

Before the Florida State Board of Education

In re: Denial of Somerset College Prep Academy Middle School
High Performing Replication Application 2015

Notice of Appeal

Somerset Academy, Inc.,
APPLICANT/APPELLANT

v.

St. Lucie Public School Board,
APPELLEE

I. Names and Addresses of Parties

Appellant:

Somerset Academy, Inc.
David Concepcion, Board Chair
Bernardo Montero, President
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Miami, FL 33143

Counsel for Appellant:

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Date of Action:

September 22, 2015

Date of Denial Letter:

October 1, 2015

Receipt of Denial Letter:

October 2, 2015

I. **Introduction**

Somerset Academy Inc. ("Somerset") is a highly experienced applicant with an impressive record of success in the continuing operation of its schools. Opening the proposed school within Somerset's network, with SACS CASI/AdvancED accreditation, and as a high-performing replication of Somerset Academy Middle School MSID 5151 ("Chapel Trail"), the proposed school will implement the same best practices and quality standards proven effective in raising student achievement. For Sponsor to deny the Application after what appears to be a cursory review yielding unfounded accusations and reasons for denial inapplicable to a high-performing replication, is without cause, and insulting to the review process and the advancement of education through choice.

Pursuant to Section 1002.33 F.S., a high-performing charter school may appeal Sponsor's denial of its high-performing replication by submitting notice of appeal to the State Board of Education. Sponsor, not Applicant, has the burden to prove with clear and convincing evidence (i.e. highly probable or reasonably certain) an application for a high-performing Charter School does not materially comply with statutory requirements of 1002.33(6)(c)3.b.1, F.S. Sponsor has failed to meet its burden. Denial of Somerset's high-performing application is contrary to the best interests of the students, the school district, and the community, and for the reasons below, Somerset respectfully requests the State Board overturn the decision of the St. Lucie County School Board and remand the application with instructions to approve the application at this time. The State Board of Education must find that the application should be approved by Sponsor if reasons for denial set forth in the denial letter: (1) are not based on competent substantial evidence (clear and convincing evidence for a high-performing application); or (2) is not a statutorily required element of a charter school application.ⁱⁱ None of the reasons set forth in Sponsor's notice constitutes good cause to deny the application much less the clear and convincing evidence required.

II. **Procedural History**

1. On August 3, 2015, Somerset Academy Inc. submitted its charter application entitled "Somerset College Prep Academy Middle School" to replicate a high-performing middle school model.
2. On August 27, 2015, Somerset attended a Governing Board Interview to address questions
3. On September 22, 2015, the St. Lucie County School Board voted 5-0 to deny Somerset's High Performing Charter School application.
4. On October 2, 2011, Somerset received the Letter from the School District denying its application.
5. On October 27, 2015, Somerset appeals the decision of the St. Lucie Public School Board.

III. Summary of Alleged Deficiencies

1. Sponsor failed to show by clear and convincing evidence that Somerset's proposed school is not substantially similar to at least one of Somerset's high-performing charter schools, and fails to show by clear and convincing evidence that Somerset is not involved in the establishment and operation of the proposed school or is not significantly involved in the operation of replicated schools.
2. Sponsor has failed to show by clear and convincing evidence that the Applicant will not use the guiding principles or meet the defined purpose of a charter school, and misstates the standards.
3. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with the standard for target populations and student body.
4. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with the standards for School climate and discipline.
5. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Educational Program Design.
6. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for curriculum plan.
7. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Student Performance, Assessment and Evaluation.
8. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Exceptional Students.
9. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Governance.
10. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with the standard for Management.
11. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for ESP.
12. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Facilities.
13. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Transportation.
14. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Employment.
15. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Student Recruitment and Enrollment.
16. Sponsor failed to show clear and convincing evidence Applicant did not materially comply with application standards for Budget.
17. Sponsor failed to show by clear and convincing evidence that the Applicant did not materially comply with application standards for Financial Management and Oversight.

APPLICANT RESPONSE: Sponsor was required to articulate specific reasons in writing supporting its decision in an official notice of denial to Applicant and the Department of Education along with supporting documentation pursuant to F.S.

1002.33(6)(b)(3)ⁱ In its letter, (Exhibit 2) Sponsor does not specifically allege reasons for denial, and the letter fails to explain the clear and convincing standard Sponsor must prove, or how the Application allegedly did not materially comply. Instead, the letter attempts to cure deficiencies by referring to, and incorporating, the previously written Memorandum to the School Board (Exhibit 2.A.) and the Application Evaluation Instrument (Exhibit 2.B.) as cause for denial instead of as supporting documentation, creating a composite 44-page Notice of Denial. In order to preserve Applicant's rights, Applicant is left to guess the specific reasons for Sponsor's denial. This does not meet the requirements of 1002.33(6)(b)(3). An illegal and insufficient letter cannot support denial of an application. Sponsor's allegations do not comport with the Statute and neither does the denial letter. Accordingly, the denial letter should be stricken and the application approved.

Sponsor deprived Applicant of Procedural Due Process by denying Applicant a meaningful manner of review of its Application.ⁱⁱ Due Process guaranteed by the 14th Amendment requires that review occur at a meaningful time and in a meaningful manner.ⁱⁱⁱ For example, Sponsor rated 6 sections of the Application as having met or having partially met the standard, but noted only one strength throughout the entire application. Class size, despite being identified as the only strength, was included in a section rated as not meeting the standard (Ex. 2.B., pg. 5). In addition, the School Board meeting regarding the application was reportedly published as canceled, (Ex. 4, pg. 59). This lackluster and disingenuous review denies due process and questions Sponsor's entire review of the application. Sponsor failed to: demonstrate a lack of bias; provide Applicant a meaningful, fair review; and demonstrate that the Application was actually reviewed as high-performing by denying the application for reasons beyond those applicable to high-performing applicants. The opportunity to be heard "must be full and fair, not merely colorable or illusive."^{iv} In the alternative, and to preserve its rights, Applicant responds as follows:

- 1. Sponsor failed to prove clear and convincing evidence Somerset's proposed school is not substantially similar to at least one of Somerset's high-performing charter schools, or that Somerset is not involved in establishment/operation of the proposed school, or is not significantly involved in the operation of replicated schools.**

The Application ("App") submitted by Somerset, (the "Applicant"), pursuant to Sections 1002.331(3)(a); 1002.33(6)(b)3.b., F.S., is a replication of Chapel Trail, a high-performing charter school. Pages 20-24 of the App details the high-performing status of Somerset. It is clear the App is submitted by Somerset pursuant to 1002.331 to establish and operate a new charter school to substantially replicate Somerset's educational program, specifically, the existing Chapel Trail. (App, 20). Four pages of the App are dedicated to an in-depth review of Somerset's qualifications as a high-performing charter and how the proposed school will substantially replicate the existing school design. (App, 20-24). Section 1002.331, F.S. states:

"An applicant is considered to be replicating a high-performing charter school if the proposed school is substantially similar to at least one of the applicant's high-performing charter schools and the organization or individuals involved in the establishment and operation of the proposed school are significantly involved in the operation of replicated schools."

The App bases the proposed school's replication on substantial similarities in several areas including educational model and governance by the same organization. Chapel Trail is co-located on the same physical property as Somerset's high-performing High School. The proposed school will be a middle school co-located on the same campus as a Somerset "A" rated High School. Sponsor contends a valid verification letter was not provided by the Commissioner of Education classifying Applicant as a High-Performing replication, because the letter is dated in 2011. This is inaccurate. Pursuant to Section 1002.331(5), F.S., the Commissioner of Education, upon request, shall verify that the charter school is a high-performing charter school and provide a verification letter, and determines whether the charter school continues to meet the high-performing criteria on an annual basis. By law, the charter school maintains its high-performing status unless the Commissioner determines the charter school no longer meets criteria and declassifies the charter school. To date, and since receiving high-performing status in 2011, Chapel Trail has maintained its high-performing status. Sponsor believes Applicant cannot be a replication since Somerset takes pride in each of its schools being unique, citing nuances in areas of the education plan, and since Somerset's schools serve different populations and demographics and have students with different needs. There is no "one size fits all" prescription of replication as Sponsor suggests. A substantial replication is not a carbon copy, nor should it be. The 5th DCA held: "[T]o be 'substantially similar' within the meaning of Florida Statutes, a charter school must have the same characteristics and be alike in substance or essentials to the school it is replicating." The proposed school is substantially similar to the existing school in that the proposed school consists of the essential characteristics of the existing school, and is alike in substance/important concepts to the existing school. Throughout the App, and during the Interview, Applicant discusses replication of Chapel Trail, and states the educational program is "mirrored" after Chapel Trail, (See App at 1, 10, 20, 28, 40-41, 52, 59, 82 and 121.) Strategies for replication of the existing school, including outreach and guidelines to manage and run the school, are documented throughout the App and the Interview, (See App, at 2-4, 10, 22-24, 29-30, 37-68, 125; See Also Interview at 8-10; 39-43). Applicant details additional strategies for replication of Chapel Trail's design including but not limited to the following Sections of the App: 3, implementing the same core values and beliefs of Chapel Trail and its existing programs; 9 and 11, utilizing team of experts with ownership of Somerset educational program as consultants to continuously provide training; 8 and 13, adopted uniform/common Somerset expectations of student behavior and parental involvement; 18, policies for financial management and oversight used at Chapel Trail and ALL Somerset's, (App, 2). This evidences Applicant's substantial similarity to Chapel Trail. There is no evidence to the contrary.

Sponsor further alleges the Education Plan was not substantially similar in school mission, target population, educational plan, curriculum, and assessment section. Having some unique elements to school design does not frustrate replication or substantial similarities clearly evident between the schools. All Somerset schools share a common philosophy of student expectations, a unique code of excellence, an expectation of parental commitment, and collaborative management infrastructure derived from its first school, Somerset Neighborhood, (App, 2). All Somerset programs have replicated the "neighborhood" paradigm in school design and management practices, including Chapel Trail and the proposed school, from facilities design to academic program approach, (App, 2). Every Somerset school is intended to serve the immediate needs of its local community, (App, 2). Sponsor criticizes Applicant for serving a different student population than the existing school, and ensuring that the school's services are tailored to meet the needs of its population, and attempts to use this as a failure of the App. This, however, is Applicant following the law with respect to admissions and student populations. Pursuant to section 1002.33(10)^{vi}, a charter school is open to any student residing in the school district, subject to statutory preferences and limited enrollment categories. Accordingly, the App states Somerset's intent to serve the needs of the community, and will take into consideration the best practices for the local demographic, (App, 2). It is expected that geographic differences in the proposed locations will result in a different student population in the literal sense, this does not change the common strategies used to serve these demographics. While the populations may be unique, Somerset's and Chapel Trail's mission, vision, and values will be implemented with fidelity in every aspect of the proposed school, and the Somerset philosophy is evident throughout. The mission of Somerset's network is included at page 5, and the proposed school has a site-specific mission tailored to the needs of the anticipated students, the community, (App, 5). Somerset as a network has a common vision, purpose, core principles, and set of beliefs which have been adopted system-wide and are replicated from Chapel Trail to the proposed school, (App, 5). Finally, Sponsor states a general disbelief that Somerset and individuals from the existing school will participate in the establishment and operation of the proposed school. This contention is disingenuous. Chapel Trail, and the Somerset Governing Board, have already contributed to the establishment of the proposed school and have demonstrated a commitment through assistance with the App, responses to Sponsor questions, and by physically appearing to meet with Sponsor at the Applicant interview. As required by the replication standard pursuant to statute, the President of Somerset Academy Inc., Bernardo Montero, demonstrates his commitment to the proposed school and pledges to deploy staff members and experts to the proposed school and speaks directly to the collaboration with the proposed school to instill the vision of Chapel Trail and implement its programs, (Ex. 3, pg. 11). Sponsor inaccurately stated the replication standard. Correctly stated, the standard for replication is that the organization involved in the establishment/operation of the proposed school be

significantly involved in the operation of *replicated schools*. At the time of application, Somerset had 16 high-performing schools and had successfully replicated its schools into 48 other high quality programs in multiple counties, (See App at 1 and 30-35). Board members speak to the commitment of the Board and the network to share resources, foster and nurture the development of the proposed school and provide ongoing support between the schools in the same manner it has for other Somerset replicated schools, (Ex. 3, pg. 10-11, 17-18, 24, 30-31). Applicant indicates it will utilize Somerset's educational program consultants to provide continuous training to the proposed school's administrators and staff, and they will be providing ongoing communication, training, and support for the school's changing operational needs, (App, 2-3). Somerset's Board is ultimately responsible for its schools' operation and governance, (App, 2-3). Somerset governs Chapel Trail and will govern the proposed school as well, (App, 2-3). It has been said that past performance predicts future behavior. Somerset has a strong history of support and success; the Board is committed to all of its schools. THIS school is no different. The Board spoke to this directly; Sponsor has no reason to find otherwise.

2. Sponsor failed to prove clear and convincing evidence that Applicant will not use the guiding principles or meet the defined purpose of a charter school, and misstates the standards here in several respects.

Sponsor alleges Applicant did not detail how it will meet the guiding principles or defined purposes of a charter school, is not innovative, does not offer something different, and does not replicate Chapel Trail's mission. Applicant states the guiding principles and purposes and discusses each individually and in detail, (App, 6-12). Applicant identifies each principle/ purpose individually, and for each, articulates several specific, measurable, realistic, and attainable strategies which relate directly to the school's operations and which are currently in place at the existing school. The uniform mission, vision, and purpose of the Somerset network and all its schools is detailed, and includes Somerset's core principles and beliefs, (App, 5). Somerset identifies student learning and achievement as paramount, measured by other stated core principles including data assessments to drive curriculum and educational focus; research-based curriculum; continuous improvement; teacher training and mentoring, (App, 5). Sponsor alleges the proposed school is not innovative. It is not a statutory requirement for a charter school to be innovative, rather that the school *encourage* innovative learning methods and strategies, (emphasis supplied), see section 1002.33(2)(b)3. This is not limited to charter schools; ALL schools should encourage innovative learning methods. Sponsor states it is innovative and progressive with its choice policies, having approved so many charters as they have, currently 5 or 6. (Ex. 4, pg. 4, 71, 69). Somerset, though, has always been on the edge of innovation, and its Neighborhood school, opened in 1997, was among the first charter schools to open in the State of Florida. Somerset has developed a multi-tiered system of management, assessment, instruction, and professional development that integrates technology within curriculum to achieve increased performance over all student populations and sub-groups, (App, 10). Additional innovative

methods are detailed and listed throughout the App on pages 10, 11, 23, 30, 36, and 37 and examples of innovative lesson plan activities begin at Page 82. In addition, Board Members Ana Diaz and Lourdes Isla spoke about innovation and uniqueness of Somerset and the proposed school (Interview, 8). Innovation was further addressed in the Interview by Chapel Trail's curriculum specialist, Ms. Fye, Mr. Montero and Ms. Isla, reinforcing Chapel Trail's and the proposed school's college preparatory focus beginning in middle school and the use of integrated technology in the curriculum (Ex. 3, pg. 11-14). Sponsor alleges Applicant did not identify particular need for the proposed school "beyond offering choice in a generic sense", and believes there are diverse educational opportunities already provided to middle school students within the School District, (Ex. 2.B., pg. 4). This demonstrates Sponsor's impetus for denial: it is clear Sponsor does want a high performing charter middle school. There is no requirement in law or the App that Applicant demonstrate outstanding need in order to be approved. The purpose of a charter school is to offer parents in a community an educational choice. Applicant explains its rationale for the program stating its paramount concern is that this school will provide parents a *meaningful* choice in middle school educational options which currently does not exist, (App, 13). As seen in the chart on page 20 of the App, there is only one stand-alone middle school option within a 5-mile radius of the proposed school. All other middle school offerings are configured in a K-8 model. Further, there is currently only one middle school in the entire District co-located with a high school. At the time of Application, they reported a total enrollment of 1900 students, of which 787 were middle school students (App, 15). The proposed school has a projected enrollment of 375, is co-located with a high school, and offers a high-school pre-college preparatory curriculum - a much different educational environment than currently available in this District, (App, 15). Legislative intent regarding educational choice is clear:

"expanding educational opportunities and improving the quality of educational services within the state...[and that] ensuring that all parents, regardless of means, may exercise and enjoy their basic right to educate their children as they see fit... [and that] expanding educational opportunities and the healthy competition they promote are critical to improving the quality of education in the state and to ensuring that all children receive the high-quality education to which they are entitled.^{vii} It is a statutory purpose of Charter schools, in fulfilling choice to, "provide rigorous competition within the public school district to stimulate continual improvement in all public schools."^{viii}

Applicant uses the guiding principles, is innovative and clearly fulfills the statutory intent of a charter school. There is not clear and convincing evidence of non-compliance with any statutory requirement. The Application should be approved.

3. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with the standard for target populations and School climate and discipline.

F.S. § 1002.33(7) applies to approved charter applications entering the contract phase and does not govern the application process. Sections, 1002.33(7)(a)(1) and (7) specifically state that, "the *charter* shall address and criteria for approval of the *charter* shall be based on the school's mission, the students to be served, and the ages and grades to be included," and

"the admissions procedures and dismissal procedures, including the school's code of student conduct." (emphasis supplied). As a high-performing replication, these allegations are not cause for denial. Nevertheless, Applicant has provided a response which fully answers to the model application. Sponsor alleges Applicant is not replicating the existing school because the demographic makeup of the proposed school will be "markedly different" than Chapel Trail and further alleges Applicant "may be targeting discreet student populations which may include impermissible criteria." Applicant expects its target population to be students with a college-preparatory focus, the same target population at Chapel Trail. Additionally, the proposed school is promoting a small sized school, conducive to school safety and an academically rigorous environment students need to succeed in high school and college, (App, 15). Both the proposed school and Chapel Trail strive to reflect racial and economic diversity, as well as ESE/ELL populations reflective of the surrounding public schools. Here again, Sponsor misunderstands replication. To suggest populations of 2 schools nearly 150 miles apart should be identical would run afoul of Somerset's Admission policy which is in compliance with federal and state anti-discrimination laws and the Florida Educational Equity Act, (App, 13). Applicant details the admissions process, including enrollment preferences and limited enrollment categories, and includes the data which informed Somerset's enrollment projections, (App, 13,14,16-20). Applicant also includes a full plan for student recruitment and enrollment, (App, 174-175). Somerset understands the demographic of the area and the target population for its school and informed its research and developed its plan based on the existing high-performing Chapel Trail model. Sponsor apparently disagrees with Somerset's business decision based on sound principles, thorough research, and its own expertise having successfully operated 57 charter schools, 48 in Florida. This pretext for denial is pure conjecture and bias, and not reasons upon which a legal denial may be based.^{ix}

Sponsor takes issue with Applicant's inclusion of statutory limited enrollment provisions provided for all charter schools in Section 1002.33(10)(e), F.S., whereby a charter school may limit enrollment to target certain student populations, including "students residing within a reasonable distance of the charter school." The Interview and the App both explain that the Enrollment Limitation serves the purpose to minimize any traffic impact caused by the school and ensure that the school is available to serve the residents of the neighborhood where the school is located, (App, 14; See Also Ex.3, pg.18-19). There is ample documentation that Applicant understands statutory preferences and limited enrollment categories schools may use in their enrollment practices. Finally, Sponsor alleges the proposed school does not have similar discipline procedures to Chapel Trail, alleging specifically that Applicant includes admissions and dismissal procedures used by the school as agreed by Sponsor. Sponsor states that the charter does not have authority to implement dismissal procedures not agreed to in the Charter. As noted above, admissions and dismissal procedures, including the school's code of conduct are issues the Charter

shall address, see Section 1002.33(7)(a)(7). Sponsor does not have the authority to deny a high-performing application for reasons outside of the limited statutory reasons in 1002.33(6)(c)3.b.^x Sponsor has implemented and/or approved similar admissions criteria in the county. Applicant is personally aware of a school in the district with the same 2.0 grade policy^{xi}. It is anticipated, at the time of contract, the proposed school will include enrollment/dismissal standards pursuant to Section 1002.33(10)(e), F.S.^{xii} Regarding Sponsor's feigned concern of replication, Bernardo Montero, clarified at the Interview that Chapel Trail indeed had a similar requirement to the proposed school's 2.0 GPA admission requirement stating it's a requirement for students to perform, (Interview, 16). It is clear the schools have substantially similar requirements. The proposed school enforces this standard beginning with the admissions process, while Chapel Trail enforces this standard through academic contracts. (App, 141; Ex.3, pg.16) Sponsor further alleges Applicant's dismissal policies do not meet standards as there are no academic supports identified prior to dismissing a student. Academic supports, utilized with success at Chapel Trail, are a main component of Applicant's educational plan and are detailed in the App and include: PLC's, direct instruction, personalized instruction, counselor's, cooperative learning, information processing strategies, targeted tutoring, etc., (App, 24-27). Applicant has a sound plan for classroom management and student discipline, making clear that a collaborative problem solving process is utilized to address learning challenges and targeted interventions are implemented, (App, 136). Applicant describes a team/discipline committee, which Sponsor inaccurately states was not included in the budget. The budget detail, lists Pupil Personnel Services and includes salaries for a "counselor", and is referenced in Line 27 on the budget narrative. (App, 310, 313). A counselor is included in each of the budget monthlies (App 318, 321, 324, 327, 330).

As stated, targeted interventions are implemented for all students, and prior to any student dismissal. Students not meeting state standards are identified, and measures for remediation will be implemented based on individual needs. (App, 135). Remedial students or students failing one of more classes, have access to supervised study time and tutoring during lunch/after school/weekend to accelerate progress, reinforce basic skills and preview new material, (App, 11-12; 28). Additional interventions including supplemental and/or additional instruction, course recovery, and/or supplemental programs for advancement and/or remediation are further detailed in the App at: 7, 10-12, 22, 29, 40, 65, 89, 120, 135, 307. It is further disingenuous to state that the proposed school is using a Parent Contract other than one substantially replicated from Chapel Trail's Parent Contract. The two documents are identical with 2 minor additions to Chapel Trail's contract: one regarding traffic patterns which was required by the local jurisdiction, and the other a minor modification to the unauthorized items policy, allowing cell phones in certain circumstances. In all other respects the contracts are alike.

4. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Educational Program Design.

Sponsor alleges Applicant does not explain how they replicate Chapel Trail and further alleges Applicant does not provide information as to how the education program is innovative. Ample evidence of Applicant's educational program is provided throughout the App, specifically, pages 21-35, evidencing how Applicant provides information in reference to instructional techniques incorporated throughout the curriculum in order to maximize learning and successful attainment of learning objectives. These educational goals and the detailed program, clearly implement the mission of Chapel Trail and Somerset Academy Inc. at the proposed school. The annual calendar and instructional time, including the coursework required by the state of Florida for all middle school students to progress to high school are an integral part of the Educational Program Design for the proposed school, as is the current practice of Chapel Trail. (App, 21). The evaluation instrument suggests that meeting these state standards (which all of Somerset's schools meet) is inconsistent with replication and further identifies the provision of state-required courses as an application deficiency. (Ex.2B, pg. 7). Somerset Academy has no response to the implication that it should provide an educational program that does not meet state standards. This is yet another example of the colored review Sponsor gave to Applicant's high-performing application. Many methods of the program philosophy "High Expectations/High Achievement" are described in detail including: differentiated instruction, direct instruction, group frameworks and collaborative learning and the rotational instructional models as the primary instructional methods, (App, 22). The proposed school will implement the tenets that have made Chapel Trail successful: a standards-based curriculum infusing a thematic approach to integrate core areas of study such as mathematics, literacy, English language arts, science, and social studies; appropriate assessments for learning utilizing the diagnostic-formative-summative assessment cycle model; data-driven high quality differentiated instruction; supplemental programs for student advancement and/or remediation; and support for teachers and ongoing professional development. "Unique" methods and "innovative resources" to augment learning are further discussed in detail at page 23 of the App and includes, among others recognition that students learn in a variety of ways and discusses giving students the opportunity to learn through different techniques. Pages 24-27 contain a detailed explanation of specific instructional techniques employed at Chapel Trail and how these techniques align with Somerset's mission and which are incorporated throughout the proposed school's curriculum in order to replicate Chapel Trail's high-quality. These include: Personalized Instruction, Target Tutoring, Professional Learning Communities, Vertical Planning, Department meetings, Leadership meetings, Counselors, Scaffolding, Cooperative Learning, Academic Excellence and Leadership Development, "Pull and Push" Methods, Home Learning, Vertical and Horizontal Alignment, Community Partnerships, Parental Involvement, Service Learning, among others. (App, 27-29). Sponsor alleges Applicant has not been innovative, yet innovative techniques

and strategies are documented throughout the App. This is the first college preparatory charter middle school to propose co-location with a high-school in this county. Applicant states that the proposed school will implement the same principles as Chapel Trail, and in the same manner stating, "these principles are best implemented through a curriculum that: 1) requires active engagement by doing (project based learning, Spring Board, kinesthetic activities, etc), 2) engages a broad range of learning modalities (TCI, HMH, RIM, etc), offering students multiple ways to demonstrate learning, 3) requires the use of imagination, creativity and application of knowledge, 4) inspires, motivates students, especially those who may struggle in other content area classes, 5) develops personal and social skills such as communication, cooperation, discipline, and perseverance, all of which will help to prepare students for high school and college, ensuring a well-rounded, community minded individual, (App at 28-29). Guided by these principles, our program, [Chapel Trail], aims to achieve three learning goals: academic accomplishment, intellectual curiosity and civic engagement resulting in responsible citizens," (App, 29). Applicant further details unique and innovative strategies aimed at student achievement throughout the application, and summarizes this at page 30, including partnerships with community stakeholders, local universities, and implementation of interns for collaborative learning experiences; the utilization of Project CRISS, SpringBoard, MyAccess, Study Island, Turn It In, Reading Plus, Reading Counts, HMH, TCI, etc; (App, 30). Applicant has more than demonstrated innovation and unique aspects of the Educational Program Design and has demonstrated how the proposed school is replicating the program already in place at Chapel Trail. Finally, Sponsor believes Somerset's capacity to replicate is not credible, even though Somerset as an institution has successfully replicated its model more than 40 times; Somerset has an 18-year history of successful operations and is collectively an "A" district among its schools, and has achieved increased performance network-wide. (App, 30). Sponsor's allegations are baseless; the App must be approved.

5. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for curriculum plan.

Sponsor states that the curriculum plan for the proposed school is unclear and internally inconsistent, and that Applicant does not provide sufficient information about Chapel Trail's curriculum plan, making it impossible for Sponsor to confirm that Applicant's plan is aligned with Chapel Trail. Applicant has included curriculum standards in the App. Curriculum is described fully and in great detail, (App, 36-38) and instructional methods are detailed as well, (App, 9). Specifically,

"The School, in accordance with the law, will improve student learning and academic achievement through a variety of means that include but are not limited to direct instruction in the classroom, differentiated instruction, pull outs as needed, home learning assignments, lunch tutoring, after school tutoring, Saturday preps, online support systems, supplemental software, teacher access via school based text system, email, and message boards on the interactive teacher webpages, etc, as does #5151." (App, 9).

By Sponsor's own admission, substantial similarities between the proposed school and Chapel Trail "cannot be determined," (Evaluation Instrument, 9). As such, Sponsor has failed to meet its burden of proof demonstrating clear and convincing evidence that Applicant has not materially complied, and the application should be approved. In the alternative, it is Applicant's assertion that the App has clearly demonstrated the ability to replicate the Somerset model and states in the application factors that show the organization's capacity to replicate the school model such as:

"Implementing the same instructional methodology of the existing program (Section 3-4), Adopting the research-based educational concept for the existing program (Sections 3-4) Utilizing the team of experts (who have ownership of the Somerset program) as consultants who continuously provide training to the proposed school's administrators, faculty and staff (Sections 9 and 11), just to name a few examples."

Any reference to Somerset as a system, denotes practices in place system-wide, including Chapel Trail and the proposed school. The success in Somerset's ability to replicate has been its success as a system, (App, 3).

Specifically referencing Chapel Trail, Applicant outlines its plan and includes a litany of methods in which the school will meet and exceed high standards of achievement, including, among other reasons: implementing a rigorous curriculum; offering advanced and honors classes in grades 6-8; offering college Board's pre-AP curriculum (Springboard); curricula specifically designed to meet student needs through data-driven differentiated instructional model; and indicates that all of these methods are employed by Chapel Trail, (App, 6). In addition, Applicant, includes the following high standards for students replicated from Chapel Trail: Providing a vigorous, educational program; Delivering a dynamic school curriculum, including emphasis given to student-centered instruction towards student mastery of the Florida Standards; complement and enhance classroom studies through premium curricular and technology infused extra-curricular programs, Employing mechanisms to continuously monitor, evaluate, and improve curriculum to achieve continuous student improvement year to year, Utilizing strong technologically rich academic programs and tools to assist and increase a multisensory learning experience, (App, 6). Applicant discusses offering courses at honors level, such as SpringBoard, which has also been used at Chapel Trail, (see App, 9); and the use of approved academic programs that mirror Chapel Trail such as the use of an HMH Collection to meet the needs of lower level students, (see App, 10). Applicant also references support software replicated from and evaluated by Chapel Trail's program, including Study Island, My Access and Scholastic Reading Counts, (App, 11).

Further evidence of replication is found where Applicant states:

"In replicating Somerset Academy Middle School #5151, the School will follow some of the tenets that have made that school successful, including, but not limited to: A standards-based curriculum infusing a thematic approach to integrate core areas of study, such as mathematics, literacy, English language arts, science, and social studies; Appropriate assessments for learning utilizing the diagnostic, formative, summative

assessment cycle model; Data-driven high-quality differentiated instruction; Supplemental programs for student advancement /remediation; Support for teachers and ongoing professional development". (App, 22). Applicant lists instructional techniques, utilized with success at Chapel Trail that "will be incorporated throughout the curriculum in order to maximize learning and successful attainment of learning objectives and replicate quality" on pages 24-27.

"Instructional strategies utilized at #5151 and other Somerset schools that will yield the greatest results" at the proposed school are listed on pages 38-40. Applicant details specific curriculum being used at Chapel Trail and offered at the proposed school, broken down by both course and subject in great detail, including: English Language Arts/Reading/Writing is (39-49; 69-81); Math (51-55); Science (55-58); Social Studies, including character education, (58-64); Health and Physical Education, (81-82); Music, art and other electives (83-84.), (See App, 39-84). Methods of delivery curriculum are described on pages 64-68. Text books used at Chapel Trail are indicated within each subject area, and identified as texts to be used at the proposed school.

Additional evidence of Applicant's understanding and implementation of curriculum based on Chapel Trail's replicated model are the processes in place to support delivery of the curriculum and includes, but is not limited to, discussion of the following: continuous review of the curriculum to ensure a year's worth of learning; research based instructional practices, staff development through implementation of PLC; afterschool, lunch, and Saturday tutoring for remediation and acceleration; Support for Curriculum Delivery; Instructional Strategies to be utilized throughout all subject areas; Integration of Technology; etc. It is clear by the above, that Applicant meets the standard required pertaining to Florida Standards. There is no good cause to deny a charter school application where the application has met all the statutory elements^{xiii}. The inclusion of this as a reason for denial, is unwarranted, and without supporting evidence. This does not constitute clear and convincing evidence of non-compliance with any statutory requirement. Application should be approved.

6. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Student Performance, Assessment and Evaluation.

