s worth of learning for each year enrolled in the school.

It is not evident in the application that the proposed curriculum that it will be appropriate for students below, at, and above grade level. The middle school reading program description is vague and very weak. It does not show how Level 1 and Level 2 students will meet grade level reading standards. (P. 44) Courses are not detailed.

The school plans to follow the district’s instructional pacing guides, which do no align with the school’s K-6 STEM or STEAM curriculum (P. 39)

The budget for instructional materials will not be sufficient to support the extensive and costly list of instructional materials the school plans to use. (P. 40 and budget in Attachment X)

References are to STEM vs. STEAM appear throughout application.

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
How will the school fund the Scholastic Reading Inventory? (P. 40)	
The reading formula presented on page 42 is elementary-based. Briefly, please clarify how it will extend to the middle school grade levels.	

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:

- An understanding of academic accountability provisions and goals mandated by the state.
- An indication that the applicant will hold high expectations for student academic performance.
- Measurable goals for student academic growth and improvement.
- 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.
- A proposed assessment plan that is sufficient to determine whether students are making adequate progress.
- Evidence of a comprehensive and effective plan to use student achievement data to inform decisions about and adjustments to the educational program.
- Plans for sharing student performance information that will keep students and parents well informed of academic progress.
- Acknowledgement of and general plan to meet FERPA requirements.

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

Strengths (reference page numbers)

The school will have goals related to attendance, parent/employee satisfaction as well mission-specific goals related to STEM. (Pp. 52-53)

The school plans to follow the district’s Student Progression Plan. (P. 54)

Details on sharing student data are varied. (P. 59)

Applicant references appropriate FERPA laws. (P. 60)

Deficiencies/Concerns/Weaknesses: (reference page numbers)Student Performance/School Goals

Given the narrative on page 50, it is not evident that the applicant fully understands the definition of baseline data or baseline performance of incoming students who will enroll in year 1 of the charter. (P. 51)

The applicant states that the baseline for their students will mirror those of students expected to enroll but does not describe the expected incoming baseline performance (as required in the application). It goes on to say that their student demographics will mirror those of the district, which contradicts the next paragraph and contradicts what is stated in Section II (pp 13-14) of the application. The applicant acknowledges that they school will serve a higher percentage of minority and economically disadvantaged students than the district overall. The applicant claims to have a good understanding of the students to be served within the 5-mile radius. Therefore, the applicant should have described the expected incoming baseline of students who are expected to enroll in the school based on student achievement of the surrounding schools– not merely provided the school grades data for Sarasota. (Pp. 51-52)

Because the information presented lacks essential details, the committee is unable to determine if the applicant has a deep understanding of the state’s academic accountability requirements.

Given that measurable goals and performance outcomes are either not specified or are stated unclearly for each year of the charter, the committee cannot determine if the school will hold high expectations for student academic performance.

For example, in the application it states: “Math and Science scores will ultimately (in 5 years) grow 3% higher than the district average.” Does this mean a proficiency rate 3% age points higher by year 5 or a rate of growth that is 3% higher than the district’s? In another part it states that a minimum 2% increase in student proficiency is expected each subsequent year. Is the intent to be 8%age points higher in year 5 which is the same as 3% higher than the district? For the lowest quartile targets, it “growth of the lowest quartile will be 2% higher than the local schools and district average.” (P. 52) What year? Which local schools?

The STEM focus of marine science achievement is not mentioned in the mission-specific goals. The 5 bullets on page 54 are strategies, not measurable goals. (P. 52-54)

Placement & Student Progression

Based on the application, promotion standards do not provide clear criteria for promotion from one level to the next. (P. 54)

The applicant plans to follow the district’s Student Progression Plan, however, the school’s proposed program of studies and course offerings do not align.

Assessment & Evaluation

The information presented in the application does not fully address the reasons for selecting the proposed assessments, nor does it provide a solid explanation of how the numerous assessments align with the school’s curriculum, performance goals, and state standards.

The SRI and DRA were mentioned as assessments throughout the application (p. 40), but is not reflected in the Interim Assessments. (P. 56)
 Many different assessments are referenced in Section 3, Section 4, Section 5 (pp. 27, 40, 56) but not always the same tests. Which students will take which tests is not clear. The purpose of giving the assessments is not fully explained and/or the assessments are not reflected in the proposed assessment calendar. (Attachment F)

The applicant submitted the test coordinator’s “to-do” list as an example testing calendar, e.g. ordering materials, loading pre-ID data files. (Attachment F)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
Why is the expectation that only 90% of students will re-enroll in the second year of school? (P. 53)	
Why is a staff attrition rate of 15% expected after year 1? (P. 53)	
How will the school quantify students “making increased gains” in engineering? (P. 53)	
Describe conditions when the principal would reassign students mid-year and its impact on the school environment. (P. 54)	
Please note that Focus Information System is not used in any K-12 school, so this will not be an option for the proposed school. (P. 56)	
Provide assurances from Mote Marine that they will provide intensive professional development to train the school’s teachers on how to analyze, interpret and use data. (P. 58)	
When and how will the PLTW coursework be taught to the middle school students?	

