Horizons Unlimited Creative Learning Academy Charter Application

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, 2014. The CRC feedback is divided into three categories: 1) Strengths, 2) 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 "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 Thursday, September 18, 2014. 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)(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	☐	☒	☐
Final	☐	☐	☐

Strengths

Curricular resources have been carefully selected and are aligned to those approved by the state. Progress Monitoring tools and Reading Intervention materials are researched based. (Pages 6-7)

HUCLA's after-school programs will support learning. (Page 7)

Concerns/Weaknesses:

"Parental Involvement" seems to be the cornerstone of HUCLA's educational program. If a comprehensive level of parental involvement cannot be achieved and maintained throughout all grade levels the proposed educational program would then be unrealistic and unworkable. (Page 2)

The technological tools referenced in the application for high levels of achievement, remediation, and enrichment are not fully described. (Page 7)

Learning outcomes and measures focus on individual student progress monitoring and outcomes. Information about other learning outcomes is general. It appears that school level outcomes for students in Kindergarten – 2 are not addressed. (Page 7)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Parental involvement is an integral component of your program. How will you hold parents to the requirements stated in the parental contract? (Attachment 13.E)	
Earobics is a targeted reading intervention for grades K-3. What will you use for below level readers in grades 4-5? (Page 6)	

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	☐	☒	☐
Final	☐	☐	☐

Strengths
HUCLA plans to be a small K-5 community school. The plan is to primarily target students who live within a 2.5 mile radius of the school. The students to be served align with the school's mission. (Page 9)

Concerns/Weaknesses:
The applicant does not provide sufficient evidence that the projected student enrollment can be achieved. (Page 9) Reference is made to the Farmer's Market demographic data for Sarasota County as a whole, yet the school proposes to primarily serve students within a 2.5 mile radius of the school. The demographic composition of the school is not clear. (Page 12) It is not clear how the projected enrollment numbers were determined. (Page 13)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
On page 12 of the application it states that an assessment survey was conducted. What did the data reveal that supports the student	

projections? And what are the estimated numbers of incoming students from community preschool programs that support the projected enrollment for HUCLA? (Page 12)	
On what basis did the applicant determine that 120 students in grades K-3 live within 2.5 miles of the school? (Page 13) Please clarify.	

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	☐	☒	☐
Final	☐	☐	☐

Strengths

Curricular resources have been carefully selected and are aligned to those approved by the state. Progress monitoring tools and Reading Intervention materials are researched based. (Page 14)

The extended school day will provide more instructional time and will benefit all students. (Page 14)

Parents as partners in learning to enhance technology skills are commendable. (Page 15)

Short individual or group research projects will bring students to extend their thinking. (Page 16)

Concerns/Weaknesses :

In the application Earobics is shown as a K-5 intervention program, however, the program is only for grades K-3. The applicant may not fully understand the purpose and application of the program. (Page 14)

The plans for technical support appear weak in light of the emphasis on technology integration and may not be sufficient to implement all the technology-based programs and testing. (Page 15)

The Professional Development (PD) plan for training teachers in all areas described at the "beginning of school" lacks specificity. (Page 15) References to PD plans in subsequent sections of the application are also vague.

The application does not fully address how the services the school will provide will help students attain the Florida standards, as required by F.S. 1002.33. (E. Page 17)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
While it is commendable to have an extended instructional day, 7:30-4:15, how will the daily schedule accommodate the shorter attention span of very young children especially K-1? (Page 14)	
Student Daily Schedule – Clarify what course codes will be used for each block of learning (ie. remediation, enrichment, computer, etc.). (Page 14)	
Is there a plan for a library management system including collection development, inventory, and distribution of materials? Staffing? (Page 16)	
Comment: Given that the district does not use all of the instructional materials proposed by the school (page 14), the district will be unable to provide support related to the use of these materials for instruction. Therefore the applicant is advised to plan and allocate resources and be prepared to provide most of their own professional development. (Page 14)	

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

Statutory Reference(s):
s. 1002.33(6)(a)(2); s. 1002.33(6)(a)(4); s. 1002.33(7)(a)(2); s.1002.33(7)(a)(4)

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

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

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

Strengths
Curricular resources have been carefully selected and are aligned to those approved by the state. Progress Monitoring tools and Reading Intervention materials are researched based. (Pages 18-21)   The integrated instructional approach to encourage transportable learning is to be commended.   The recognition program will be developed to reinforce parent participation. (Page 32)

Concerns/Weaknesses:
While the application specifies curriculum programs to be used and their components, a reading plan does not exist. There is not a description of <u>how</u> the programs will be implemented to support instruction and student progress.   The application does not address how students will benefit from the school's curriculum. There is no mention of differentiation for struggling students, nor students reading above grade level. (Pages 37-38)

The application mentions a target of 50% of students achieving a level 4 on the writing assessment, however, there is no evidence of a plan to achieve that high level. (Page 42) In addition, this performance goal is not addressed in Section 5.