Sponsor states the proposed school's expectations of student performance is not aligned with student performance at Chapel Trail and does not align with the guiding principles. A discussion of how Applicant uses the guiding principles has been included in Section 2, above, and will not be repeated here. Students at Chapel Trail meet or exceed state and district averages by an average of 10% points, (Ex.3, pg.28-29). Applicant addresses and sets AMOs, and states the proposed school's student performance expectation is to "meet or exceed the District and/or State average, whichever is higher...", (App, 87-88, 97). Applicant includes specific goals regarding pass rates including, 7% points higher than state on 8th grade Science FCAT, 2% points higher on Biology EOC, 5% points higher on Civics EOC and 2% points higher on US History EOC, (App, 88). Learning gains are defined and addressed in detail, (App, 88). Somerset clearly demonstrates an understanding of the state accountability system as evidenced by the high quality schools it operates, (App, 1, 30-35). The goals identified are

baseline and will be adjusted based on data from the first assessment period, but is fair based on historical data for first year charter schools. Sponsor states Applicant's expectation of student performance is not aligned with "the guiding principles that charter schools are required to meet." Charter schools are not "required to meet" these principles, but should "use" and be "guided by" them^{xiv}. Somerset implements the guiding principles throughout its system. As a high-performing replication, Applicant states that the expectation is to meet or exceed state or district averages. Since Chapel Trail consistently exceeds state and district averages, Applicant maintains that the guiding principles are being used in a manner substantially similar to Chapel Trail. Contrary to Sponsor's assertions that Applicant does not demonstrate an understanding of testing and assessment regimes, Applicant states it "will participate in all applicable components of the Florida State Accountability System as required by Florida Statute, as well as many other age-appropriate research-based assessments," (App, 12). Further, Applicant intends to utilize data from assessments to drive instruction and provide remediation and differentiation, (App, 6, 8-11, 22-24, 38, 65)

7. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Exceptional Students.

Exceptional Students is found in statute in Section 1002.33(16)(a)(3), F.S., which states in relevant part, "a charter school shall be in compliance with...those statutes pertaining to the provision of services to students with disabilities." Somerset agrees that the proposed school, and every Somerset school, fully complies with the law regarding the identification and provision of services for Exceptional Students. However, as a high-performing replication, these allegations are not statutory reasons for denial of a high-performing application. Sponsor alleges Applicant does not clearly define the students Applicant intends to serve, and further alleges Applicant will not serve students with moderate to severe disabilities. These allegations are false and offensive. Applicant defines the students served and services provided, including students: with speech or language impairment; Specific Learning Disabilities; Other Health Impairments; Emotional Behavioral Disabilities; Deaf/Hard of Hearing; Developmental Delays; Dual Sensory Impairments; Intellectual Disabilities; physical therapy and occupational therapy needs; orthopedic impairments; traumatic brain injuries; and visual impairments, (App, 109-111). Nowhere does Applicant state that it will not serve students with moderate to severe disabilities. Somerset is offended by any assertion that it would do anything less than follow the law. Governing board member, Ana Diaz, states that the ESE services will be dictated by the student's IEP, (Ex.3, pg.31). Sponsor alleges the staffing plan and budget do not support services described. Line 22 of the Budget Detail (and Line 16 of the Budget Narrative) reflects contracted professional services, to include physical, speech, language and occupational therapists, while line 35 references counseling and psychological services. In addition, Line 29 of the Budget Narrative references counseling and psychological services. The Staffing Plan allocates for ESE personnel in lines 17, 25, and

76. Further, the App discusses the services provided to Exceptional Students in great detail at pages 102-127. Federal Compliance with ESE is discussed at page 68; instructional minutes for ESE students is found at page 43; ESE transportation is found at 182; and other ESE contracted services are addressed at 188. The school states it will provide a continuum of services to students, (Ex.3, pg.37). The App states at page 118 and throughout, that students with disabilities may receive accommodations in the General Education setting as deemed appropriate or the team will create custom accommodations to meet the needs of the students within the least restrictive environment.

8. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Governance and Management.

Sponsor alleges "serious" deficiencies in Somerset's governance plan and further alleges a lack of an effective management structure. There is no basis for these allegations. As a high-performing replication, the allegations regarding Governance and Management are not statutory cause for denial. Somerset Academy Inc.'s board fully complies with the Sunshine law, and Florida Statutes applicable to charter schools in all respects. Sponsor alleges Applicant would not be able to replicate an existing school design by opining that since Board members live outside of St. Lucie, and since Somerset Academy Inc. operates over 40 schools in multiple Florida counties and three other states, they would not be able to effectively manage these schools. It is well-settled in Florida that there is no residency requirement as to any number of Board Members of a Charter School. Section 1002.33(7)(d)1, F.S. states,

"The sponsor may not require that governing board members reside in the school district in which the charter school is located if the charter school...appoints a representative [who resides in the school district] to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes."

Somerset is in full compliance with law requiring the appointment of a local representative in each district it operates, and discusses this, (App, 152-153). Sponsor expresses concern with the governing board holding at least two public meetings per school year in the school district. This is conjecture.^{xv} Applicant describes Somerset's compliance with Sunshine law, by holding a minimum of 2 meetings per year in the district which will be noticed, open, and accessible to the public and attendees will be provided an opportunity to receive information and provide input on school operations, (App, 148). Applicant is fully compliant with current legislation, and will continue to provide oversight of all Somerset Schools in the manner required by law. Sponsor falsely alleges Applicant does not have administrative support. The Corporate Documents for Somerset Academy Inc., clearly reflect Somerset's corporate President, Vice-President, and Treasurer, and as noted above, each Somerset school has a local representative. Applicant describes how the Principal and school-site administration handle day-to-day on-site operations including curriculum, instruction, classroom management, discipline, faculty and staff evaluation, testing, support

services, etc, (App, 154-155). With this structure, Somerset operates over 40 successful charter schools in multiple counties in Florida (App, 4). Board minutes posted on Somerset Academy Inc.'s website and the Board Schedule, attached as Exhibit 5, reflect a minimum of 12 meetings each during the 14-15 year and the 15-16 year. In addition, Board members indicated that regular publicly noticed strategic planning meetings occur, (Ex.3, pg.40). These were noted as being longer than board meetings and assist the board in addressing school needs and principal concerns at an individual, more personal level, (Ex.3, pg.41). Sponsor also inaccurately states that the proposed school shows a half-time principal and no other administrative support. The budget detail clearly states multiple times "Salaries in the staffing plan are for Full Time Equivalent (FTE) instruction positions. Individuals may be utilized for other functions." Sponsor criticizes Applicant's budget for indicating the principal's salary is .5. This does not indicate the principal is not full-time. Due to the size of the school in its first year, the .5 indicates the adjustment in salary due to limited FTE. As the school grows, the budget indicates that the salary becomes 1.0. The budget included indicates 14 total employees, including instructional staff, pupil/personnel services, and a school registrar. Staff reflected in the budget is clearly adequate as further evidenced by Sponsor's awarding Applicant it's only application strength of student: teacher (class size) ratio. It is expected that staff will play a dual role in assisting in administrative and operational duties, as necessary. This is a common practice of Charter Schools in start-up mode until FTE is sufficient to support additional staff. The plan meets the needs of school operations. There are no statutorily mandated ratios pertaining to Administration or office staff.

Somerset has demonstrated its ability to comply with the standards regarding governance and management, at the corporate and school-based levels. Somerset Academy, Inc.'s Governing Board is the ultimate policy-making body, hires and oversees the Principal, and has the responsibility for the activities and affairs of the corporation, and of operation and oversight of the school including but not limited to curriculum, operational policies, academic accountability and financial accountability, (App, 143-144, 154, 167). Applicant has never been cited by a sponsoring county for not being in compliance. Somerset Academy Inc. was awarded SACS CASI/ AdvancED accreditation because Somerset has demonstrated that it has the proper systems in place to ensure that its schools have the proper level of oversight. Applicant has met all the statutory requirements for governance and management, and there is no good cause to deny this application.^{xvi}.

9. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for ESP.

Sponsor did not have clear and convincing evidence to find Applicant did not meet the standard with respect to ESP. As a high-performing replication, allegations regarding ESP are not statutory cause for denial. Applicant desired to replicate the

Somerset model, and chose the ESP based on the success of the ESP in the area of charter school replication as well as the competitive price offered by the ESP. Applicant describes the highlights of the ESP's accolades which attracted Applicant to the ESP and states that the ESP was selected for the following reasons, including but not limited to: the ESP's history of working with successful charter schools; the ESP currently works with over 90 charter schools, including Somerset, and Somerset is a high-performing school; the success of the ESP in growing high-performing networks of charter schools; all of the schools served by the ESP are either fully SACS-CASI accredited, or are in the process of obtaining such accreditation; the success of having two (including the first ever) district accredited system from SACS CASI/AdvancED; the proven track record of the ESP's client schools in being successfully renewed, and the overall ability of the ESP to provide the school's governing board with services and support necessary to fulfill the Board's mission. This is not an exhaustive list of reasons which led the board to the decision to work with the ESP, however, it does represent the objective reasons why the Board made their decision. Sponsor may not agree with Applicant's choice, however, a difference in opinion is hardly good cause to deny a charter application. Denial of a charter school based on conjecture or opinion does not constitute good cause.^{xvii} Furthermore, any given Applicant may decide whether they desire to contract with an ESP. Somerset Academy, Inc.'s, administrative review of competing ESP's led to the determination by the Board that the ESP selected for the proposed school was the right choice for the replication of the Somerset model and for the further expansion of Somerset. The ESP selected offered the highest level of service, the most competitive price, and the ability for the school to replicate their own model, thus retaining their Somerset identity. It is Applicant's belief these reasons are compelling. Sponsor alleges the Board does not have an arms-length business relationship with the ESP and has delegated too much of the day-to-day operations to the ESP. Applicant disagrees. The Governing Board will ensure that an "arm's length" performance-based relationship exists between the Board and the ESP, (App, 154, 167). Sponsor alleges the ESP and Somerset are "essentially one and the same", because the CFO of the ESP assists with the preparation of the annual tax returns for Somerset. The most recent 990 for the year ending 2014, identifies Andreina Figueroa, the then-current president of Somerset Academy Inc., as the principal officer, (See Ex. 6). Ana Martinez signs only in the capacity of "authorized representative," and the declaration above the signature block is a statement by the paid-preparer, HLB Gravier. Somerset and the ESP are two distinct legal entities (See Ex. 7). The ESP is hired by the Board to perform specific duties at the direction of the Board and only to the extent instructed by the Board, as described in the proposed ESP agreement, (App, 267-279). Applicant states that the Board evaluates ESP performance annually, (App, 167). Any failure on the ESP's part to perform its obligations under the agreement is grounds for termination by the Board on behalf of the School, (App, 167). This demonstrates a performance-based relationship as the Board will assess the ESP's continuing ability to provide

educational services and support. The Board operates independently of the ESP, and the board makes all decisions concerning school operations. The Principal, is responsible for day-to-day administration of the school pursuant to board policy, and in compliance with district, state, and federal guidelines for the school's operation, (App, 154). The ESP neither acts without specific direction of the Board, nor manages day-to-day operations. The ESP provides "back office" support for the Board through a team of individuals with expertise in the areas of business, law, quality assurance, strategic planning and development, and governmental compliance.

10. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Facilities.

As a high-performing replication, the allegations regarding Facilities are not statutory cause for denial of a high-performing application. Applicant describes its facility and its backup facility. (See App at 178-180; See Also Ex.3, pg.48-49.) It is clear that there is no requirement, in the application or the law, that the facility be identified or described at the time of application. Pursuant to Section 1002.33(5)(b)1.c., F.S., "The sponsor may approve a charter for a charter school before Applicant has identified space and Pursuant to 1002.33(7)(a)13. F.S., "the Charter contract (not the Application) shall identify the facilities to be used and their location." Sponsor takes issue in the evaluation instrument that a timeline was not provided for a decision to implement the backup plan. State law is clear: "The sponsor may not require a charter school to have a certificate of occupancy or a temporary certificate of occupancy for such a facility earlier than 15 calendar days before the first day of school," (F.S. 1002.33(7)(a)13). Therefore, the "timeline" for the new building is the statutory 15 calendar days before the first day of school. The "timeline" for the backup plan, consisting of modular facilities at Somerset's high school with which the proposed school will co-locate, is 15 calendar days before the first day of school. As Applicant explained in the Interview, the high school is located on the campus of Indian River State College who controls its own permitting process. Accordingly, Somerset does not have to apply to anyone other than its current Landlord, in order to effectuate any necessary backup plan which may be required.

11. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Transportation.

Sponsor did not have clear and convincing evidence to find Applicant did not meet the standard with respect to Transportation. As a high-performing replication, the allegations regarding Transportation are not a statutory cause for denial of a high-performing application. Consistent with Section 1002.33(20)(c), F.S. Transportation shall be provided by Applicant consistent with requirements of subpart I.E. of chapter 1006 and s. 1012.45. Applicant may provide transportation through an agreement or contract with Sponsor, a private provider, or parents. Applicant and Sponsor shall cooperate in making arrangements that ensure transportation is not a barrier to equal access for all students residing within a reasonable distance of the charter school as determined in its charter. Somerset intends to provide transportation pursuant to law and Sponsor has no

genuine reason to question Somerset's commitment to meet this commitment. Somerset will provide transportation necessary to ensure that it is not a barrier to access and as stated in the application, will assess needs annually during application and enrollment of students through the use of enrollment surveys, registration packets, and parent transportation agreements, all in accordance with applicable law, (App, 181). Transportation (App, 116), and the procedures the proposed school intends to implement to assess transportation needs are included, (App, 181-182) and a transportation vendor is identified (A&S Transportation) in the event transportation is deemed necessary to meet the needs of the projected student body.

Applicant states: "if the parent advises the School that there is a hardship, and he/she is unable to provide the transportation, the School will provide transportation within a defined reasonable distance (App, 114). Sponsor argues that parents should not have to prove that transportation is a hardship and operates as a barrier to equal access. Sponsor goes on that the school should provide transportation to all parents without question which reside within a reasonable distance. In response, Applicant is not suggesting that parents go to extensive lengths to "prove" a hardship; rather Applicant is requesting only that parents inform the school that transportation is needed and arrangements will then be made. In the same way that students must meet eligibility requirements for free and reduced lunch, so too must students meet eligibility requirements for transportation. The law does not require Applicant to provide transportation to all students residing within a reasonable distance, nor does the law give Sponsor authority to determine what "reasonable distance" means. The reasonable distance provision allows charter schools to establish a transportation zone that sets an outer boundary or radius beyond which a charter school is not required to provide regular transportation. Somerset currently operates a school in this District which offers transportation. Applicant states the proposed school will offer transportation in the same manner as the current Somerset school. (App, 181).

Employment, Enrollment and Budget: The Model Evaluation Instrument does not indicate whether an Applicant "Partially Failed to meet" any given standard. Rather, the Model Evaluation Instrument indicates whether an Applicant's Response "Meets the Standard", "Partially Meets the Standard", or "Does Not Meet the Standard". A response which Partially Meets the Standard is a response which addresses most of the criteria, but requires additional information. Sponsor has not articulated a basis for denial on the basis of employment, enrollment or budget as further discussed below. Alleged "Partial failure" to meet requirements where the response has been rated to "partially meets the standard" is insufficient to meet clear and convincing standard of material noncompliance Sponsor is required to prove and the App cannot be denied as to the below allegations.

12. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Employment.

As a high-performing replication, allegations regarding Employment are not statutory cause for denial of a high-performing application. Sponsor lacks actual evidence to support its assertion that Applicant partially failed to meet these standards, and in

fact, Sponsor further acknowledges that Applicant adequately addresses most of the criteria in this section, yet again, due to a cursory and biased review, not a single strength is listed in the Evaluation Instrument, (Ex.2A, pg.7). Sponsor's Overview includes only a generic statement which alleges Applicant does not provide detail for how teachers will receive specific training to ensure implementation of teaching strategies. However, an extremely detailed and comprehensive Staff Development Plan is included, (App, 160-164) which includes specific professional development workshops, school-site and district based trainings, professional development trainings, state and national conferences, and includes other programs made available for professional development opportunities. As this section was found to partially meet the standard, Sponsor failed to prove with clear and convincing evidence that Applicant did not materially comply with the application standards for employment.

13. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Student Recruitment and Enrollment.

As a high-performing replication, allegations regarding Student Recruitment and Enrollment are not statutory cause for denial of a high-performing application. Therefore, the application may not be denied as to allegations regarding enrollment. Sponsor lacks actual evidence to support its assertion that Applicant partially failed to meet these standards. As stated previously, Sponsor failed to give a meaningful review to the App, and for this category, failed to include either any strengths or concerns to which Applicant can respond. The Overview includes only a generic statement that the admissions process may not be in accordance with law because of a lack of specificity as to how applications from students with disabilities will be handled and does not reference sections of law or the App. However, the application process does not take into account a potential student's disability status, and does not request a student's disability status as part of the application process, thereby allowing every student who applies an equal opportunity to enroll in the school, (App, 112). Sponsor has not articulated a basis for denial on these grounds. As this section was found to partially meet the standard, Sponsor failed to prove with clear and convincing evidence that Applicant did not materially comply with the application standards for enrollment.