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:

- A clear description of the programs, strategies and supports the school will provide to students with disabilities that will ensure appropriate access for students with disabilities and that the school will not discriminate based on disability.
- A clear description of how the school will ensure students with disabilities will have an equal opportunity of being selected for enrollment.
- A comprehensive and compelling plan for appropriate identification of students with special needs to ensure they are served in the least restrictive environment possible, have appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities in the same manner as non-disabled students, receive required and appropriate support services as outlined in their Individual Education Plans and 504 plans, and participate in standardized testing.
- 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 through the IEP process.
- 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 projections.

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

Strengths (reference page numbers)

The application narrative reflects a strong understanding of the MTSS process. Application clearly states that they will serve ESE students who would attend their districted school. (P. 61) There is a thorough explanation of the lottery system that does not discriminate against ESE students (Pp.14, 60)

Applicant addresses related services for ESE students. Applicant has a comprehensive plan for how students with special needs will be served in the Least Restrictive Environment and allow students multiple opportunities to demonstrate mastery. (P.62)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

It appears that severe students will have an individual intervention plan while awaiting the outcome of the Child Study Team’s findings. It is not clear if this is intended to serve as the crisis plan. (P. 66)

The application addresses how the school will support ESE students in need of academic supports but does not address how ESE students in need of behavior support, and with social-emotional goals, will be supported.

Projections for ESE populations to be served are inconsistent. In section two of the application the school expects 11% ESE. (P. 14) In this section the applicant states that it expects the same percentage as for Sarasota districtwide, which is 15%. (P. 68) Given that the applicant purports to serve students “in the surrounding areas” and/or within a 5-mile radius, the expected ESE population should mirror the target population described in Section 2. For schools within the 5-mile radius it might be closer to 18 - 22% ESE.

Applicant does not state need how they will access psychological or social history assessments for students. (P. 60)

The applicant incorrectly assumed that Section 6. H - Monitoring Progress, in the application was not applicable. Therefore, the application does not address how the school will monitor and evaluate the progress and success of students with disabilities to ensure the attainment of each student’s goals as set forth in the IEP or 504 plan. (P. 68)

Based on the information submitted, one cannot determine if the staffing plan will align with the ESE enrollment projection. It is a requirement to provide the number and qualifications of staff based on the ESE population – this has not been done. The applicant states that the school will have “enough Staff to accommodate” the needs of ESE students. There is one ESE Specialist in the budget; the narrative lists 2 to 3 positions. (P. 68) There is no mention of a Psychologist.

The applicant states, “All students required to take FSA”, which is inaccurate. Students with access points are not required to take the FSA. (P. 69)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
What are Focus Portals? (P. 63)	
Describe how applicant will work closely with Sarasota County regarding appropriate placement of each student with disabilities. (P. 63, before break)	
What is meant by severe students will have an individual intervention plan while awaiting CST? (P. 66, top)	

<p>Application states the monitoring of student progress will be based on “in house diagnostics” up to 3 time per year. Please provide further explanation, and how often will individual student progress be monitored per IEP cycle? (P. 69)</p>	
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7. English Language Learners

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

Statutory Reference(s):

s. 1002.33(10)(f)

Evaluation Criteria:

A response that meets the standard will present:

- Demonstrated understanding of legal obligations regarding the education of English Language Learners.
- A comprehensive and compelling plan 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.
- A clear plan for monitoring and evaluating the progress of ELL students, including exiting students from ELL services.
- Demonstrated capacity to meet the school’s obligations under state and federal law regarding the education of English Language Learners.
- A realistic enrollment projection (ELL) and a staffing plan that aligns with the projections.

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

Strengths (reference page numbers)

Demonstrates basic understanding of ESOL program requirements to appropriately serve ELLs. (Pp. 73-74)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The applicant states that the school will follow the district’s ELL plan. However, the information provided in the application does not fully align with the district’s plan or procedures. Misalignments occur in several procedural areas, including identification procedures and assessment. (P. 74)

The functions and roles of positions/committees is unclear because terms and labels are interchangeably used throughout, e.g. ELL Committee, ESOL facilitator, ESOL Coordinators, and Assessors. (P. 73, 77)

Applicant states that the school will be using WIDA and following the district’s ELL plan. However, Sarasota doesn’t use WIDA for ESOL placement.

The information presented does not indicate that the applicant has a clear understanding of the ESOL exit criteria. (P. 76)

Information presented regarding the monitoring and evaluation of ELL student progress is broad and lacks essential details. (P. 76)

The ELL enrollment projection will most likely be higher than what the applicant anticipates. It may be as high as 14% rather than 7%.

The review committee is unable to evaluate the staffing plan because the application does not provide the number of and proposed qualifications of staff (as is required in the application). The application states that the ELL population to be served will determine the staffing plan, which is not an acceptable plan. (P. 77)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant's Response
Please clarify the “facilitator” functions and roles vs. those of the ELL committee. (P. 73)	
How will the school use Voyager Passport for ELL? Will it be supplemental or in lieu of the core curriculum? (P. 75)	

8. School Culture 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.

Evaluation Criteria:

A response that meets the standard will present:

- A planned school culture that is consistent with the school’s mission and congruent with the student discipline policy.
- An approach to classroom management and student discipline that is consistent with the overall school culture and philosophy.
- Recognition of legal obligations and children’s rights related to enforcing student discipline, suspension, and recommended expulsion, including the school’s code of conduct, if available.
- Consideration of how the code of conduct will apply to students with special needs.
- Appropriate and clear roles of school administrators, teachers, staff, and the governing board regarding discipline policy implementation.