The application does not address the state's ACCEL requirement be met.

The Professional Development plan lacks specificity. (Page 32)

The application does not describe or explain the "who, what, and when" of the process followed to determine that a student needs to receive Tier III intervention. It does not provide information about the intervals at which progress monitoring takes place. The same concerns apply for the information in the application related to the Tier II process/determination. (Pages 30-31)

The RtI/MTSS description is missing several key components and important processes.

With the emphasis that is placed on the integration of technology into the curriculum and instruction, the budget for both computer hardware and software appears insufficient to support that emphasis.

The description of how the effectiveness of the curriculum will be evaluated is vague and does not fully address the question. (Page 42)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Clarify understanding of National Standards vs. Florida's standards for science courses K-5. (Page 24)	
How are you determining your projections of student achievement year one and the growth expected each year thereafter? (F. Evaluation of Curriculum, Pages 42-43)	
Will technology be available within the classroom or only in a computer lab? How will this meet your goal for integrating technology as part of the learning process? (Page 41)	

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	☐	☒	☐
Final	☐	☐	☐

Strengths

The personalized learning plan, the RMS, should be a great tool for monitoring student progress and a good strategy for engaging the student and parent in the learning process. (Pages 48-49)

The assessment tools identified for progress monitoring, FAIR and easyCBM, are appropriate.

Concerns/Weaknesses:
The information in the application does not fully address the school's goals and objectives and how much students are expected to show each year. The goals are broadly stated without specification as to the amount or level of increase in achievement; no specifics are given by grade level, not all content areas are addressed. (Page 44)

The information presented for promotion and retention lacks detail or is a verbatim statement of state statute. The application does not provide "clear criteria for promotion from one level to the next." Therefore, it is not evident that the applicant has a clear understanding of state retention and promotion requirements. (Page 45)

The description for how student assessment data will be used to evaluate and inform instruction lacks detail which makes it difficult to determine if the instruction and instructional strategies will be modified or adjusted based on data analysis. (Page 49)

The described plan for how the school will share student performance information with students and parents is vague and limited to progress monitoring assessments. When parents are to receive test results does not match the number and administration periods for that particular test. For example, the FAIR is administered three times in a school year however the plan is to send reports to parents every two months. (Page 49)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
It is not clear if the applicant plans to follow the district's Student Progression Plan or implement their own SPP. (Page 45) Please clarify.	
The FAIR is administered three times in a school year, so how will the school send reports every two months to parents? (Page 49)	
How and when will parents receive information about summative assessments? (Page 49)	

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	☐	☒	☐
Final	☐	☐	☐

Strengths
HUCLA will serve students with disabilities (SWD) whose needs can be met in a regular classroom environment. (Page 50)

Strong commitment to inclusionary practices, with some direct instruction for students. Each student will have an individual plan based on academic data/profile. (Page 51)

Concerns/Weaknesses:
The application lacks sufficient detail to determine the extent to which SWD who are below grade level will access and benefit from the curriculum. (Page 54)

The enrollment projection for SWD is not realistic. The staffing plan does not appear to align with student projections. With the

projections of between approximately 18-24 ESE students year one, in grades K-3, how will you provide services for the Speech and/or Language students who make up a significant portion of the ESE students at the proposed level of service? (Page 54)

There is a lack of alignment with the services to be provided and the staffing plan. The projection for one teacher and one ESE liaison who also serves as a guidance counselor will not be sufficient to support the instructional needs of the students. (Page 55) There is no mention of S/L staff. A psychologist is referenced in staffing but is not listed in application's budget.

The proposal to hire an ESE Liaison with the qualifications listed on the job description does not appear viable (Attachment 10.A). Speech–Language evaluation and services must be provided by a licensed or certified SLP. There is not a job description for ESE Teacher.