14. Sponsor failed to show clear and convincing evidence Applicant did not materially comply with application standards for Budget.

A high-performing charter school is required to submit an annual financial plan for each year requested by the charter for operation of the school for up to 5 years, and provide anticipated fund balances based on revenue projections and a spending plan based on projected revenues and expenses. Applicant sets forth such data in the Exhibits to the App, where each year is shown in the budgets, budget narratives, and budget detail, and contains additional detail on anticipated fund balances and projected revenues and expenses, (App, 308-332). A description of controls that will safeguard finances and projected enrollment trends, also required by statute, is provided (App, 192-194.). These include procedures in which "The Governing Board shall annually adopt and maintain an operating budget, retain the services of a certified public accountant or

auditor for the annual independent financial audit and review, and will approve the audit report, including audit findings and recommendations,” (App, 144, 154). Applicant has submitted a budget which fully complies with the statute, and there is no good cause to deny this application.^{xviii} Somerset Academy is a highly experienced Applicant with an impressive record of success in not only its number of approved applications with similar budgets and financial plans, but continuing success in its existing schools. The budget forecast was developed using statistical data collected from a decade worth of operations in Somerset’s successfully operating schools, and specifically those in alignment with the proposed school’s 6-8 program. The methodology used to prepare the budget forecast is reliable. Every one of the charter schools that developed budgets using this system yielded a budget surplus this past year. The proposed school will implement the same best practices and quality standards that have proven effective throughout the Somerset system, including Chapel Trail. Sponsor alleges the proposed budget does not include funds to pay for the staffing and operational plan outlined in the application and that many of the educational and operational services proposed cannot be provided. However, the positions budgeted for in the Staffing Plan are found in the instructional and operational section of the budget on pages 310 and 316. These positions are sufficient to provide educational and operational services proposed for the projected population. The budget detail states multiple times “Salaries in the staffing plan are for Full Time Equivalent (FTE) instruction positions. Individuals may be utilized for other functions.” As discussed above, it is common practice for staff in a start-up school to “wear multiple hats” and hold dual roles in administrative and operational duties until FTE is sufficient to support additional staff. The budget and staffing plan is sufficient and meets the needs of school operations. The budget was created to cover basic operating costs for the school and to show viability at the most conservative budget level, without assuming grants or loans. As a replication of a High-performing school, applicant expects to apply and receive a start-up grant. As contingency, Somerset received a letter of Commitment from BuildingHope, a non-profit lender, to assure the proposed school would have sufficient funding in the event a grant is not awarded. The Lender Commitment Letter, including a range of loans and terms, is included in the App under Appendix H. Somerset has the funding and willingness to support the proposed school financially, which may include reduction, deferral, or waiver of part or all of the network fee, as needed, (Ex.3, pg.51-54). Sponsor rated this Section “partially meets the standard,” and failed to prove with clear and convincing evidence that Applicant did not materially comply with application standards.

15. Sponsor failed to show by clear and convincing evidence that Applicant did not materially comply with application standards for Financial Management and Oversight.

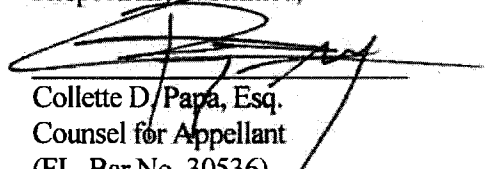
Sponsor alleges Applicant does not provide a description of how finances will be handled or any assurances the Governing Board will control school finances. The App details financial policies and procedures at pages 192-196. The Governing Board will annually adopt and maintain an operating budget, quarterly or monthly financial statements as required

which include a balance sheet and statement of revenue, expenditures and changes in fund balance; retain services of a certified public accountant/auditor for independent financial audit, and will review and approve the audit report, including audit findings and recommendations; report to all applicable legal agencies including Sponsor, and oversee the principal in any delegated financial matters, (App, 192, 194). In addition, internal accounting procedures to ensure financial controls are detailed at pages 193-194, and are in accordance with federal, state, and local laws and in-line with industry standards and best practices. Procedures are in place for General accounting, Internal accounting procedures, receivables, bank statements, wire transfers, Internal Revenue Collection, Capital Expenditures, Operational Checking Accounts, Authorized Check Signors. While the ESP coordinates these services and policies at the request of the Governing Board, the Governing Board retains all authority over all decisions. The ESP Agreement, attached hereto as part of the App, states that the Board must have "complete autonomy and control" and Service Provider must obtain "review and approval" of the Board. While the ESP may be assisting with checks, paying bills and serving as a liaison between the board and the accounting firm, all this is done in accordance with board policy and procedure, and with the review and approval of the board. Any action done by the ESP on behalf of the Board is subject to the ultimate control of the board. These services are included as part of the ESP fee as the ESP has an internal accounting department to service the ESP's client schools. (App, 267-279). The annual audit is paid for by the school to the auditor separately as this is an independent audit. Sponsor failed to demonstrate by clear and convincing evidence that Applicant would not exercise proper financial management and oversight of the School and comply with the Florida Statutes.

CONCLUSION: For the numerous reasons outlined above, Sponsor has not provided clear and convincing evidence to support denial, nor that Applicant did not materially comply with any application standard applicable to a High-Performing charter school replication. As stated at the School Board Meeting by a former State Representative, the Legislature passed this law because, " not all charters are the same, and if you have a high-performing charter school...we want to replicate those throughout the State...We wanted to create a format to make it easier, not harder to be approved," (Ex.4, pg.14). Nothing about this review suggests the process was easier for this high-performing school. The School Board members state they will follow the law and they will follow what the Department of Education says, whether they agree with it or not, (Ex.4, pg.67). Sponsor's failure to do so here requires approval of the application. Accordingly, this appeal should be granted, and Sponsor's denial should be overturned by the State Board of Education and remanded with instructions that Sponsor approve the application.

Dated this 27th day of October, 2015

Respectfully submitted,



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Certificate of Service

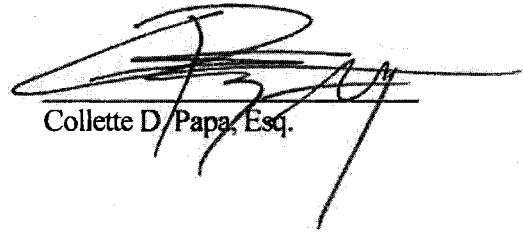
I hereby certify that a true and correct copy of the foregoing instrument has been furnished this 27th day of October, 2015 by overnight delivery to:

E. Wayne Gent
St. Lucie Public Schools
Superintendent
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Ft. Pierce, FL 34947

Kathleen McGinn
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Collette D/Papa, Esq.

ARGUMENT WORKS CITED:

ⁱ “...If an application is denied, the Sponsor shall, within 10 calendar days after such denial, articulate in writing the specific reasons based upon good cause supporting its denial of the charter application.”

ⁱⁱ *Keys Citizens For Responsible Government, Inc. v. Florida Keys Aqueduct Authority*, 795 So.2d 940, 948 holding that the opportunity to be heard must be at a meaningful time and in a meaningful manner; See Also *Matthews v. Eldridge*, 424 U.S. 319, 333 (1976) accord *Fuentes v. Shevin*, 407 U.S. 67, 80 stating that procedural due process under the 14th amendment of the U.S. Constitution guarantees notice and an opportunity to be heard at a meaningful time and in a meaningful manner.)

ⁱⁱⁱ *Id.*

^{iv} See generally, *Ryan's Furniture Exchange, Inc. v. McNair*, 1935, 120 Fla. 109

^v See *School Bd of Seminole County v. Renaissance Charter School, Inc.*, 113 So.3d 72 (Fla. 5th DCA 2013)

^{vi} (10) ELIGIBLE STUDENTS.—

(a) A charter school shall be open to any student covered in an interdistrict agreement or residing in the school district in which the charter school is located; however, in the case of a charter lab school, the charter lab school shall be open to any student eligible to attend the lab school as provided in s. 1002.32 or who resides in the school district in which the charter lab school is located. Any eligible student shall be allowed interdistrict transfer to attend a charter school when based on good cause. Good cause shall include, but is not limited to, geographic proximity to a charter school in a neighboring school district.

(b) The charter school shall enroll an eligible student who submits a timely application, unless the number of applications exceeds the capacity of a program, class, grade level, or building. In such case, all applicants shall have an equal chance of being admitted through a random selection process.

(d) A charter school may give enrollment preference to the following student populations:

1. Students who are siblings of a student enrolled in the charter school.
2. Students who are the children of a member of the governing board of the charter school.
3. Students who are the children of an employee of the charter school.
4. Students who are the children of:
 - a. An employee of the business partner of a charter school-in-the-workplace established under paragraph (15)(b) or a resident of the municipality in which such charter school is located; or
 - b. A resident of a municipality that operates a charter school-in-a-municipality pursuant to paragraph (15)(c).
5. Students who have successfully completed a voluntary prekindergarten education program under ss. 1002.51-1002.79 provided by the charter school or the charter school's governing board during the previous year.
6. Students who are the children of an active duty member of any branch of the United States Armed Forces.

(e) A charter school may limit the enrollment process only to target the following student populations:

1. Students within specific age groups or grade levels.
2. Students considered at risk of dropping out of school or academic failure. Such students shall include exceptional education students.
3. Students enrolling in a charter school-in-the-workplace or charter school-in-a-municipality established pursuant to subsection (15).
4. Students residing within a reasonable distance of the charter school, as described in paragraph (20)(c). Such students shall be subject to a random lottery and to the racial/ethnic balance provisions described in subparagraph (7)(a)8. or any federal provisions that require a school to achieve a racial/ethnic balance reflective of the community it serves or within the racial/ethnic range of other public schools in the same school district.
5. Students who meet reasonable academic, artistic, or other eligibility standards established by the charter school and included in the charter school application and charter or, in the case of existing charter schools, standards that are consistent with the school's mission and purpose. Such standards shall be in accordance with current state law and practice in public schools and may not discriminate against otherwise qualified individuals.
6. Students articulating from one charter school to another pursuant to an articulation agreement between the charter schools that has been approved by the sponsor.

^{vii} See Florida Statute §1002.395(1)(a)(2-4)

^{viii} See Florida Statute § 1002.33(2)(c)(2)

^{ix} See *School Board of Osceola County v. UCP of Central Florida*, 905 So. 2d 909.

* As a high-performing charter school substantial replication, the burden of proof lies with the Sponsor. Pursuant to F.S. 1002.33 (6)(b)3.b.:

"An application submitted by a high-performing charter school identified pursuant to s. 1002.331 may be denied by the sponsor only if the sponsor demonstrates by clear and convincing evidence that:

- (I) The application does not materially comply with the requirements in paragraph (a);
- (II) The charter school proposed in the application does not materially comply with the requirements in paragraphs (9)(a)-(f);
- (III) The proposed charter school's educational program does not substantially replicate that of the applicant or one of the applicant's high-performing charter schools;
- (IV) The applicant has made a material misrepresentation or false statement or concealed an essential or material fact during the application process; or
- (V) The proposed charter school's educational program and financial management practices do not materially comply with the requirements of this section." (emphasis supplied)

^{xi} Somerset College Preparatory Academy of the Treasure Coast, Somerset's High School in St. Lucie County, has a 2.0 GPA admission criteria. This was approved by this Board.

^{xii} F.S. 1002.33 (10) (e) charter schools are permitted to limit enrollment to target students meeting reasonable academic eligibility standards.

^{xiii} There is no good cause to deny a charter school application where the application has met all the statutory elements. See *School Board of Osceola County v. UCP of Central Florida*, 905 So.2d 909; See Also *School Board of Volusia County v. Academies of Excellence, Inc.*, 974 So.2d 1186, 1191.

^{xiv} See F.S. 1002.33(6)(a)1. Demonstrates how the school will **use** the guiding principles and meet the statutorily defined purpose of a charter school. See also F.S. 1002.33(2)(a): Charter schools in Florida shall be **guided** by the following principles...

^{xv} See *School Board of Osceola County v. UCP of Central Florida*, 905 So. 2d 909.

^{xvi} See *School Board of Osceola County v. UCP of Central Florida*, 905 So.2d 909 (holding no good cause for school board to deny application for establishment of charter school where application met all statutory requirements.) See Also *School Board of Volusia County v. Academies of Excellence, Inc.*, 974 So.2d 1186, 1191

^{xvii} See *School Board of Osceola County v. UCP of Central Florida*, 905 So. 2d 909.

^{xviii} See *School Board of Osceola County v. UCP of Central Florida*, 905 So.2d 909; See Also *School Board of Volusia County v. Academies of Excellence, Inc.*, 974 So.2d 1186, 1191.

INTRODUCTION WORKS CITED:

¹ Pursuant to F.S. 1002.33 (6)(b)3.b.:

"An application submitted by a high-performing charter school identified pursuant to s. 1002.331 may be denied by the sponsor only if the sponsor demonstrates by clear and convincing evidence that:

- (I) The application does not materially comply with the requirements in paragraph (a);
- (II) The charter school proposed in the application does not materially comply with the requirements in paragraphs (9)(a)-(f);
- (III) The proposed charter school's educational program does not substantially replicate that of the applicant or one of the applicant's high-performing charter schools;
- (IV) The applicant has made a material misrepresentation or false statement or concealed an essential or material fact during the application process; or
- (V) The proposed charter school's educational program and financial management practices do not materially comply with the requirements of this section." (emphasis supplied)

Material non-compliance is defined as failure to follow requirements or violation of prohibitions applicable to charter school applications. The failure must be quantitatively or qualitatively significant either individually or when aggregated with other noncompliance. This is a much higher standard than competent substantial evidence used to review applications.

² See §§ 1002.33(2)(a) & (b), F.S.; School Board of Volusia County, 974 So.2d 1186, 1190-1191 (Fla. 5th DCA 2008); School Bd of Osceola County v. UCP of Central Florida, 905 So.2d 909, 914-916 (Fla. 5th DCA 2005).

Before the Florida State Board of Education

In re: Denial of Somerset College Prep Academy Middle School
High Performing Replication Application 2015

Notice of Appeal

Somerset Academy, Inc.,
APPLICANT/APPELLANT

v.

St. Lucie Public School Board,
APPELLEE

Appendix to Notice of Appeal

Exhibit 1.	Charter School Application
Exhibit 2.	Notice of Denial
2.A.	Memorandum to School Board
2.B.	Application Evaluation Instrument
Exhibit 3.	Somerset Governing Board Interview Transcripts: August 27, 2015
Exhibit 4.	St. Lucie County School Board Meeting Transcripts: September 22, 2015
Exhibit 5.	Somerset Governing Board Meeting Schedule
Exhibit 6.	Somerset Academy Inc. 2013-2014 Form 990 (redacted)
Exhibit 7.	Corporate Documents
Exhibit 8.	Cited Caselaw
Exhibit 9.	High Performing Letter

Exhibit 1.	Charter School Application
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1

MODEL FLORIDA CHARTER SCHOOL APPLICATION

High Performing Replications

Submitted Pursuant to Section 1002.331, Florida Statutes

APPLICATION COVER SHEET

NAME OF PROPOSED CHARTER SCHOOL: Somerset College Prep Academy Middle School

Name of HP school submitting Application*: Somerset Academy Middle School, Chapel Trails MSID#: 06-5151

NAME OF NONPROFIT ORGANIZATION/MUNICIPALITY UNDER WHICH CHARTER WILL BE ORGANIZED OR OPERATED:
Somerset Academy, Inc

Provide the name of the person who will serve as the **primary contact** for this Application. The **primary contact** should serve as the contact for follow-up, interviews, and all notices regarding this Application.