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

Strengths (reference page numbers)

The applicant seeks to establish a school-wide thoughtful climate and culture through the implementation of Stephen Covey’s 7 Habits of Highly Effective Students through the Leader In Me Program. (P. 78)

The applicant will follow the matrix of consequences for infractions outlined in the district’s Code of Student Conduct. (P. 78)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The applicant is instructed to state whether or not the school will use the district’s code of conduct. If the school plans to develop/implement their own, the application requires that they describe in detail the school’s approach to student discipline and conduct and attach the code of conduct as part of the application. It is somewhat confusing because the applicant does both – they state that they plan to use Sarasota’s, but they also provided their own. (P. 79, Attachment G)

The applicant’s Sarasota STEM Academy K-8 Parent/Student Handbook informs parents/students that they are bound to a district (Broward County Public Schools) other than the prospective sponsor’s Code of Conduct. (Attachment G, p. 207)

The school proposes to follow the district’s student code of conduct, however, some of the procedures described do not align to those of the district. The applicant should verify alignment of information published in the school handbook with district School Board policy and consequences as it applies to hazing, bullying, harassment, etc. if the school will be using district procedures. (Attachment G, pp. 210- 213)

Dismissal procedures are not addressed. The application does not provide guidelines and procedures that will be followed when a student is dismissed from Sarasota STEM Academy.

The applicant does not provide details regarding the appeal process that will be used if a parent/guardian seeks to challenge his or her student’s dismissal from Sarasota STEM Academy.

The applicant states that it will use the “matrix of consequences for infractions” that are outlined in the district’s Code of Student Conduct, but did not provide information that aligns the infractions with the consequences.

The bullying policy is not in alignment with Florida State Statute. (Attachment G, p. 212)

Grammatical/mechanical errors impeded this evaluator’s ability to clearly understand the student handbook. This evaluator recommends that the applicant review and correct grammatical/mechanical errors before distributing to the proposed school community.

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
Clarify the minimum number of minutes that grades 6-8 students must be in attendance to be considered present for any given school day? (P. 208)	
What grade levels are included in the description of “grade school” under the moving up exercises? (P. 208)	
Provide a copy of the Athletic Rules and Codes of Conduct referenced on pages 208 and 209.	
What is “SSAinst”? It is referenced throughout the handbook. (Attachment G)	
For your information, Sarasota County Schools partners with the local YMCA’s School House Link Program when identifying and serving families that are living in transitional or deemed homeless based on the McKinney-Vento Homeless Assistance Act.	

9. Supplemental Programming

The Supplemental Programming section should describe extra and co-curricular activities offered by the school. This section is optional.

Statutory Reference(s):

NA

Evaluation Criteria:

A response that meets the standard will present:

- A clear description of extra- and co-curricular activities that support, and do not detract from, the educational program.
- Evidence of an adequate funding source for extra- and co-curricular activities.
- Lack of supplemental programming may not be a basis for denial.

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

Strengths (reference page numbers)

After school activities and competitions are in alignment with the school’s STEM focused program. (Pp. 80-81)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The school’s extra- and co-curricular activities are referenced throughout the application as an essential piece of the educational design. (Pp. 7, 22, and 26) However, the applicant states that by year three of operation they hope to have partnerships to offer certain extra-curricular activities. In other parts of the application, partnerships are current and existing so teachers and students can benefit from the programs when school opens. (P. 80, 105)

Areas in Need of Additional Information and/or Clarification (reference page numbers)

Charter Applicant’s Response

Where is aftercare discussed?

Will fees be charged? If so, for which activities? If not, where is the funding in the budget to support the costs of the supplemental programs?

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.

10. Governance

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

- A governing board that is legally structured, or has a plan to organize in conformity with the laws of Florida.
- A clear description of the governing board’s roles, powers, and duties that are consistent with overseeing the academic, organizational, and financial success of the school.
- Appropriate delineation between governance and school management roles.
- At least the core of the Governing Board is identified that has a wide range of knowledge and skills needed to oversee a charter school.
- A board structure (e.g. bylaws and policies concerning member selection, committees, meeting frequency) that supports sustainable and effective school governance.
- Evidence that applicant understands and intends to implement open meeting and records laws.
- Clear policy and plan for dealing with conflicts of interest.
- Appropriate and clear role for any advisory bodies or councils if included.
- An outline of a grievance process (or policy) that will simultaneously address parent or student concerns and preserve appropriate governance and management roles.