The application notes that one person will be in the position as the ESE Liaison and Counselor. Certification tied in to one position is a concern. (Page 55)

The narrative provided that describes how the school will serve gifted students is text from the district's ESE plan. The applicant will need to demonstrate an understanding of how the procedures described will "look" when implemented and applied in a real setting. (Page 56)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
The application discusses enrollment procedures to determine if the school can meet the needs of the students. The question as to how the school will ensure that students with disabilities will have an equal opportunity of being selected is not fully addressed. (Page 50) Please reply.	
Collaboration between support staff including a psychologist is mentioned in section C, but it is unclear how applicant will access those services. (Page 51) Psychologist is not listed in applicant's budget.	
Note of clarification to the applicant: please be aware that the school is solely responsible for any assessments and reporting requirements. (2nd Paragraph, Page 51)	

7. English Language Learners

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

Statutory Reference(s):
s. 1002.33(10)

Evaluation Criteria:

A response that meets the standard will present:

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

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

Strengths

Concerns/Weaknesses:
The response lacks meaningful detail and raises substantial concerns about the applicant's understanding of state and federal requirements regarding the education of English language learner students (ELLs). In addition it raises concerns about the ability to meet the requirement in practice regarding the services for educating ELLs and to provide all students with a high quality education. (Pages 58-59) The application states that the school will use the same identification/placement tools that the district employs. However, the assessments listed are not used by the district. (Page 58) The belief that only one ESOL certified teacher will be sufficient is not realistic. (Page 59)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
In the application it states that the school will follow the district's ELL plan yet the placement assessments listed are not used in our district. (Page 58) Please clarify.	
How did you arrive at the 5% ELL population projection? (Page 59)	

8. School Climate and Discipline

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

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

Strengths

Parental involvement is a major component in supporting and promoting good conduct. (Page 60)

Implementing Positive Behavior Support (PBS) and planned celebrations is a sound approach. "Doing the right thing" recognition and lots of planned parent involvement, including parenting classes serves to promote and support a positive learning environment. (Pages 61-62)

Concerns/Weaknesses:

The applicant does not clearly identify or fully describe the research based strategies and systems for the future PBS Model that will be implemented to create effective school-wide and classroom management. (Pages 60-62)

The description of the process and implementation for PBS and Multi-tiered System of Support (MTSS) is vague and use of Functional Behavior Assessments (FBA) will require specific training. The applicant may not be familiar with the criteria and process to determine if a student needs a FBA. (Page 61)

The applicant may not fully understand the public school protocol for discipline, suspension, and dismissal. For example, contrary to what

is stated in the application, students cannot be expelled for poor attendance.

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
How would it be determined that a student requires a FBA? (Page 61)	
Does the school intend to follow the district's code of conduct or their own? Reference is made to both. (Page 62) Please clarify.	
The restriction of the use of electronic devises may limit student's advancement in the area of technology. (Page 64) Please address in brief.	
Since the district does not "dismiss" students from their attendance zoned schools, what procedures and guidelines will the applicant use to dismiss students from HUCLA?	

II. Organizational Plan

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

9. Governance

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

Statutory Reference(s):
s. 1002.33(7)(a)(15); s. 1002.33(9)

Evaluation Criteria:
A response that meets the standard will present:

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

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

Strengths

Concerns/Weaknesses:
It appears that the charter school board is being controlled by another entity, The Exodus Project CDC (TEPCDC). Exodus CDC will appoint the Board of the HUCLA charter school. It also states that "all profits from the operation of the school shall be reinvested either: (a) into the school mission; or (b) other Exodus Project CDC projects that serve the mission of HUCLA." It does not appear the HUCLA school board would be independent in the policy decision making of the charter school. All funds need to stay in the school account, not diverted to other Exodus projects. (Section 9. Governance, Page 68)

Compliance with FS 112.313 is uncertain based on the information provided in the application. It appears that the school's board of directors is selected by the parent corporation, TEPCDC. The Exodus Project board is listed in the hierarchy. In addition, any profits from the school must stay within the school; they cannot comingle with other corporation's funds. Otherwise it would be considered "doing business with one's self." (Pages 68 – 70, Attachment 9.D)

The charter's school board should not be the entity to resolve parent disputes. The board shall appoint a Parent Involvement Representative as outlined in FS1002.33. This individual would be one other option before the board takes action on disputes. (Page 71)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Have you verified with an attorney that the board appointments and relationship with the Exodus Project is in accordance with F.S. 112.313?	
On page 68 it states that TEPCDC is the parent organization but on the application cover page it states that Bethlehem Church is the parent organization. Please clarify this discrepancy.	

10. Management

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

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

Strengths
The criteria and process for selecting the school leader is clearly addressed. (Page 72)
HUCLA addressed retention plan outlined as cultural elements for qualified and capable staff.

Concerns/Weaknesses:
There is significant misalignment between the proposed organization and management structure of the school (Attachment 9.D), the staffing plan in Section 10.C. and the budget (Attachment 17.A).