NAME OF CONTACT PERSON: Erika Rains
TITLE/RELATIONSHIP TO NONPROFIT: Principal of SCPA (FKA CPATC) _____

MAILING ADDRESS: 501 NW University Blvd, PSL, FL 34986

PRIMARY TELEPHONE: (772) 343-7028 _____ **ALTERNATE TELEPHONE:** (561) 951-5967 _____

E-MAIL ADDRESS: rains.erika@cpatc.org

NAME OF EDUCATION SERVICE PROVIDER (if any): Academica

NAME OF PARTNER/PARENT ORGANIZATION (if any): Somerset Academy, Inc

Projected School Opening Date: August 2016

School Year	Grade Levels	Total Projected Student Enrollment	Student Enrollment Capacity (if known)
First Year	6-8	200-250	
Second Year	6-8	250-375	
Third Year	6-8	300-375	
Fourth Year	6-8	350-375	
Fifth Year	6-8	375	

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate, realizing that any misrepresentation could result in disqualification from the application process or revocation after award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the applicant.

* High Performing letter from Commissioner of Education must be included.

Signature
 David Concepcion
 Printed Name

Governing Board Chair
Title
 11/30/11

 Date

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I. REPLICATION

- A. Provide a list of every High-Performing Charter School that is operated by the governing board submitting this application, including grade-levels served by each school.

SOMERSET ACADEMY, INC. HIGH PERFORMING SCHOOLS					
MSID	DISTRICT NAME	SCHOOL NAME	GRADE LEVELS	2014 GRADE	DATE EFFECTIVE
130332	DADE	SOMERSET ACADEMY (SILVER PALMS)	K-8	A	7/29/11
134012	DADE	SOMERSET ACADEMY AT SILVER PALMS	K-5	B	10/6/14
130520	DADE	SOMERSET ACADEMY CHARTER	K-5	A	7/29/11
137042	DADE	SOMERSET ACADEMY CHARTER HIGH SCHOOL	9-12	A	7/29/11
136004	DADE	SOMERSET ACADEMY CHARTER MIDDLE SCHOOL	6-8	A	7/29/11
136013	DADE	SOMERSET ACADEMY CHARTER MIDDLE SCHOOL (SOUTH HOMESTEAD)	6-8	A	10/8/12
136053	DADE	SOMERSET ACADEMY CHARTER MIDDLE SCHOOL SOUTH MIAMI CAMPUS	6-8	A	9/5/13
132007	DADE	SOMERSET ACADEMY ELEMENTARY SCHOOL SOUTH MIAMI CAMPUS	K-5	A	9/5/13
065141	BROWARD	SOMERSET ACADEMY	K-5	A	7/29/11
065221	BROWARD	SOMERSET ACADEMY CHARTER HIGH	9-12	A	7/29/11
065211	BROWARD	SOMERSET ACADEMY DAVIE CHARTER	K-5	A	7/29/11
065391	BROWARD	SOMERSET ACADEMY EAST PREPARATORY	K-6	A	9/5/13
065405	BROWARD	SOMERSET ACADEMY ELEMENTARY (MIRAMAR CAMPUS)	K-5	A	7/29/11
065406	BROWARD	SOMERSET ACADEMY MIDDLE (MIRAMAR CAMPUS)	6-8	A	7/29/11
065151	BROWARD	SOMERSET ACADEMY MIDDLE SCHOOL	6-8	A	7/29/11
065021	BROWARD	SOMERSET NEIGHBORHOOD SCHOOL	K-5	B	10/6/14

- B. Describe how the educational program proposed by the applicant is a substantial replication of the applicant school or one of the applicant's high-performing charter schools.

The educational program proposed by Somerset College Preparatory Academy Middle School is a substantial replication of and mirrored after Somerset Chapel Trail Middle Charter School #5151, a high performing charter school, as designated by FLDOW (See Appendix I), located in Pembroke

Pines, FL, and can be considered as such because it will be using the **same education program, outreach and guidelines to manage and run the school.**

Strategies for replication of the existing design are fully detailed in the sections referenced below. These include, but are not limited to, the following:

- Implementing the **same core values and beliefs of the existing programs** (*Section 3*)
- Adopting the **research-based educational concept for the existing programs** (*Section 6*)
- Utilizing the team of experts (who have ownership of the Somerset educational program) as consultants who **continuously provide training to the proposed school's administrators, faculty and staff** (*Sections 9 and 11*)
- Adopting **common expectations of student behavior and parental involvement**, as is evident in #5151 and ALL Somerset schools (*Section 8 and 13*)
- Adopting **common** Professional Policies and Standards for staff, as is evident in #5151 and ALL Somerset schools (*Section 10 and 12*)
- Implementing the **policies for financial management and oversight proven effective in the existing school**, as is evident in #5151 and ALL Somerset schools (*Section 18*)
- Providing ongoing communication, training, and support for the school's changing operational needs (*Section 9 and 12*)

In general, **all Somerset schools share a common philosophy of student expectations, a unique code of excellence, an expectation of parental commitment, and collaborative management infrastructure derived from the inception of its first school, Somerset Neighborhood.** The "best practices" that have been established at Somerset Academy are derived from over **sixteen years of experience** on innovative board members, parents and educators.

Varying from 150 students to 2,200, all Somerset programs have implemented the "neighborhood" school paradigm into its management procedures to consistently maintain a small school environment where students can excel and parents are included in the process. From facilities design to academic program approach, every Somerset school is unique in that it is intended to serve the immediate needs of its local community. Although the school will be a direct replication of Somerset Chapel Trail (#5151), the School will take into consideration best practices for the demographic it will serve.

- C. *Describe how the organization or individuals involved in the operation of the proposed school are significantly involved in the operation of the replicated school.*

The organizations (Somerset, Inc, the Somerset Board, Academica, business partners, etc) and the individuals (members that make up the aforementioned organizations) are involved in the #5151, as well as all other Somerset schools, will be involved in the operation of the proposed school.

The individuals who make up the governing board of the proposed school is comprised of the same individuals responsible for the operation and governance of the existing Somerset schools. These highly experienced professionals, possess the expertise in the areas of curriculum, assessment, finance, law, school management and governance to be able to replicate the existing design. Somerset Academy, Inc. has financial and human resources available to replicate a high quality model, the ownership of the existing school design, and most importantly, has a proven track record of success in replicating the design. The School will align its curriculum with Somerset Chapel Trail (#5151) to ensure a true replication. These factors all support the organization's capacity to replicate the existing school design. The governing board will use its expertise in managing high-performing schools. The School will fall under the Somerset Governing Board. The School will be serviced by the ESP, Academica. The School leader will have access to the school leader of Somerset Academy Chapel Trail middle School #5151.

Over the years the founding staff of Somerset Academy, Inc has transformed into an accomplished team wherein founding teachers have become Somerset principals and administrators in its successfully replicated schools. Cultivating this leadership atmosphere, Somerset Academy, Inc. has a retention rate of over 90 percent inclusive of founding board members, administrators, and teachers. Many of these individuals (e.g. principals, staff and teachers) will assist in the replication process for Somerset College Preparatory Academy Middle School and serve a role in executing the same strategies to create another high-performing Somerset school.

It is the commitment of each (meaning ALL, meaning they replicate each other) Somerset Charter school to uphold high expectations for all, to create safe and caring learning environments, and to maintain a culture where parents, teachers, students, governing board and community stakeholders work as a cohesive team amongst ALL Somerset schools. It is this common commitment aligned with the vision to set high standards in developing life-long learners that has yielded Somerset's replication success. The driving force behind this success is the motivation and dedication of each stakeholder to not just maintain that vision, but to continuously strive to reach beyond it from year to year. The result has been a school system that is characterized by successful students, innovative educators, exceptional administrators, committed board members and engaged parents.

The School will be a replication of the high performing Somerset Chapel Trail Middle School (Broward #5151) educational program, and governed by the Somerset Academy Governing Board, and serviced by the service provider Academica. Somerset Academy, Inc educational programs are in existence in Dade, Broward, Palm Beach, Monroe, St. Lucie (College Prep Academy) and Duval counties, as well as Texas, D.C. and Nevada. Somerset Academy was founded in 1997, and has since established high-quality educational programs that have and continue to achieve academic success.

Founded in 1997, Somerset Academy was one of the first charter schools to open in Broward County, and has achieved among the State's highest Mathematics scores in the Stanford Achievement Test and in the FCAT. Somerset Academy was also one of the first charter schools in Florida to be accredited by the Southern Association of Colleges and Schools (SACS - CASI). Since then, every Somerset program has each sought and

obtained accreditation, informing stakeholders that every Somerset school is a quality school, committed to continuous improvement.

While Somerset is accredited as a district, and the commonalities among the Somerset schools include at minimum, best practice, the one central common thread is that each and every Somerset school is unique and different. Each school serves a different population and demographic, and has students with different needs. The Somerset schools meet each student's needs in the way that is best for that student. Therefore, there is no specific design replication to any of our schools. The fact that all of our principals collaborate, we all use best practice; and we all support each other is the design that is replicated throughout our Somerset system, from South Florida, all the way up to DC, down to Texas and over to California and Vegas. This video may make this more clear:
<https://www.youtube.com/watch?v=mCGTy9Ytj-M>

In further pursuit of academic accountability and excellence, the organization obtained District accreditation for the Somerset schools. In April of 2009, Somerset Academy was awarded SACS/CASI District Accreditation for its proven commitment to quality and continuous improvement and educational excellence. **It was the first charter school system in the nation to pursue and achieve "district" accreditation.** Throughout the process, The Quality Assurance Review Team representing the SACS CASI examined the effectiveness of the system's methods for quality assurance. An excerpt from the report findings validates a direct relationship between the program elements and student achievement:

"Somerset Academy, Inc. has a laser-like focus and drive towards excellence and long-range success...[the organization] encourages stakeholder involvement, uses data analysis to improve classroom instruction and student learning, and provides leadership at the district and school level to encourage innovation in all areas. The system also aligns curriculum with the Florida Sunshine State Standards. The board delegates administrative functions to the principals and collectively they have studied and revised the vision and purpose of the school system..." (Dr. Olivine Roberts, Chair, Quality Assurance Review Team - SACS CASI - Report of the Quality Assurance Review Team for Somerset Academy, Inc. April 26-29, 2009).

Based on the organization's accreditation, the proposed school under the operation of Somerset Academy Inc. will open as SACS CASI accredited school from inception and will be held to the **same standards of accountability of the existing programs. Thus, by replicating the successful educational design of the existing schools – with a full-range of services targeted to students of all performance levels -- the School will prove highly effective in raising student achievement.**

Somerset's continuous compliance with legal, organizational, and financial requirements coupled with increasing academic performance annually for all schools, has yielded approved and/or renewed charter school contracts over the past ten years. Today, there are over 40 Somerset Academy programs in Dade, Broward, Palm Beach and Duval counties offering complete Pre-K through high school systems across 17 campuses.

II. EDUCATIONAL PLAN

Section 1: Mission, Guiding Principles and Purpose

A. *Provide the mission statement for the proposed charter school.*

The mission statement should, in a few concise sentences, indicate what the school intends to do, for whom and to what degree. A school's mission statement provides the foundation for the entire application.

Somerset Academy Inc. promotes a culture that maximizes student achievement and fosters the development of responsible, self-directed life-long learners in a safe and enriching environment.

The mission of Somerset College Prep Academy Middle School is to promote a culture that maximizes scholar achievement and fosters the development of responsible, self-directed life-long learners in a safe and enriching environment, while providing the aspiring young minds with the opportunity and skills to become successful learners at the high school level.

Vision:

Somerset Academy, Inc. is dedicated to providing equitable high quality education for all students.

Purpose:

Somerset Academy, Inc. promotes a culture that maximizes student achievement and fosters the development of accountable, 21st century learners in a safe and enriching environment.

Core Principles:

- Student learning and achievement is paramount
- Effective school leaders
- Highly qualified staff
- Effective governing board
- Safe and secure learning environment
- Data assessments to drive curriculum and educational focus
- Research-based curriculum
- Continuous Improvement
- Teacher training and mentoring throughout the academic year
- Balanced budgets to ensure resources for student achievement and teacher efficiency
- Teamwork with stakeholders - community leaders, parents, students, teachers, administration and governing board
- Communications among all Somerset leaders

Our Beliefs:

S - Self-motivating learners

O - Obligation to all stakeholders

M - Maintaining a safe and nurturing environment

E - Effective Practices

R - Resources for 21st century learners

S - Students who achieve proficiency and exceed high expectations

E - Evaluate continuously and utilize data driven decisions

T - Teachers who support learning through research-based curriculum

B. Describe how the school will utilize the guiding principles found in section 1002.33(2)(a), F.S.

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

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

In accordance with the law, Somerset College Prep Academy Middle School (SCPAMS) shall meet high standards of student achievement, as it implements a rigorous curriculum designed to prepare students for the challenges of the secondary level of education, including offering advanced and honors classes in grades 6-8 and the official college Board's pre-AP curriculum (Springboard), in addition to an array of other curricula designed to meet student needs through a data driven differentiated instructional model, as does #5151. **In accordance with the law, SCPAMS will provide parents flexibility in choosing among diverse educational opportunities**, as it will be the only 6-8 charter option on a 9-12 campus in Port Saint Lucie, and a feeder for the only college preparatory charter high school option in the entire district. This is similar to #5151 in that it shares its campus with a 9-12, also. Through an assertive, non-discriminatory marketing plan, as detailed in this application, the School will make certain to inform parents in the community of the educational opportunities available for their children. Working alongside neighborhood partners and community members, the School will offer them additional **choices** within the state's public school system.

SCPAMS, hereinafter referred to as "the School", will impart a thorough academic curriculum in an environment that is both nurturing and creatively stimulating. The governing entity for the applicant, Somerset Academy, Inc., is an AdvancED/SACS -CASI accredited educational system, with a proven record of meeting high standards of student achievement and providing high-quality K-12 public charter school programs in Florida since 1997, Somerset Academy, Inc.

The high standards will be achieved, maintained and exceeded by students with the following:

- Provide a vigorous educational program (as does #5151) vital for every child's scholastic success
- Deliver a dynamic school curriculum, including emphasis given to student-centered instruction towards student mastery of the Florida Standards, as adopted (as does #5151),
- Compliment and enhance classroom studies through premium curricular and technology infused extra-curricular programs (as does #5151)
- Provide opportunities for involvement of students, families and develop deep roots with the community partners in the educational process through a school advisory committee (as does #5151).
- Employ mechanisms to continuously monitor, evaluate, and improve curriculum to achieve continuous student improvement year to year (as does #5151).
- Utilize strong technologically rich academic programs and tools to assist and increase a multi-sensory learning experience (as does #5151)

- *Promote enhanced academic success and financial efficiency by aligning responsibility and accountability.*

The School will promote enhanced academic success and financial efficiency by aligning responsibility and accountability. The School will promote financial efficiency and will be accountable to its students, their families, and other stakeholders, providing a quality education in a responsible, cost-efficient manner. In order to align the plan for academic success with financial efficiency, the School will gather pertinent data relative to its student body and subsequently set goals to target student performance and achievement. The school will allocate appropriate funds or include verbiage in teacher contracts to include tutoring and remediation as required duties, to facilitate the tutorial and remediation programs to meet the needs of all students. Academica staff/accounting and finance department, Somerset personnel and SCPAMS administration (principal, principal's designee, i.e. treasurer, etc) shall prepare and approve an annual budget in conjunction with the administrative leadership of SCPAMS for review by the Somerset Board of Directors, as is done in all Somerset schools and in #5151.

Monthly reports indicating financial accountability will be produced for district evaluation. The financial accounting department of Academica, retained by the Somerset Board shall meet periodically to provide essential projections regarding financial planning and stability for both the Somerset Board and SLCSD.

The principal of SCPAMS, and the principals of all Somerset schools, including #5151, and Academica accounting and finance department work closely throughout the year in order to collectively prepare budgets, monthly and quarterly financial statements, which are then submitted to the Somerset Board for review and approval at each Board Meeting. These same statements and reports are also submitted to the district. Financial responsibilities will be clearly delineated in job descriptions and all staff, faculty and administrators will be provided a list of their responsibilities, and be required to sign an acknowledgment form indicating their comprehension of said responsibilities.

The School is responsible for its students' success and thus, must determine and meet each child's individualized educational needs, as does #5151. To meet these needs, the School will continuously monitor student progress in order to ensure all students are receiving the services they require in order to progress, as detailed more specifically herein Section I part D of this application. When available, student assessment records from previous years will be used to gather baseline data on each student. The data may also include standardized test scores, report card grades, attendance records, and behavioral records, Individual Education Plans (IEP), and/or English Language Learner Plans, as applicable. This data will be made available to teachers who, as stakeholders, will share in the responsibility of providing appropriate services to promote student academic success.