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

Strengths (reference page numbers)

The narrative provided for the governance section meets all criteria. Understanding of the role of the board of directors is clear and appropriate – responsibilities are listed. Financial accountability standards and oversight are noted. Bylaws and conflict of interest policy are well-written. (Pp. 82-88)

The school’s governing board has a diverse range of experience in education, management and finances. (Pp 84-15) The school’s governing board will have Sarasota community member representation. (P. 85)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

This Governance Section of the application is well written, however, given the extent of ESP services and the structure of the ESP organization, the “arm’s length” relationship between the governing board, the school, and the ESP is questionable. (See reviewers comments for Addendum B – ESP)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
How will the monthly financials be reviewed and checked by the board of directors with quarterly meetings?	
The Board Member Information Sheet is incomplete for board member Rosemond. Please submit a complete, signed document.	
The resume for board member Galoppi is missing from the application. Please submit the missing resume.	
Will the Governing Board for the Sarasota school be the existing board in Manatee and/or in other Florida schools managed by Alliance Educational Services (AES)?	

11. Management and Staffing

The Management and Staffing 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:

- An organizational chart or charts that clearly and appropriately delineate lines of authority and reporting.
- A management structure that includes clear delineation of roles and responsibilities for administering the day-to-day activities of the school.
- Identification of a highly-qualified school leader or a sound plan for the recruitment and selection of the school leader.
- A viable and adequate staffing plan
- A sound plan for recruiting and retaining highly-qualified and appropriately-certified instructional staff.

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

Strengths (reference page numbers)

The proposed \$40K starting salary for teachers is competitive and realistic for the Sarasota area. (P. 112-113)

An organizational chart is presented and job responsibilities are delineated with job descriptions for key personnel. (Attachments M, P)

The criteria for the leadership of the school (Attachment O) states the process that will be taken to identify the principal with an emphasis on setting tone of the climate and culture. The best candidate will also poses knowledge of charter school operations and board responsibilities.

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The staffing plan lacks essential detail and does not include all essential personnel. The staffing chart on page 91 identifies 52 personnel needed to open the school which includes leadership and support staff, 45 are core or elective teachers. The 5 VPK teachers should not be included in the K-8 plan as Pre-K is not FTE funded. The applicant plans to hire ESE teachers based on enrollment, so in fact the staffing plan as presented does not address the staffing needs for all students. (P. 91-92)

Salaries are not provided for the principal, non-instructional positions or for administrative support positions. (P. 92)

One elective teacher per grade level may not be adequate. (P 92)

Recruitment efforts outlined in the application indicate actions such as placement on school website, and Teacher-Teachers, however no other recruitment efforts were reported. (P. 95)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant's Response
Please clarify: Will the VPK teachers be paid for by Early Childhood Coalition? How will their salaries be funded? (P. 91)	
Is the Psychologist a contracted position? (P. 91)	
Where in the budget is the cost for the position of Principal?	
Who are the "Non-Instructional Staff?" How many positions does this entail and what is the cost per position? (P. 92)	
What positions are included under "Administrative Support?" (P. 92)	
What is the proposed annual salary of the school principal?	

12. Human Resources and Employment

The Human Resources and 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 clear explanation of the relationship between employees and the school.
- Description of the school leader and teacher evaluation plans, or outline of such plans, which align with the Student Success Act as defined by state law.
- A compensation and benefits plan or outline of such a plan that is aligned with Florida’s Student Success Act, and will attract and retain quality staff.
- Procedures that are likely to result in the hiring of highly-effective personnel.
- Policies and procedures that hold staff to high professional standards or a plan to develop such policies and procedures.
- An effective plan to address any leadership or staff turnover.

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

Strengths (reference page numbers)

Policies and procedures outlined in the Beginning Teacher Support Program Plan and the Faculty/Staff Handbook seem thorough and all encompassing.

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The information in the application does not present a clear explanation of the relationship between employees and the school. It appears that the ESP is responsible for running the school’s operations, functions, programs, PD and the evaluation of the school administration.

The compensation and benefits plan lacks essential details. Therefore, the committee is unable to discern if it will be aligned with Florida’s Student Success Act.

Alliance Educational Services, Inc. (AES), the management company, will advertise, interview and vet the candidates for the principal position. The management company will evaluate the principal. (Pp. 94-95)

The cost for HR services are not outlined in the budget. The cost of benefits is not broken down - salaries and benefits are listed at \$3,179,800 so it is not possible to determine if the benefits plan aligns with Florida’s Student Success Act. (Attachment X)

Employee grievances must be appealed to the management company, AES, before going before the school’s board. (Attachment R – Employee Grievances)

For future reference, the author of the application should correct the document in Attachment R – remove references to “STEM STEM” “STEM STEM.”

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
The application states that “the Board has worked on an approved Salary Schedule in line with the District.” Please provide a copy of the referenced Salary Schedule. (P. 94)	
Who does the principal directly report to? Who will conduct the annual personnel evaluation for the principal?	
Who serves as the “AES Principal?” What role within the management company does the “AES Principal” play, and what is the relationship between the school principal and the AES Principal? (Attachment R, p. 317)	

13. Professional Development

The Professional Development section should clearly describe the proposed expectations and opportunities for administrators, teachers, and other relevant personnel.

Statutory Reference(s):

NA

Evaluation Criteria:

A response that meets the standard will present:

- Professional development activities for administrators and instructional staff that align with the educational program and support continual professional growth as well as growth in responsibilities related to specific job descriptions.