Several concerns are identified related to the job descriptions(Attachment 10.A):
- Teacher job description does not include expected Knowledge, Skills and Abilities, or certification requirements. Physical requirements and terms of employment were also omitted. Does not indicate certification required.
- Clerical Registrar: Only one year of clerical or secretarial experience is required. This position must process payroll and other

financial services.

The proposed staff plan shows projected enrollment and staffing for 5 yrs. However, the staffing plan is not aligned with the budget.
- The Media Technician position is not included in budget. (Attachment 17.A)
- Aides are not identified as ESE, ESOL, Autistic or classroom aides. (Pages 73-74; Attachment 17.A)
- The annual increase in the number of aides is consistent with the proposed growth, however, it is not reflected in the budget.
- There is no job description for Treasurer and it is not listed as budgeted staff. (Attachment 17.A)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Please provide an organizational chart that aligns with the staffing plan and also aligns with the job descriptions.	

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

Statutory Reference(s):
s. 1002.33(7)(a)(9)

Evaluation Criteria:
A response that meets the standard will present:

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

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

Strengths

Concerns/Weaknesses:

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

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	☐	☒	☐
Final	☐	☐	☐

Strengths
HUCLA plans to follow district procedures for hiring and dismissal of employees. (Page79)

Concerns/Weaknesses:
The proposed compensation plan lacks sufficient detail. The application does not provide a salary schedule or starting pay scale. (Pages 79-80) The application states that "a thorough and comprehensive search will be conducted to provide the best coverage and benefits for HUCLA employees" but provides no details. Costs associated with benefits are not included in the budget. (Page 79)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Please provide a proposed salary schedule for teachers and a projected cost estimate for benefits.	
Please note that school personnel policies need to be in place prior to the start of school rather than presented to the HUCLA Board	

(not Sarasota Board) for adoption on September 1, 2015. (Page 80) Please confirm understanding.	

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	☐	☒	☐
Final	☐	☐	☐

Strengths

The school's marketing strategies are varied and sufficient. (Page 81)

The commitment parents will make to ensure their child's success is clearly stated in the student and parent compact. (Appendix 13.E)

Concerns/Weaknesses:

It appears that the service area described in Section 13.A does not align with the description of the target student population described in Section 2 of the application. (Pages 9 & 81)

The application states that "we believe our enrollment will be representative of the service area." However, the application also states that the goal is to "attain a student body closely mirroring the racial/ethnic population of Sarasota County." The student body for the district is not similar to the service area (2.5 mile radius) proposed for the school. (Page 81)

The lottery process as required by law is not fully addressed. (Page 82)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
What is the anticipated demographic composition of the 2.5 mile radius around the school and the surrounding community? Please provide data, such as percentages. (Page 81)	
Does the school plan to use students residence (e.g., within 2.5 miles of school) as an enrollment <u>preference</u> in addition to the population target? (Page 82)	
The lottery is indicated as an item on the time schedule. However, briefly describe how the lottery will be conducted, if necessary. (Page 82)	

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	☐	☒	☐
Final	☐	☐	☐

Strengths

HUCLA already has an acquired site, which is a 2-acre site north of Dr. Martin Luther King, Jr. Way on Lemon Avenue. (Page 84)

Concerns/Weaknesses:

Some adjustments might be required to the layout of the portables in regards to their spacing based on their construction Type VB.

Page 85 indicates a cost of $50,000 for site preparation costs which seems to be inadequate for the amount of work required.

The budget states $64,800 for the portable lease per year. It does not appear to address the portable delivery & setup costs of approximately $55, 290, nor the $50,000 required for the initial site work. (Appendix 14.B & 17.A)

The application does not fully address how the facility will meet the space needed for operating a school. There is no space identified for

offices, food service or an area for bus drives or parent pick up for the temporary site consisting of portables.

The founders are under the wrong assumption that the Sarasota County School Board has funds to support the startup costs for facilities. In the application it is stated "It is our understanding that the Sarasota County School Board has funds to support some of the startup costs for these facilities." (Page 85)

Section 14.E requires an alternate plan if the proposed facility is not ready for the opening of school. HUCLA has not prepared a back-up plan. (Page 85)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
On page 85 the site preparation costs are indicated to be about $50,000. However, on page 89 the application states $200,000 for site preparation. Please clarify. (Page 84 & 89)	
While the CRC appreciates that the founding board is confident that the school will be ready to open, the application requires a contingency plan. What is the back-up plan should the facilities project be delayed and not ready in time for the start of school? (Page 85)	
Comment Only: The site chosen by the applicant is a small 2-acre site Zoned RMF1. The applicant should verify that a charter school may be placed on this site as it may be in violation of state statute 1013.36 which prohibits schools from being placed adjacent to railroad right of way and airport flight paths.	
Comment Only: Please be advised that the Sarasota County School Board does not provide funding to support start-up costs for facilities. Applicants of approved charters must submit a grant application to the FLDOE for a competitive "start-up" grant award.	