Further, upon accessing data from the State's Annual Accountability Reports, the School will objectively measure its own progress in meeting the needs of its student population. As a means for aligning responsibility for students' academic success to financial efficiency, after an appropriate implementation timeframe, and prior to any contract renewals, the academic programs which are utilized at the School will be re-evaluated, and the School's administration will discuss with the Governing Board their findings as to whether or not there exists a positive yield of student achievement for the respective investment.

Thus, by designing and communicating specific educational goals and financial responsibilities to its stakeholders (governing board, staff, students, and parents) – the School will promote continuous academic success and financial efficiency by aligning responsibility with accountability.

- *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.*

The School will provide parents with sufficient information on their child's reading level and progress every year. This will be done via letter home, regularly scheduled parent/teacher conferences, web based interactive software (Skyward) designed to allow students and parents to track student progress and communicate with teachers/school. Parents will be provided with copies of "growth goal contracts" signed by students, based on scores from school and state mandated tests (SRI, diagnostic assessments, state standardized tests, End of Course Exams, etc.) This means of communication informs parents whether or not their child is reading at grade level and whether or not their child has gained a year's worth of learning for every year spent at the School. The School will also provide its parents with Adequate Yearly Progress (AYP) reports based on assessment results, communicating to the parent the child's reading learning gains for each year. Through detailed assessment of academic performance using standardized test scores and other assessments the School will:

- Identify students who are a level below, at grade level, or a level above grade level; and communicate this to parents (as does #5151, and per statute);
- Identify those students not making adequate progress toward the state standards, as adopted, and institute applicable measures for improvement (and communicate the baseline, the intervention strategies, and the progress of those interventions, in the manner identified herein this charter school petition) (as does #5151 and per statute); and
- Report student progress throughout the academic school year via a standards-based means of grade assignment for report cards (grades will be assigned in consideration of standards mastery) and biweekly progress reports (as does #5151).
- Somerset's Parent Academy (SPA)- informs parents of standardized tests requirements and objectives. SPA helps to take the fear out of test taking and is always well attended (as does #5151).
- ME Day- Teachers meet individually with students to discuss test scores and individual progress being made throughout the year. The student and teacher collectively create manageable goals for the student, as well as an execution plan, to help them excel (as does #5151).
- Somerset school website- the school's website will consistently be updated by administration and staff. Parents will also be empowered to receive daily text messages in regards to their child's daily homework assignments and progress in class (as does #5151).

Once academic performance data is disaggregated, the School will identify students not making adequate progress towards the standards, as adopted, and institute applicable measures for improvement (as does #5151). In addition, ongoing communication regarding the child's progress will occur between the School and the parents through mid-quarter progress reports and quarterly report cards. The School may also plan parent conferences, host parental involvement workshops (as does #5151), such as parent academies, and utilize other appropriate forms of written, oral and/or digital communication (as does #5151), as necessary. Other such methods of communication may include sharing/discussing student needs through the respective documentation and communication processes for development and update of Educational Plans (EPs), Individual Education Plans (IEPs), and English Language Learner Plans as applicable. The School will strive to maintain an open channel of communication with parents and other stakeholders at all times.

C. Describe how the school will meet the prescribed purposes for charter schools found in section 1002.33(2)(b), F.S.

In accordance with the law, charter schools shall fulfill the following purposes:

- *Improve student learning and academic achievement.*

The School, in accordance with the law, will improve student learning and academic achievement through a variety of means that include but are not limited to direct instruction in the classroom, differentiated instruction, pull outs as needed, home learning assignments, lunch tutoring, after school tutoring, Saturday Preps, online support systems, supplemental software, teacher access via school based text system, email, and message boards on the interactive teacher webpages, etc, as does #5151.

The school shall be designed to employ a high-expectations curriculum focused on student mastery of basics and beyond. Data from standardized tests such as, but not limited to SRI, EOC and state standardized tests, as adopted, shall be disaggregated by both teachers during planning meetings, and a data analysis management expert employed by Somerset, in order to determine the most efficient strategies for learning. SCPAMS will improve student learning and academic achievement through high expectations, rigorous engagement and hands-on learning activities. By setting the bar high (at or above proficiency), the expectation is students will rise to meet it, facilitated by their highly trained and competent teachers. Offering courses at honors level, through bridging curriculum such as Spring Board (which is also used at #5151), will ensure an increase of no less than one year gains in student learning as measured by state standardized tests and other assessments. The School will offer a well-rounded, dynamic educational program that will hold itself and its students accountable for meeting self-imposed goals and standards, as well as those required by the State of Florida and Saint Lucie County School District (SLCSD). The educational philosophy of the School is rooted in increasing learning opportunities and raising the academic achievement of all its students. To meet this goal, the school commits to:

- Deliver increased learning opportunities for its all students, by providing challenging curriculum within a nurturing, quality-learning environment;
- Design and implement a continuous improvement methodology wherein student assessment results offer opportunities for differentiated and targeted instruction tailored to students' individual needs, ensuring consistent increased student achievement outcomes;

- Expect and encourage that all students will realize their highest academic potential, especially in the core subjects of language arts, mathematics, science and social studies, and provide the means for these students to reach their potential;
- Match or surpass the average student academic performance of the local district in all required public accountability tests, (e.g. state standardized tests/EOC, etc.); and
- Seek out, establish, and maintain sound, mutually beneficial partnerships with local education and civic institutions to provide a wide array of educational experiences for students to enjoy continued learning opportunities beyond the immediate classroom.

The School's educational program will be aligned to specific innovative learning methods and strategies - with emphasis on low-performing students and reading - that have proven successful in raising student learning and achievement at #5151 and other Somerset schools. These include but are not limited to:

- A standards-based curriculum infusing a thematic approach to integrate core areas of study such as mathematics, reading, language arts, writing, science, and social studies.
- Appropriate assessments for learning (screening, progress monitoring, and diagnostic)
- Data-driven high quality differentiated instruction
- Supplemental programs for student advancement and remediation
- Support for teachers and ongoing professional development

The school will be part of the Somerset Academy, Inc. system, which has yielded over 40 high performing charter school programs in grades K-12 throughout the state of Florida and nationwide. Somerset Academy has developed a multi-tier system (management, assessment, instruction and professional development) that integrates technology within the core curriculum and achieves increased performance across all student populations and subgroups. Somerset Academy has been able to implement unique and innovative strategies aimed at student achievement and have proven these strategies to be successful with all student populations, including students with special needs (ESE) and English Language Learners (ELL). The results on standardized exams and learning gains, especially in mathematics, have proven its success. Furthermore, Somerset Academy, Inc. has the combination of experience and a demonstrated track record of success with its programs that will promote increased student achievement. The School intends to replicate these successes.

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

In accordance with the law, SCPAMS will increase learning opportunities for all students, with a special emphasis on low- performing students and reading through the use of approved academic programs that mirror Somerset Chapel Trail #5151 such as, but not limited to, the use of HMH Collections in the Intensive Reading classes to meet the needs of lower level students with the primary goal of bringing those students to or above grade level while preparing them for success in advanced placement courses; remediation through a double English/Reading and/or Critical Thinking course for Level 1 and 2 Readers; and ensuring all teachers are equipped with the necessary training required to fulfill such goals. The model for instructional delivery will be the

Rotational Instructional Model. The supplemental support software to be used in the classroom and at home will be Study Island, My Access and Scholastic Reading Counts. These software programs have been evaluated for success as measured by student gains, at the Somerset Chapel Trail Middle School (#5151). Instruction will be differentiated based on prior data, baseline entrance assessments, and ongoing assessments. Low performing students in areas other than English Language Arts and Math will also benefit from the Rotational Instructional Model, ensuring that their needs are being addressed in a learning style that is most appropriate for the individual student.

Reading proficiency is of the highest importance to the School, and thus, is the main focus of the curriculum. As such, implementation of the St. Lucie County Public Schools' K-12 Comprehensive Research-Based Reading Plan (CRRP) will be implemented at minimum. Teachers and staff will have training in and access to instructional materials to reinforce language arts skills. Some examples are: Structured Independent Reading, Reciprocal Teaching, Read and Retell, Learning to Write – Writing to Learn, Vocabulary Development, Accelerated Reader Program, CRISS (Creating Independence through Student-owned Strategies), Book Sharing, Cooperative Groups, Scholastic Reading Counts, Scholastic Reading Inventory, and the use of Graphic Organizers.

Further, the School's curriculum will serve students of all ability levels in accordance with the Florida Department of Education. Using data from the published assessment reports, standardized assessment results, and when applicable respective end of course exam results the School will measure its own progress in meeting the needs of its student population. The school will annually develop measurable learning objectives over the major subject areas, to target student learning and development needs in its annual School Improvement Plan (SIP). *State standards* that are not mastered will be identified, and appropriate measures for remediation will be implemented based on the needs of the individual student. Remedial students and students with special learning needs will have access to supervised study time and tutoring during lunch or after school (and possibly on Saturdays, as well) to accelerate their progress. In addition, students performing at grade level will be offered similar opportunities in order to maximize their potential and advance their progress.

- *Encourage the use of innovative learning methods.*

In accordance with the law, the School will encourage the use of innovative learning methods that will be incorporated in the curricular framework school-wide. The school accepts the curriculum of St. Lucie County Public Schools as its basic curriculum; however will not be restricted to the content of the curriculum, and whenever appropriate will introduce new elements to the courses offered.

In accordance with the law, the charter schools shall require the use of innovative learning/teaching methods through a mandatory CRISS (Creating Reading Independence Through Student Owned Strategies) training for teachers in Reading and English subject areas.

Teachers will be able to take advantage of in-service opportunities on a continuous basis throughout the year offered by textbook and curriculum companies, on-line, through webinars, and virtual trainings, as well as through training offered by St. Lucie District Schools that might be opened to charter employees, the DOE, and partnering universities. On site PDT (Professional Development Team) staff will train peers in the key curricular areas in order to facilitate ongoing professional development, as well as technical training and support. The school improvement team shall work with the School Advisory Council to examine and continually improve the quality of the academic programs. All English teachers will be trained in their curriculum. All teachers with para-

professionals or interns in the classroom will go to a training on how to properly utilize the paras or interns, and para-professionals will be trained on how to most significantly impact learning in a classroom. This training will be organized through a support network of schools and the Florida Consortium of Charter Schools. Further, all Somerset schools routinely provide trainings to teachers of sister schools, as need, and based on strengths.

The innovation of the School will not be in delivery of Florida standards, nor in mastery of these standards by the students; however, will be in the variety of instructional methods used by the teachers to deliver the coursework. Also, while setting high academic expectations for all students, the School will provide students the means to reach their academic goals, through differentiated instruction methodology, and hands-on inquiry-based investigations in their coursework.

Furthermore, the School is designed to offer a disciplined, balanced and enriched education of the highest quality, and to prepare them for a successful high school education, as does #5151.

- *Require the measurement of learning outcomes.*

In accordance with the law, the charter school shall require the measurement of learning outcomes by providing designated assessment days, where teachers will assess the learning of their students, as aligned with the Florida Standards, as adopted, and the instruction in their individual classrooms. Learning outcomes will be measured through portfolios, standardized tests, commercial research-based diagnostics, teacher or textbook publisher generated assessments and qualitative examinations of student performance, as well as Somerset-wide assessments. This will offer a rich picture of each student's ability to perform academically.

The School will participate in all applicable components of the Florida State Accountability System as required by Florida Statute, as well as many other age-appropriate research-based assessments. Using data from the published assessment reports to measure its own progress in meeting the needs of its student population, the School will:

- Identify students not making adequate progress towards mastery of the *standards* (with emphasis on low-performing students and students exhibiting reading deficiencies);
- Annually develop measurable learning objectives over the major subject areas to target student learning and development needs;
- Institute and monitor appropriate measures for students requiring remediation in reading and other prescribed subjects.

Learning outcomes will also be measured through the requirement of a Personal Learning Portfolio for students as part of their academic, career and social development. In addition, the school community will develop a SIP annually, as required, and report progress on its goals, learning outcomes of its students, and other pertinent school wide data through the state issued Annual Accountability Report.

Section 2: Target Population and Student Body

A. *Describe the anticipated target population to be served.*

If applicable, applicants should describe if they will target, in accordance with the law, certain populations defined in section 1002.33(10)(e), F.S.

In accordance with federal and state anti-discrimination laws, and with Florida Statute 228.2001, the Somerset Board will not discriminate on the basis of race, religion, national or ethnic origin, or exceptionality in the admission of students at all grade levels. The anticipated target population to be served is middle school students who intend to attend SCPAMS, and have the desire to attend college post high school, while still reflecting the racial and economic diversity of the geographic area, as dictated by the state. The School will have an anti-discriminatory open admission policy serving any student in grades 6 through 8 (approximately 12 to 14 years of age) who would qualify to attend a public school in the St. Lucie County Public School District. The school expects to have a racial/ethnic population as well as an English Language Learner (ELL) and Exceptional Student (ESE) population reflective of the surrounding public schools.

Admission Policy - In accordance with federal and state anti-discrimination laws and in accordance with the Florida Educational Equity Act, Section 1000.05(2)(a), the School will not discriminate on the basis of race, ethnicity, national origin, gender, disability, or marital status against a student in its school admission process. An open admission policy will be implemented wherein the School will be open to any student residing in the County. In accordance with the law, enrollment applications will be available to all students in St. Lucie County through recruitment and other information efforts. All applications will be date and time stamped upon receipt, addresses verified, GPA manually verified, as 6th grade applicants will not have a GPA established as of time of application, and then placed in a lottery pool and sorted to achieve the necessary demographic balance, as required by law. As the proposed middle school would feed the existing charter high school once an articulation agreement has been put in place, for which admission criteria includes a 2.0 minimum GPA, the same minimum is set forth in the middle school application to ensure a smooth transition and. With a highly rigorous college prep program, it is imperative that the potential students have a minimum aptitude and exhibit a desire to learn. GPA for incoming students would be hand calculated on a 4.0 scale, wherein an A would equal 4, B=3, C=2, D=1, and F=0. Section 1002.33(10)(e)5.,F.S., states that a "charter school may limit the enrollment process only to target the following student populations: ...students who meet reasonable academic, artistic, or other eligibility standards established by the charter school and included in the charter school application and charter or, in the case of existing charter schools, standards that are consistent with the school's mission and purpose." Statute permits the school to set a reasonable expectation, and a minimum 2.0 GPA has been deemed reasonable by the SLCSB, as is evident by the precedent set upon approval of the charter application for College Preparatory Academy of the Treasure Coast in 2011. Any eligible student, as described in Fla.Stat.§1002.33(10), who submits an application (prior to the posted deadline) shall be considered, unless the number of applications exceeds the capacity of the program, class, grade level, or building. In such case, all applicants shall have an equal chance of being admitted through a random selection process. If the number of applications falls short of the established capacity, supplemental registration periods may be held for the purpose of reaching student capacity. In

grades 6-8 the range of grade level population will probably be larger at the 6th grade as statistically determined by enrollment attrition.

Enrollment Preferences - In accordance with 1002.33(10)(d), F.S. the charter school may give enrollment preference to the following student populations:

1. Students who are siblings of a student enrolled in the charter school.
2. Students who are the children of a member of the governing board of the charter school.
3. Students who are the children of an employee of the charter school.
4. Students who are the children of: An employee of the business partner of a charter school-in-the workplace established under paragraph (15)(b) or a resident of the municipality in which such charter school is located; or A resident of a municipality that operates a charter school-in-a-municipality pursuant to paragraph (15)(c).
5. Students who are the children of an active duty member of any branch of the United States Armed Forces.