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

Strengths (reference page numbers)

Deficiencies/Concerns/Weaknesses: (reference page numbers)
The application states that several PD components will be supported by or provided by external organizations and partnerships for which no supporting documentation is available. (P.97)
Comment: The ESP, Alliance Educational Services, Inc., will establish and implement the majority of the professional development programs for teachers. (Pp. 96-97)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant's Response
Please submit a sample of a PD session for teachers from Mote Marine and Bobby Jones Country Club partners as described on page 97.	

14. 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.
- A plan and process that will likely result in the school meeting its enrollment projections.

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

Strengths (reference page numbers)

The enrollment time line and lottery process is appropriate and in compliance with statutory requirements. (P. 102)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The target population remains in question - The school intends to focus marketing on a 5-8 mile radius. Section 2 – Target Population and Student Body is both Sarasota and Manatee counties AND a 5-mile radius from the school. Which is it – all, 5-mile, 8-mile? (Section 2 and p. 100)

The applicant states that there are no other choice options for parents in the area, which is not an accurate statement.

The applicant is once again referencing partnerships with Mote Marine, Bobby Jones Country Club, and Riverview High School, for which there is no support submitted with this application.

It is not clear if the school will limit the enrollment process, as allowed by law, to certain student populations defined in section 1002.33(10)(e), F.S. The applicant states the school will be open to all eligible students in Sarasota and Manatee counties. The applicant also states it MAY limit the enrollment process to students who reside within a 5-mile radius of the school. (P. 101) The applicant must decide and declare if it will or will not limit the enrollment to target a specific population of students.

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant's Response
Please clarify enrollment periods for years two and subsequent years. The application states the open-enrollment period will be “at the end of the calendar year.” Would that be May-June of 2019 for the 2019-2020 school year? (P. 102)	
Please confirm if the school will or will not limit the enrollment process to target students as defined in section 1002.33(10)(e) F.S., specifically provision number 4.	

15. Parent and Community Involvement

The Parent and Community Involvement section should provide a broad overview of the school’s plans to encourage and support parental and community involvement.

Statutory Reference(s):

NA

Evaluation Criteria:

A response that meets the standard will present:

- A general conception of how parents will be involved with the school that aligns with the school’s mission and provisions of the educational program. A detailed plan may be developed following approval.

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

Strengths (reference page numbers)

The school plans to use varied and appropriate ways to keep parents informed. (P. 103)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

The applicant claims to have existing partnerships with Mote Marine lab, Riverview High School and a “First Green” partnership with Bobby Jones Country Club, yet no evidence is provided to support these statements. Throughout the application references are made to current and established partnerships and commitments from the community that will be essential to implementing and enhancing important components of the school’s program, such as student extra-curricular activities, lessons, instructional support, teacher training. However, the applicant provides no evidence that these resources have been committed by these organizations or businesses. (Pp. 104-105)

In earlier parts of the application it repeatedly states that the proposed school has current and existing partnerships to provide students and teachers with STEM-related projects, tools, activities. Yet on page 105 the plan is to have these collaborative partnerships in place by year 3 of the school opening. (P. 105)

The only document is a letter of commitment from Riverview High School submitted by a former RHS administrator who did not have the authority to commit the school’s resources. (Appendix T)

Areas in Need of Additional Information and/or Clarification <i>(reference page numbers)</i>	Charter Applicant's Response
Please provide letters of support and commitment from Mote Marine and Bobby Jones Country Club.	

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.

16. 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:

If a facility is acquired, reviewers will look for:

- Evidence that the proposed facility complies with all applicable laws, regulations, and policies and can be ready for the school’s opening OR a timeline to ensure the facility will be in compliance and ready by school’s opening.
- A facility that is appropriate and adequate for the school’s program and targeted population.
- Evidence that the school has the necessary resources to fund the facilities plan.
- A reasonable back-up plan should the proposed facility plan fall through.

If a facility is not yet acquired, reviewers will look for: N/A

- A realistic sense of facility needs.
- A plan and timeline for securing a facility that is appropriate and adequate for the school’s program and targeted population.
- Reasonable projections of facility requirements.
- Evidence that the school has the necessary resources to fund the facilities plan.
- Adequate facilities budget based on demonstrated understanding of fair market costs.

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

Strengths (reference page numbers)

The management company, Alliance Educational Services, Inc., negotiated a purchase/sale agreement with Charter School Beneva, LLC, the property owner. The 7.52 +/- acre site is located at 930 N. Beneva Road, Sarasota, Florida (currently known as the “circus city trailer park”).

The facilities plan is well done. The proposed building will accommodate 1,400 students plus 100 in day care.