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

Statutory Reference(s):
s. 1002.33(20)

Evaluation Criteria:
A response that meets the standard will present:

- A transportation plan that will serve all eligible students.

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

Strengths
HUCLA proposes to contract with the School Board for transportation services. (Page 87)

Concerns/Weaknesses:
Although the school plans to contract with the district, the application must present a transportation plan so that it is evident the applicant understands the requirements. The plan presented is vague. It addresses F.S. 234 but does not address SREF requirements. (Page 87) The proposed budget for transportation will not cover all of the school's transportation costs. While it is accurate that the transportation revenue covers 40%, the school must plan to cover the remaining 60% of the transportation costs. (Page 87 & Appendix 17.A)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
40% is average for the district. What is the anticipated percentage for the 2.5 mile radius surrounding the school? (Page 87)	

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	☐	☒	☐
Final	☐	☐	☐

Strengths
HUCLA will utilize district services for food and nutrition services. NSLP & NSBP is addressed. (Page 88)

Concerns/Weaknesses:
Based on the facilities plan (discussed in Section 14 of the application), there are no core facilities to accommodate meal service. (Page 84 & Appendices 14.A, 14.B)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Comment: HUCLA may want to consider the provision of a supper program.	

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

Statutory Reference(s):
s. 1002.33(6)(a)(5); s. 1002.33(6)(b)(2)

Evaluation Criteria:
A response that meets the standard will present:

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

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

Strengths

Concerns/Weaknesses:
Budgetary projections are not consistent with all parts of the application. HUCLA's proposed Educational Plan and Proposed Organization cannot be supported by the start-up and operational budget detailed in the Business Plan. The projected sources of revenue and expenses will call into question the financial viability of the school. The budget presented contains a first year deficit of $449,879. The budget also has an estimated amount of $120,000 from the local voted millage (referendum). The budget should be based upon the revenues received through the Florida Education Finance Program, which should <u>not</u> include the voted millage. (Attachment 17.A) The startup budget projects no revenue. (Page 89) The budget does not contain the 5% administrative fee that is due to the district.

There is no expense associated with using the district transportation department for busing. There is a footnote "(f) Calculated to be a monthly payment of $19,239.86, based on a $4,000,000 loan for 30 years, at 4.06%, or $230,878 annually." There is no explanation and the amount is not included in the budget.

The explanation provided regarding the strategies the governing board will use to address revenue shortfalls lacks meaningful detail. (Page 90)

The applicant did not provide verification of any fundraising monies that are to be in the school's start-up or operating budgets. (Page 90 "F") There is a statement that the governing board has determined that the school will need an additional $500,000 of capital. It is then stated, "What we have determined is that most of the organizations that support the work of charters require that the charter be established before a financial commitment of support can be obtained." The application requires a plan on how the additional funds are going to be raised. (Attachment 17.A – Budget; Page 90)

It appears that the school plans to offer a summer school program (see the Commitment to Excellence Form reference in Attachment 13.E), however, funding for summer school is not specified in the budget. (Attachments 13.E, 17.A)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Comment: Please be advised that the local voted millage (referendum) should not be considered in the school's budget.	

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	☐	☒	☐
Final	☐	☐	☐

Strengths

Concerns/Weaknesses:
It is not clear that internal controls are appropriate. It appears the Treasurer is both depositing funds and preparing the payments. There should be a separation of this function to have adequate internal control over funds. (Attachment 18 – HUCLA Financial Controls and Procedures) There is no reference to who has the responsibility for bank reconciliations and the preparation of monthly financial reports. (Attachment 18 – HUCLA Financial Controls and Procedures) The application does not list all the required insurances or does not specify appropriate coverage limits. (Page 91)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Who is the Treasurer? There is no job description and it is not listed as budgeted staff. (Attachment 17.A) Please clarify.	
What is the planned coverage for Errors and Omissions insurance and for Auto Liability insurance?	

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	☐	☒	☐
Final	☐	☐	☐

Strengths

Concerns/Weaknesses:
The action plan does not include the projected months/dates for the key activities listed. Student enrollment timelines on page 82 are not congruent with the action plan. Major operational items are not addressed. (Page 92)

Areas in Need of Additional Information and/or Clarification	Charter Applicant's Response
Please provide an action plan with a timeline (month/year) for all of the essential activities and operational implementation requirements that must occur prior to the opening of a new school.	