Enrollment Limitation - In accordance 1002.33(10)(e), F.S. the charter school may limit the enrollment process only to target the following student populations:

1. Students within specific age groups or grade levels.
2. Students considered at risk of dropping out of school or academic failure. Such students shall include exceptional education students.
3. Students enrolling in a charter school-in-the-workplace or charter school-in-a-municipality established pursuant to subsection (15).
4. Students residing within a reasonable distance of the charter school, as described in paragraph (20)(c). Such students shall be subject to a random lottery and to the racial/ethnic balance provisions described in subparagraph (7)(a)8 or any federal provisions that require a school to achieve a racial/ethnic balance reflective of the community it serves or within the racial/ethnic range of other public schools in the same school district.
5. **Students who meet reasonable academic, artistic, or other eligibility standards established by the charter school and included in the charter school application.**
6. **Students articulating from one charter school to another pursuant to an articulation agreement between the charter schools that has been approved by the sponsor.**
7. Students living in a development in which a business entity provides the school facility and related property having an appraised value of at least \$10 million to be used as a charter school for the development. Students living in the development shall be entitled to 50 percent of the student stations in the charter school. The students who are eligible for enrollment are subject to a random lottery, the racial/ethnic balance provisions, or any federal provisions.

In order to minimize any traffic impact caused by the school and ensure that the school is available to serve the residents of the neighborhood where the school is located, the Governing Board of the charter school may elect to limit the enrollment process to target students residing within a reasonable distance of the school as provided under Fla. Stat. §1002.33 (10)(e). The use of the

word *may* leaves this election optional. As the applicant is currently working with the City on a facility/proposed site plan, the applicant chose to leave this option open in order to minimize any traffic impact caused by the school, should the City of PSL request this. The applicant has no problem removing this option from the application, should the district require it.

For many students, large institutions can produce a sense of unguided anonymity, which frequently leads to disengagement and irresponsible behavior. A wealth of research indicates that small size is conducive to school safety and to high student achievement. Small, academically rigorous environments such as those proposed by SCPAMS have demonstrated an enhanced ability to build the capacities students will need to succeed in high school and college. SCPAMS's intimate nature will create an invaluable opportunity for these students and their families. At SCPAMS, every student will know that he or she is well known and cared for, and all students will be provided with the support necessary to help them become successful in high school, and further succeed in college. The only 6-12 school in SLC is LPA at an enrollment of over 1900 students, where approximately 787 are at the middle school level. Anything less than this would be deemed "smaller" by comparative definition, therefore, 1500 is small in relation to 1900. However, the middle school application is for approximately 375 students in grades 6-8. Dan McCarty MS has an enrollment of 1000. Forest Grove has an enrollment of 700. Southern Oaks has an enrollment of 969. Southport has an enrollment of 1074. Comparatively speaking, an enrollment of 375 up to 500 would be "small." The term *small* is subjective and up to interpretation.

- B. *Provide the following projection for each year of proposed operation: the grades that the school will serve, the projected number of students to be served in each grade, the number of students expected in each class, and the total number of students enrolled.*

Projected Student Enrollment Breakdown - The numbers provided below are estimates, and may fluctuate within each grade level depending on student enrollment and/or attrition in the respective grade levels. The projected student-to-teacher ratio shall be consistent with those required by the Class Size Reduction Act, as applied to charter schools. The school's staffing plan correlates with enrollment projections and is designed to employ sufficient personnel to ensure that the student to teacher ratio is followed in accordance with the law.

Yearly projections

School Year	Grade Levels	Total Projected Student Enrollment	Student Enrollment Capacity (if known)
First Year	6-8	200-250	
Second Year	6-8	250-375	
Third Year	6-8	300-375	
Fourth Year	6-8	350-375	
Fifth Year	6-8	375	

- These numbers may fluctuate on the condition that the school is able to provide a viable budget to sustain any varying enrollment number, at any grade level.

* The numbers provided herein are estimates, and may fluctuate within each grade level depending on student enrollment and/or attrition in the respective grade levels.

** The projected number of students per class shall be consistent with those required by Florida Law as applied to charter schools.

C. Provide a description of how the student population projections were developed.

Currently, Somerset Academy Inc. operates 50 charter schools in Florida, sixteen of which are high performing schools as designated by the Florida Department of Education, having met all criteria specified in F.S. 1002.331. This experience has also served to inform the Board that in order to deliver a quality high-school program with the necessary variety of options to address varied learner needs, there is a critical mass.

As noted in section 2.9.1, unlike the other charter schools in the district, the existing charter high school does **not** have a minimum or maximum enrollment (while we understand that the cover sheet for the SLCSB meeting agenda item stated a maximum enrollment of 1000, that was only a **description**. The binding document is the **contract** and the application as an addendum to the contract. The contract stipulates that we have a viable budget (with a 2.5% surplus) to support **any** enrollment. This means we can have one student, or 1 million students, as long as we have a viable budget. Also, see section 2.1 that addresses "capacity." Again, our enrollment is only inhibited by the space of our facility and our budget. Further, the application coversheet indicated 1000+ (note the + symbol) at maximum.

The following data was utilized in determining projections:

See next page:

Within 5 Mile Radius of 500 NW California Blvd Port St Lucie, FL 34986

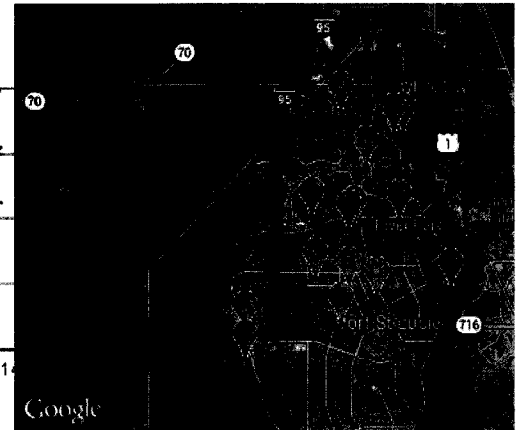
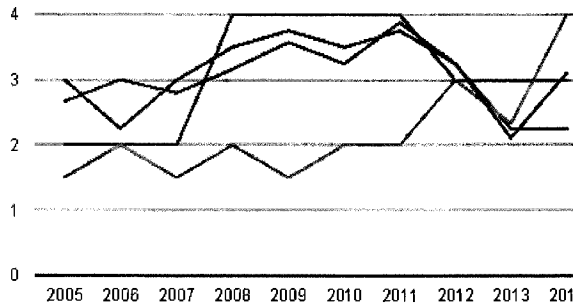
School Grades

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
School Grade: A	1	1	3	5	8	6	11	5	1	6
School Grade: B	4	4	2	5	4	6	3	8	5	3
School Grade: C	4	5	6	3	1	3	0	2	9	5
School Grade: D	1	1	1	0	1	0	1	0	1	1
School Grade: F	0	0	0	0	0	0	0	0	1	0
Charts										
Elementary Schools	3.00	2.25	3.00	3.50	3.75	3.50	3.75	3.25	2.25	2.25
Middle Schools	2.00	2.00	2.00	4.00	4.00	4.00	4.00	3.00	3.00	3.00
High Schools	1.50	2.00	1.50	2.00	1.50	2.00	2.00	3.00	2.33	4.00
Combination Schools	2.67	3.00	2.80	3.17	3.57	3.25	3.88	3.25	2.11	3.11
Other Schools										
FCAT Results Data										
Percent Tested	96%	98%	99%	98%	99%	99%	99%	99%	99%	99%
Points Earned	366	372	485	512	518	404	668	672	632	535
Rdg % Sat. of Higher	53%	56%	58%	60%	62%	63%	64%	54%	55%	55%
Rdg Points for Gains	56%	55%	58%	61%	62%	61%	61%	67%	64%	65%
Rdg Gains / Low 25%	54%	55%	57%	59%	63%	55%	61%	68%	66%	67%
Math % sat. or Higher	59%	61%	61%	65%	66%	68%	71%	54%	52%	55%
Math Points for Gains	66%	67%	64%	71%	69%	68%	71%	62%	62%	68%
Math Gains / Low 25%	0%	0%	64%	71%	68%	68%	72%	60%	60%	68%
Wrt % Sat. or Higher	77%	78%	84%	85%	87%	87%	86%	82%	49%	58%

Sci % Sat. or Higher	0%	0%	36%	38%	40%	43%	48%	37%	53%	52%
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GPA Progression

Map of Schools / School Grades

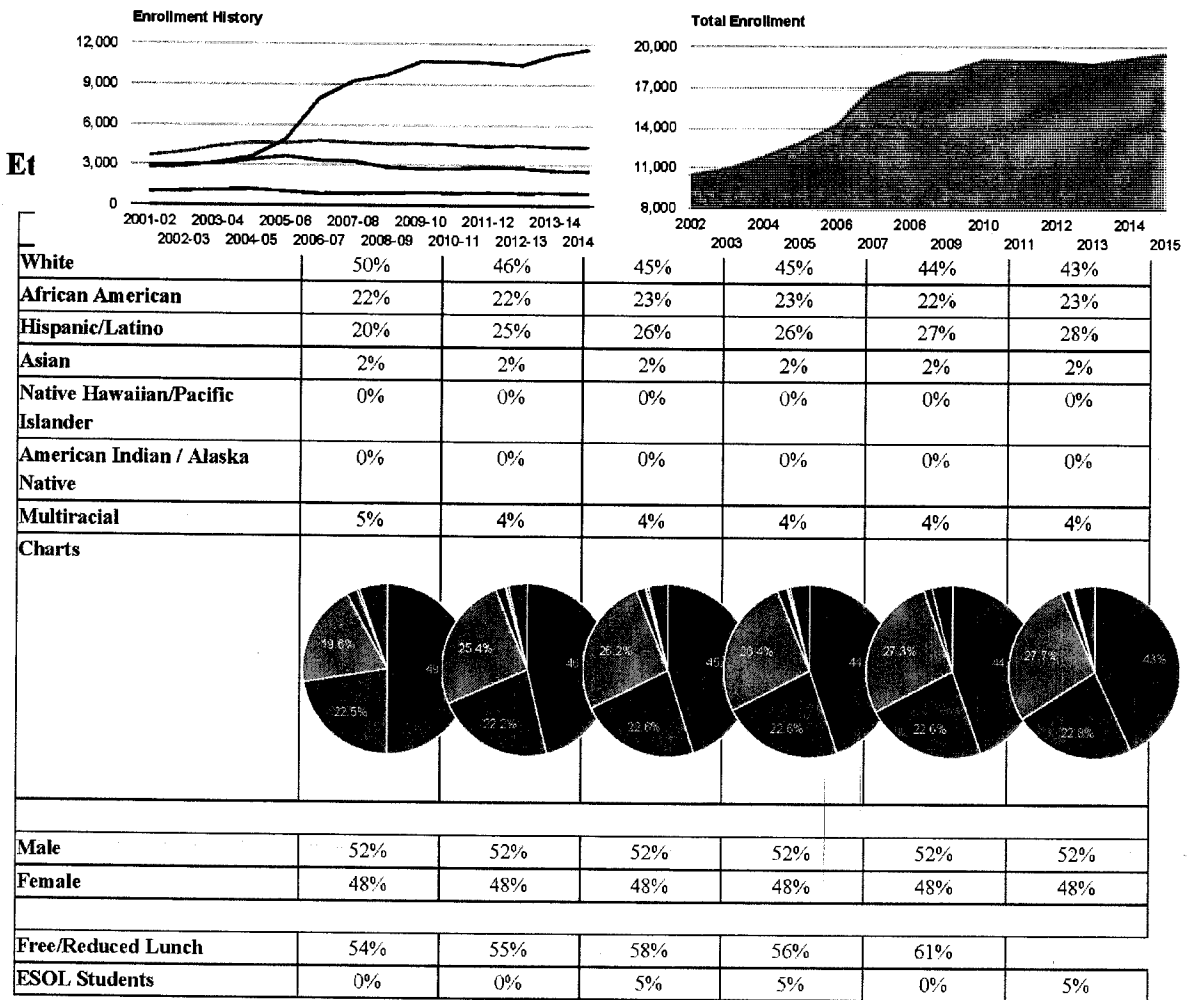


Enrollment Data

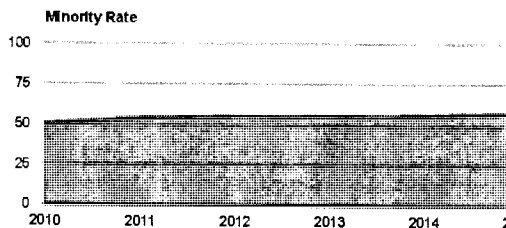
	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Total Enrollment	10,423	10,852	11,761	12,814	14,166	16,936	18,061	18,069	18,973	18,927	18,886	18,682	19,104	19,461
Kind	544	610	682	801	958	1,216	1,284	1,294	1,395	1,414	1,405	1,401	1,427	1,314
1st	620	585	670	794	945	1,210	1,381	1,310	1,439	1,442	1,425	1,423	1,460	1,528
2nd	611	614	621	736	942	1,175	1,333	1,338	1,426	1,445	1,458	1,406	1,477	1,585
3rd	628	591	704	725	931	1,280	1,400	1,398	1,616	1,534	1,581	1,494	1,603	1,629
4th	677	665	562	714	888	1,216	1,362	1,335	1,497	1,513	1,462	1,428	1,486	1,607
5th	634	712	710	645	907	1,192	1,376	1,414	1,523	1,524	1,568	1,516	1,550	1,544
6th	991	1,004	1,128	1,188	1,242	1,632	1,712	1,769	1,823	1,842	1,854	1,787	1,812	1,827
7th	1,005	1,045	1,121	1,283	1,309	1,581	1,823	1,739	1,912	1,858	1,790	1,833	1,868	1,917
8th	999	1,020	1,137	1,227	1,367	1,567	1,645	1,804	1,679	1,759	1,808	1,730	1,859	1,921
9th	1,390	1,313	1,507	1,510	1,402	1,413	1,361	1,254	1,287	1,198	1,145	1,255	1,158	1,158
10th	840	1,126	1,151	1,266	1,194	1,210	1,254	1,214	1,204	1,254	1,178	1,143	1,150	1,145
11th	810	791	952	1,101	1,175	1,142	1,102	1,189	1,121	1,069	1,122	1,107	1,057	1,095
12th	612	677	739	764	809	1,015	926	906	947	963	953	1,021	980	996
Elementary Schools	2,932	2,925	3,039	3,338	3,592	3,294	3,234	2,777	2,674	2,686	2,745	2,694	2,506	2,486
Middle Schools	994	1,035	1,123	1,176	1,028	860	864	928	956	935	975	939	950	901
High Schools	3,654	3,909	4,353	4,641	4,581	4,781	4,643	4,564	4,560	4,489	4,399	4,482	4,315	4,345
Combination Schools	2,781	2,884	3,169	3,599	4,868	7,914	9,218	9,695	10,679	10,705	10,630	10,429	11,116	11,534
Other Schools	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Enrollment Chart By School Type

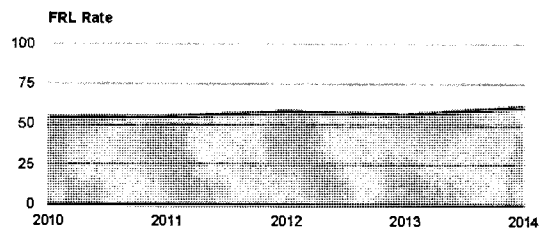
Total Enrollment Number Totals



Historical Minority Rate



Historical Free and Reduced Lunch Rates



List of Schools

Fau Lab Sch County

School	Type	FRL Rate	Minority Rate	Title 1	Enrollment	2014 Grade	Opened
Fau/slesd Palm Pointe Educational Research School @ Tradition	Combination Elementary and Secondary	51%	58%	Yes	1,388	A	2008

St. Lucie County

School	Type	FRL Rate	Minority Rate	Title I	Enrollment	2014 Grade	Opened
<u>Floresta Elementary School</u>	Elementary	72%	50%	Yes	625	A	0
<u>Bayshore Elementary School</u>	Elementary	76%	63%	Yes	714	C	0
<u>Parkway Elementary School</u>	Elementary	73%	63%	Yes	558	C	0
<u>Rivers Edge Elementary School</u>	Elementary	63%	43%	Yes	676	D	0
<u>Southern Oaks Middle School</u>	Middle / Jr. High	64%	53%	Yes	901	B	0
<u>Port St. Lucie High School</u>	Senior High	61%	51%	Yes	1,561	Pending	0
<u>St. Lucie West Centennial High</u>	Senior High	56%	55%	Yes	2,501	Pending	0
<u>College Preparatory Academy Of The Treasure Coast</u>	Senior High	43%	57%	Yes	301	A	2012
<u>Data House</u>	Senior High	0%	47%	Yes	15		0
<u>Mosaic Digital Academy (st. Lucie Virtual Franchise)</u>	Senior High	0%	0%	Yes	0		0
<u>St. Lucie West K-8 School</u>	Combination Elementary and Secondary	63%	60%	Yes	1,406	B	0
<u>Allapattah Flats K-8</u>	Combination Elementary and Secondary	74%	67%	Yes	983	C	0
<u>Northport K-8 School</u>	Combination Elementary and Secondary	73%	59%	Yes	1,234	C	0
<u>Oak Hammock K-8 School</u>	Combination Elementary and Secondary	62%	64%	Yes	1,493	B	0
<u>Manatee Academy K-8</u>	Combination Elementary and Secondary	69%	60%	Yes	1,564	C	0
<u>West Gate K-8 School</u>	Combination Elementary and Secondary	51%	57%	Yes	1,232	A	0
<u>Renaissance Charter School Of St. Lucie</u>	Combination Elementary and Secondary	50%	56%	Yes	1,276	A	2009
<u>Renaissance Charter School At Tradition</u>	Combination Elementary and Secondary	44%	51%	Yes	882	A	2013
<u>Mosaic Digital Academy</u>	Combination Elementary and Secondary	26%	40%	Yes	151	Pending	0

Section 3: Educational Program Design

- A. Describe the school's daily schedule and annual calendar, including the annual number of days and hours of instructional time.