<p>Deficiencies/Concerns/Weaknesses: (reference page numbers)</p> <p>There is insufficient evidence that the school has the necessary resources to fund the facilities plan (or pay lease costs). The Fund Balance is incorrect. (Attach Y)</p> <p>No fencing around the retention pond, exterior stairs with no protection from rain, unisex restrooms.</p> <p>The timeline for the construction and completion of the school in time to open in August of 2018 is unrealistic. It is of great concern given the delays and issues encountered with the new Avant Garde Academy Westchase school in Hillsborough County, which was not ready at the start of school in August 2017.</p>

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant's Response
<p>The plan calls for 50 classrooms to accommodate 1,400 students. That is 28 students per classroom. Please clarify.</p>	
<p>81,440 square feet for \$12,000,000 is \$147 per square feet, and \$12,000,000 includes the site work. The district would not be able to build to this standard. What is the estimated TOTAL project cost (acquisition plus construction)?</p>	
<p>Building Hope's letter says it will work with Sarasota STEM Academy, not AES or Charter School Beneva, LLC. Who will receive the loan from Building Hope? Please clarify. (P. 106)</p>	
<p>What local churches and "other similar organizations" have been contacted to discuss a second contingency location? (P. 107)</p>	
<p>The application states that "the school has a back- up contract for an additional space in the event that the primary site is deemed unsuitable during the due diligence period prior to closing." Where is the additional space and with whom is the contract? (P. 107)</p>	

17. Transportation

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

Statutory Reference(s):

s. 1002.33(20)

Evaluation Criteria:

A response that meets the standard will present:

- An outline of a reasonable transportation plan that serves all eligible students and will not be a barrier to access for students residing within a reasonable distance of the school.

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

Strengths (reference page numbers)

Deficiencies/Concerns/Weaknesses: (reference page numbers)
The application listed various transportation options, not an outline of a reasonable transportation plan. (P. 108)
The school plans to offer transportation to students who live between 2-4 miles of the school, yet the school plans to limit the enrollment process to target students who live within a 5-mile radius of the school.

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
Please be advised that charter schools must report bus drivers’ clearance, permits and bus inspections, etc. to Sarasota County School Board.	
What is the rationale for not offering transportation for students who live within the 5-mile radius (the target student group) because they live between 4 and 5 miles of the school? (P. 108)	
On what basis is the applicant estimating that only 25% - 40% of the students will need bus transportation?	

18. 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 and makes particular provisions for those students who may qualify for free or reduced price lunch.
- A food service plan that places an emphasis on quality, healthy foods.

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

Strengths (reference page numbers)
Sarasota STEM provides details that indicate an understanding of the requirements to serve all children, under National School Lunch Program guidelines. (Pp. 109-110)

Deficiencies/Concerns/Weaknesses: (reference page numbers)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant's Response
Please indicate where in the budget are expenses for food service equipment. AED for costs?	

19. School Safety and Security

The School Safety and Security section should provide a description of the school’s plan to ensure the safety and security of its students and faculty.

Statutory Reference(s):

s. 1002.33(7)(a)11.

Evaluation Criteria:

A response that meets the standard will present:

- A plan that will reasonably ensure the safety of students and staff and the protection of the school facility and property. Note that a fully-developed plan will be completed upon approval of the application.

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

Strengths <i>(reference page numbers)</i>

Deficiencies/Concerns/Weaknesses: <i>(reference page numbers)</i>
The school plans to follow the district’s Code of Conduct, but the proposed plan provides minimal emphasis on security personnel. (P. 110)
Comment: The one-page outline of the plan presented provides sketchy information about the school’s plan for safety and security. However, if approved, the applicant will be required to submit a fully-developed comprehensive plan.

Areas in Need of Additional Information and/or Clarification <i>(reference page numbers)</i>	Charter Applicant’s Response
How much has the school budgeted for expenses related to Safety and Security? (Page 110)	

20. 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 that are consistent with and support all key aspects of the application, including the school’s mission, educational program, staffing plan, and facility.
- A realistic assessment of projected sources of revenue and expenses that ensure the financial viability of the school.
- A sound plan to adjust the budget should revenues not materialize as planned.

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

Strengths <i>(reference page numbers)</i>

Deficiencies/Concerns/Weaknesses: <i>(reference page numbers)</i>
<p>Budgetary projections provided in the application are not consistent with and do not support the school’s proposed educational program, instructional materials, staffing plan, and facility.</p> <p>The applicant has not submitted a realistic assessment of projected sources of revenue and expenses. Therefore, the financial viability of the school is questionable.</p> <p>The applicant is balancing the budget on the assumption that local Referendum funds will be available as a source of revenue. The Referendum is up for vote in 2018 for 2018-19 school year, therefore it cannot be considered as a revenue source. (Attachment X)</p> <p>The ending monthly balance should be equal to the next month’s starting balance. (Attachment Y, p. 405)</p> <p>The debt service repayment is not clearly identified in the budget. (Attach Z)</p>

The applicant included FTE from all 90 VPK students in the Revenue Estimate Worksheet. The charter will only receive FTE for VPK students who are ESE.

The plan to adjust the budget should revenues not materialize as planned is vague and lacks sufficient details.

The name of one of Imagine Schools’ officers appears on the footer of the budget worksheet document. (Attachment X)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
How many ESE children are expected to be served in the VPK program (out of the 90 projected enrollment)?	
Who owns the land after 5 years if purchased? AES or the school? If purchased in 5 to 10 years, where is the debt coming from?	
Regarding the \$2000 per student for FFET and instructional materials - does this include furniture, equipment, textbooks and curriculum and is that over 5 years? To whom is the annualized lease payment made? (P. 113)	
Please provide more detail on the Supplemental Fee/VPK Revenue. (Attachment X)	
The 2% contingency of \$250,000 is coming from what source?	
What percentage of the \$250,000 contingency goes towards salaries and how much towards repayment of the start-up debt?	
Please indicate where in the budget the costs for Safety & Security are included.	
Who issued the Series A and B bonds? Whose debt is it? (Attachment Z)	

21. 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, including who (or what contracted entity) will manage the finances. Such plan should contain strong internal controls to ensure appropriate fiscal management and ability to comply with all financial reporting requirements.
- A plan for the governing board to regularly exercise oversight over and take accountability for all financial operations of the school.
- Provisions for an annual financial audit.
- Appropriate public transparency of school financial health.
- Appropriate plan to securely store financial records.
- A plan to obtain appropriate and reasonable insurance coverage.

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

Strengths (reference page numbers)

The financial oversight systems described in the application are appropriate. Provisions for the annual financial audits are addressed.

Deficiencies/Concerns/Weaknesses: (reference page numbers)

Areas in Need of Additional Information and/or Clarification <i>(reference page numbers)</i>	Charter Applicant's Response
<p>All insurance outlined in the application is compliant with Sarasota County School's insurance requirements, with the exception that Sarasota County Schools should be named as an additional insured on all liability and property policies except Workers' Compensation. (Pp. 123-124)</p>	

22. Start-Up Plan

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

Statutory Reference(s):

s. 1002.33(7)(a)16.

Evaluation Criteria:

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

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

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

Strengths (reference page numbers)

Deficiencies/Concerns/Weaknesses: (reference page numbers)
Start-up activities do not align with start-up budget. (P. 125)
The timeline for completion of construction and the date for Certificate of Occupancy is unrealistic.

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
Please clarify the discrepancy in the enrollment and lottery dates provided in the start-up action plan as compared to the timeline on page 102.	

Addendum

Addendum A: Replications

The Replications section should identify the school to be replicated and provide evidence that the model has been successful in raising student achievement, while also describing the capacity of the organization to operate an additional school.

This section is not applicable to the application and has been removed to reduce the size of this report.

Addendum A1: High-Performing Replications

The High-Performing Replications section should identify the school to be replicated and provide evidence that the proposed school meets the statutory requirements of being a substantially similar model of a school that has been designated as a High-Performing Charter School and is being established and operated by an organization or individuals that were significantly involved in the operation of the school being replicated.

This section is not applicable to the application and has been removed to reduce the size of this report.

Addendum B: Education Service Providers

The ESP section should provide a rationale for contracting with the ESP, evidence of ESP success in operating high-quality charter schools, the capacity of the ESP to successfully operate this school, and evidence that the governing board and ESP are able to operate free from conflicts of interest.

Statutory Reference(s):

s. 1002.33(6)(a)

Evaluation Criteria:

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

- A clear explanation of the reasons for contracting with an education service provider and how and why the ESP was selected and a description of the due diligence employed to assess the capacity of the ESP.
- Sufficient evidence of the ESP’s previous academic, organizational, and financial success and capacity for future success that make it more likely than not that it will be successful with the proposed school.
- Evidence of the ESP’s organizational capacity to manage an additional school or schools as determined by its growth plan.
- A comprehensive list (Form IEPC-MIA) of all schools affiliated with the ESP and ensuing performance data used to support the selection of the ESP (past and current).
- Evidence of success working with similar populations to the target population. If there are deficiencies or lack of experience working with the target populations, then reviewers will look for a sufficient explanation of programmatic adjustments that will be made to ensure success with any new school(s).
- A clear delineation of the roles and responsibilities and decision-making authority of the school’s governing board and the ESP, structured to ensure a clearly defined arm’s-length, performance-based relationship that is free from conflicts of interest. This includes evidence that the school’s governing board has a clear plan for holding the ESP accountable for negotiated performance.
- A clear delineation of the term of the management agreement, the conditions, grounds and procedures by which the agreement may be renewed and terminated, and a plan for continued operation of the school in the event of termination.
- A draft of the proposed contract with all key terms included.

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

Strengths (reference page numbers)
The individual members of the AES leadership team have years of experience in public school education. (P. 129)

Deficiencies/Concerns/Weaknesses: (reference page numbers)ESP Selection

Support for why the school's board decided to use an ESP and a description of the due diligence employed to assess the capacity of AES lacks essential details. There is no indication that other ESP companies were considered prior to contracting with AES. Part of the rationale for selecting AES is attributed to the AES founding members' experiences when they worked as independent consultants, which is relevant, but not sufficient. The committee would prefer to see more evidence of the board's due diligence efforts and review of AES' track record and growth plans. (P. 127)

The Board assessed AES' capabilities via references, but other than the "glowing recommendations" from the individuals listed as references, the applicant did not provide a summary of the information gathered from the reference checks, as required in the application. The Board assessed capacity from "an extensive interview process" not fully described in the application. Again, no indication that other ESPs or management companies were evaluated for consideration. (P. 128)

ESP Track Record

Given that other Avant Garde Academy charter schools have been rated F or D, it calls into question AES' capacity to be successful with the proposed school in Sarasota County.

There is no narrative in the application that explains the ESP's success in serving student populations similar to the target population of the school here in Sarasota. (P. 130, section B only refers to the Excel worksheet)

Legal Relationships/Organizational Structure

The way the school's board and ESP are structured, the arm's-length, performance-based relationship is questionable. The ESP and Board "share" many roles, some directly related to financial management, placing, supervising, and evaluating the principal. AES appear to have the same (or more) power in most roles. The performance-based contractual relationship is not evident, nor is it likely given AES's authority to run all operations, functions, programs and administration of the school. (P. 131-134)

Management Contract (Attachment EE)

The draft of the proposed contract between the school and AES does not include all key terms. Paragraph 1 of the contract says the manager will be responsible for the "administration, operation and performance" of the school. No further delineation of responsibilities is really made. Activities such as recruiting/training staff, marketing, etc. are broadly stated.

There is no provision in the contract that would allow the governing board to hold the ESP accountable for negotiated performance due in part because there are no performance criteria listed and because nothing in the contract gives the governing board the right to hold the manager accountable (including terminating the contract) in the event any established performance criteria are not met.

The clear delineation of responsibilities discussed above is essential for a number of reasons including (a) without it, how can the performance of the manager be adequately evaluated, and (b) paragraph 3 of the contract states that "additional work not expressly included in this agreement and related to ISE Charter Operation will be considered outside of the scope of the agreement" and further compensation may be

negotiated. Without knowing exactly what is “expressly included,” neither the School Board nor the parties to the contract can know what is “outside the scope of the agreement” and thus eligible for additional compensation.

With further regard to payment, paragraph 5(a) says the manager is to receive “an amount not to exceed \$300,000” for services in the planning year. In addition to the issue that it is not entirely clear what the manager is supposed to do during that year, there is no provision for how it will be paid for its services other than the amount will not exceed \$300,000. Additionally, the contract says the manager will be reimbursed for the procurement of third party services but the contract is silent as to any parameters of cost for these services nor does it state what those services might be.

Similar issues to those mentioned above exist for the five years of school – the contract states the manager will be paid 8% of total revenues but it does not state the services for which it will be paid. The contract also provides that the planning year expenses (not to exceed \$300,000 plus reimbursement for third party services) will be billed after the fact (by 7/31/18) and become a note which the school must repay. Several issues: (a) if the school doesn’t get the bill until after the planning year is complete, how can it control costs along the way, and (b) the contract also provides that interest will start on 7/1/18 even before the bill is received.

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant’s Response
How many employees are currently employed by AES?	
What other ESPs or management companies did the board consider and interview?	
What document in which Appendix provides the set of policies regarding financial controls referenced on page 131 of the application?	
Please provide a copy of AES’ current structure and organization for the management of the Avant Garde Academy that opened this year in Hillsborough County.	

Applicant History Worksheets (Form IEPC-M1A)

The Applicant History Worksheets should provide information regarding the track record of the applicant, the applicant’s governing board, and if applicable, the applicant’s ESP with regard to the operation of other charter schools. The sponsor should review the entire portfolio of charter schools of the foregoing entities when evaluating performance. The academic and financial performance of the portfolio should be considered in the decision to approve or deny the application.

Statutory Reference(s):

s. 1002.33(6)(a)

Evaluation Criteria:

A sponsor should review the portfolio of schools operated by the applicant group, governing board, or ESP to determine if the academic and financial performance demonstrates the capacity to operate a high-quality charter school.

Strengths (reference page numbers)

Deficiencies/Concerns/Weaknesses: (reference page numbers)
<p>The applicant completed Worksheet A – “For Schools Currently or Previously Operated by Applicant”. Given that the School will contract with AES, the ESP, we believe that Worksheet C – “Schools Currently or Previously Operated by Management Company” was the appropriate form to complete.</p> <p>There is insufficient evidence that AES will have the capacity to expand their operations and services to operate a high-quality charter school in Sarasota County. In fact, AES struggled to open its newest managed school in Hillsborough County.</p> <p>The Avant Garde Academy school in Osceola (MSID 0155) is a D-rated school. The relationship between AES team and the Osceola schools is unclear. Mr. Bolanos’ role in the Avant Garde Academy Foundation, Inc., the existing Osceola Avant Garde schools (now managed by iSchools, LLC) and the AES need clarification.</p> <p>The information submitted in the worksheet is incomplete.</p> <ul style="list-style-type: none"> - Information and school grades data is not shown for Avant Garde Academy (MSID 0155) in Osceola County. - Justin Matthews is not listed - however, he is referenced in the application as the Chief Operating Officer for AES and he appears on the AES organization chart. (Attachment BB – ESP Org Chart)

Areas in Need of Additional Information and/or Clarification (reference page numbers)	Charter Applicant's Response
What is the relationship between Mr. Bolanos and the Avant Garde Academy on Orange Blossom Trail in Osceola (MSID 0155)? On the worksheet Mr. Bolanos is listed as the “manger” for the Avant Garde Academy K-8 on Pleasant Hill Rd (MSID 0161), which now is managed by iSchools, but not on the other Osceola school.	
Has AES ever served as the management company or ESP for either of the Avant Garde Academies in Osceola County?	