Daily Schedule

The School will follow the annual calendar set forth by the District requiring at least a minimum of 180 days of instruction per calendar year. The hours of instructional time are aligned with state and district requirements for grades 6 through 8, including the state standards, as adopted.

Students in grades 6-8 receive instruction in the areas of Language Arts, Mathematics, Science, Social Studies, and Physical Education. In addition, students will have coursework in Foreign Language and Art on a weekly basis. This coursework is required by the state of Florida for all middle school students to progress to high school.

The school day shall consist of at least 400 minutes which provide for the minimum instructional minutes, as required by law, and all hours of instructional time will be aligned with state and district requirements for middle school grades. It is anticipated the School may operate from 8:15 am - 3:30 pm using one of the following options:

Option 1:- 4X4 COPERNICAN BLOCK (most probable option, as it aligns with the current HS schedule)

8:15-8:25 Homeroom-- 8:25-9:55 Period 1-- 9:55-10:00 Transition-- 10:00-11:30 Period 2-- 11:30-12:20 Lunch-- 12:20-1:50 Period 3-- 1:50-1:55 Transition-- 1:55-3:25 Period 4-- 3:25-3:30 Announcements-- 3:30 Dismissal

Option 2: - MODIFIED 8-PERIOD BLOCK

Monday to Thursday: 8:15-8:30 Homeroom-- 8:30-10:00 Period 1/2-- 10:00-10:05 Transition-- 10:05-11:35 Period 3/4 **11:35-12:20 Lunch** 12:20-12:25 Transition-- 12:25-1:55 Period 5/6-- 1:55-2:00 Transition-- 3:25-3:30 Period 7/8 --3:30 Dismissal

Friday: 8:15-9:00 Period 1-- 9:00-9:05 Transition-- 9:05-9:50 Period 2-- 9:50-9:55 Transition-- 9:55-10:40 Period 3-- 10:40-10:45 Transition-- 10:45-11:30 Period 4-- **11:30-12:10 Lunch**-- 12:10-12:15 Transition-- 12:15-1:00 Period 5-- 1:00-1:05 Transition-- 1:05-1:50 Period 6-- 1:50-1:55 Transition-- 1:55-2:40 Period 7-- 2:40-2:45 Transition-- 2:45-3:30 Period 8

Option 3: -MODIFIED 7-PERIOD BLOCK

1st Period 8:30 – 9:30-- 2nd/3rd Period 9:35 – 11:15-- 4th/5th Period 11:20 – 1:45-- 6th/7th Period 1:50 – 3:30

B. Describe the proposed charter school's educational program.

The educational philosophy for the School mirrors that of Somerset Chapel Trail and other Somerset Schools, and is one of High Expectations/High Achievement which also serves as the vision for the school. Academic excellence and performance drives the teachers' pedagogical efforts, and their commitment to the students manifests itself in all aspects of the School. Each student shall be challenged individually and in their academic peer group to perform to a level of highest independence as a learner. Teachers shall employ differentiated instruction, direct instruction, group frameworks and collaborative learning and the rotational instructional models as the primary instructional methods. In replicating Somerset Academy Middle School #5151, the School will follow some of the tenets that have made that school successful, including, but not limited to:

- ❖ A standards-based curriculum infusing a thematic approach to integrate core areas of study such as mathematics, literacy, English language arts, science, and social studies.
- ❖ Appropriate assessments for learning utilizing the diagnostic-formative-summative assessment cycle model
- ❖ Data-driven high quality differentiated instruction
- ❖ Supplemental programs for student advancement and remediation
- ❖ Support for teachers and ongoing professional development

In accordance with Federal and State laws regarding Response to Intervention, the school intends to utilize a multi-tiered approach to providing services and interventions for students.

Tier I is inclusive of all students at the School. All students in Tier 1 will receive high-quality, scientifically based instruction, differentiated to meet their needs, and will be screened on a periodic basis to identify struggling learners who need additional support, as is done at #5151. All students in Tier 1 will receive high-quality, scientifically based instruction, differentiated to meet their needs, and will be screened on a periodic basis to identify struggling learners who need additional support. Core academic interventions at this stage would include the use of the core curriculum and whole-class instruction and interventions, following research-based instructional strategies and best practices throughout the School. Core behavioral interventions would include school-wide discipline policies and procedures, as well as positive behavior supports. Academic assessments at the Tier I level would include benchmark assessments, classroom and textbook assessments as well as summative/end of year assessments. Behavioral assessments at the Tier I level would include observational data, parent conference records and disciplinary data. It is the intention of the State, Sponsor and the School that Tier I of the RtI process would successfully address the needs of at least 80-90% of the student population.

In Tier 2, students not making adequate progress in the core curriculum will be provided with increasingly intensive instruction matched to their needs on the basis of levels of performance and rates of progress, as is done at #5151, including, but not limited to: small group instruction, one-to-one re-teaching, twice weekly pull-out intervention, and/or mandated Sponsor remediation appropriate at the Tier 2 level. At this level, students will receive individualized, intensive interventions that target the students' skill deficits for the remediation of existing problems and the prevention of more severe problems. Additionally, students who need instructional assistance shall be placed in flexible tutorial opportunities with qualified personnel utilizing research based intervention systems, as is done at #5151. The academy will offer all general education courses (English/Language Arts, Math/Algebra,

Social Science/History, Science/Biology, etc) at a rigorous level. Assessments at this level would include behavioral observations, intervention data and gap analysis, in accordance with District guidelines. Tier 2 interventions would be initiated for the 10-15% of the student population that did not adequately respond to the general education interventions provided in the classroom throughout the Tier 1 process.

Tier 3 interventions would be introduced when students need a more frequent, intense and individualized instructional setting, which may include but would not be limited to: pull-out tutoring conducted three to five times weekly, or one-on-one instructions. Students who did not successfully respond to the Tier 1 and 2 interventions would receive appropriate interventions such as a behavior intervention plan, individualized counseling, and intensive individualized academic plans following assessments such as Functional Behavioral Analyses (FBA) and the use of progress monitoring graphs, as applicable and in accordance with District guidelines.

It is the commitment of each Somerset charter school to uphold high expectations for all, to create safe and caring learning environments, and to maintain a culture where parents, teachers, students, governing board and community stakeholders work as a cohesive team. It is this common commitment aligned with the vision to set high standards in developing life-long learners that has yielded Somerset's success. The driving force behind this success is the motivation and dedication of each stakeholder to not just maintain that vision, but to continuously strive to reach beyond it from year to year. The result has been a school system that is characterized by successful students, innovative educators, exceptional administrators, committed board members and engaged parents.

Excellence and performance drives the teacher's pedagogical efforts, and their commitment to the students manifests itself in all aspects of the school. Teachers will deliver instruction to address the Florida Standards, as adopted, and place emphasis in certain subject matters by employing effective research-based strategies such as hands-on learning, inquiry-based research projects, science experimentation, technology rich environments, CRISS (Creating Independence through Student-owned Strategies), Reciprocal Teaching, and high expectations for all students, to name a few. In replicating Somerset Academy Middle School #5151, the School will follow some of the tenets that have made that school successful, including, but not limited to:

- a standards-based curriculum infusing a thematic approach to integrate core areas of study such as mathematics, literacy, English language arts, science, and social studies;
- appropriate assessments for learning utilizing the diagnostic-formative-summative assessment cycle model;
- data-driven high quality differentiated instruction;
- supplemental programs for student advancement and/or remediation;
- support for teachers and ongoing professional development.

The School will also place a significant focus on technology. Teachers will be trained to use technology in unique methods to augment learning. The ultimate goal is to maintain traditional and proven effective teaching techniques with modern, innovative contemporary resources.

The applicant believes:

- Student learning is the primary focus of the School.
- Students learn in a variety of ways and should be given the opportunity to learn with different strategies and techniques.

- Administrators, teachers, staff, parents and community members agree to hold high goals and standards in order for students to achieve success.
- Parents and teachers are partners in the education process.
- The school community is committed to continuous improvement to enable students to become life-long learners.

Additionally, the following instructional techniques, utilized with success at #5151, will be incorporated throughout the curriculum in order to maximize learning and successful attainment of learning objectives and replicate quality:

Personalized Instruction – students may be grouped by ability (1) Students are grouped according to needs, abilities and interests; (2) the goal-setting mind frame is taught and established from a young age; (3) the older students develop leadership and mentoring qualities plus improve responsibility as the younger students obtain intellectual stimulation through the interactions; (4) social experiences for the students are broadened with increased opportunities to lead, collaborate, develop stable peer relationships, and establish ownership of the learning environment; (5) if needed, older students are provided the opportunity to reinforce subjects that need to be improved (6) action-consequence relationships are built and understood by the students; (7) the home-school connection is fostered and utilized to take learning beyond the classroom as well as developing ownership of learning for the students and their families; and (8) learning is enhanced through the use of inquiry based centers, small group interactive sessions, and individual pacing instruction

Target Tutoring – The School believes that each student has a distinctive learning style thus said School will use data driven instruction and remediation strategies to target each student’s academic need through tailored instruction. Additionally, the School will utilize data to enrich instruction and accelerate learning for students showing potential in specific areas. The School will provide opportunities and tutoring sessions to teach either one individual student or a small “targeted” number with the same instructional needs or potential. Students will be encouraged to discover their own learning style, highlight their strengths and help to develop in areas of weakness to make them self-aware and capable of overcoming difficulties that arise not only in the classroom, but beyond.

Differentiated and Standards-Based Instruction –Teachers will use differentiated instructional strategies that connect with individual students’ learning needs. Teachers can target varied learners by providing enriching activities to high performing students and remediation to lower performing students to better meet their specific needs. Teachers will manage instructional time to meet the standards while providing motivating, challenging, and meaningful experiences for students to receive and process information in ways that require differentiation of experience. These instructional practices will include:

Direct Instruction (lecturing/modeling): This technique will be used when teachers need to explain or demonstrate specific content and skills. Explicit, systematic instruction will be based on the Florida Standards/NGSSS, as adopted. This instruction is structured and based on mastery learning. Frequent curriculum-based assessments help group students by ability, leading to further differentiated strategies, which identify students who require additional intervention.

Professional Learning Committees (PLC): Each month, teachers participate in school-wide PLCs to reach professional development goals set for the school year. In order for all educators to collaborate, interact and share best practices, an alternating schedule is created so that various departments and/or grade levels can participate in the meetings. Having the opportunity to examine and reflect upon each others' standard-based instruction through cross-curricular collaboration is extremely beneficial for professional growth not only for an individual educator, but as a school. The meetings are pre-set from the beginning of the year in order to avoid scheduling conflicts.

Vertical Planning: Similar to PLCs, vertical planning affords our school the opportunity to close grade-level gaps, promote collaboration and open a forum for curriculum discussions. The unique setting of the School and the dedication to this type of planning will allow for students to seamlessly transition from one grade to the next.

Department meetings: On a bi-weekly basis, department heads gather and meet with their teachers to discuss a plethora of topics ranging from curriculum, lesson plans, school issues, etc. A set schedule is established at the beginning of the year.

Leadership meetings: On a bi-weekly basis administration, department heads, counselors and other pertinent staff meet to address current issues including discipline, state testing, county mandates, course recovery, etc.

Counselors: A close group of counselors serve as a constant resource for parents, teachers and students. They strive to ensure course credits are met, ESE accommodations are implemented, resolve issues, etc.

Scaffolding: Based on the previously mentioned assessments, teachers will ascertain the current developmental skills of individual students and provide support structures necessary to help students move to the next level. As the year goes on, students will become more adept at targeted skills and at directing their own learning, thus achieving an increased level of autonomy in the process.

Cooperative Learning: Teachers will guide small group learning sessions to increase communication and team-building skills. These teams of students will be divergently grouped according to ability, interest, background, etc.

Inquiry-Based Learning: Based on the Scientific Method, this student-centered strategy will require students to conduct investigations independent of the teacher, unless otherwise directed or guided through the process of discovery. Teachers will use this strategy in developing critical thinking and problem solving skills. There will also be emphasis on developing 21st century learners through technology-based instruction via eBooks.

Information Processing Strategies - Teaching students "how to" process information is a key factor in teaching students how to strategically organize, store, retrieve, and apply information presented. Such strategies will include memorization, KWL, reciprocal teaching, graphic organizing, scaffolding, or webbing.

Academic Excellence and Leadership Development are at the heart of the School's educational philosophy. Accordingly, the School's intellectual focus centers on high academic and behavioral expectations for all students communicated through the Code of Excellence and Code of Student Conduct.

"Pull and Push" Method of Instruction: The School will monitor student's academic and emotional progress using a "pull and push" method. Students may be either "pulled" out of a class for additional remediation or acceleration, based on their needs. Conversely, a teacher or interventionist may "push" into an existing class to facilitate either a remediation program or for students in need of additional educational stimulation to take the most challenging curriculum in which they can be successful to maximize upon their potential.

Home learning policy: The School expects that all teachers will grade, discuss, and comment on homework regularly. Attention will be given to both quality and quantity of home learning projects.

Horizontally and Vertically Aligned Instructional Teams: The School will use professional development throughout the school year to allow for common planning and teaching teams, both within grade levels and subject areas. Through professional development activities planned within the school calendar, teachers will have opportunities to reflect on best practices, discuss new research findings, review educational journals, and examine a student's body of work. A leadership team will be in place to ensure that horizontal and vertical planning is effective. Such a culture makes it safe for teachers to share universal goals, confront what is and is not working, and transform their own thinking and practice.

Vertical Alignment (by department): Courses will be correctly aligned and teachers will be permitted common planning time by department. This will permit teachers to quickly assess what students mastered in the preceding grade and focus on building skills and knowledge. This will help teachers avoid unnecessary reviewing and re-teaching, which often consumes valuable teaching time.

Horizontal Alignment (by grade level): The School will align lessons to the Florida Standards, as adopted, for each subject and grade level to address specific subject matter. Teachers will follow the same time lines and have common planning schedules. Such alignment is crucial in school systems dealing with state-mandated, standards-based assessments.

Teachers Developing Curriculum: Teachers will play an integral role in the development of curriculum, maintaining - and exceeding - the highest expectations- in alignment with the Florida Standards, as adopted. Curriculum development will reflect how best to present a core body of knowledge. Teacher participation in curriculum development will also serve to increase their "buy-in" to the pedagogical process

Changing Teacher Practices: The School will encourage teachers to be facilitators and providers of opportunities for learning, NOT merely providers of information. Using the differentiated instructional strategies described above, teachers will tailor their instruction and adjust the curriculum to students' needs rather than expecting students to modify themselves to fit the curriculum.

Community Partnerships: Teachers, students, parents and the administration will work together with the Board to identify potential community partners for service learning and other community based initiatives at the School. Additionally the School will provide enrichment activities and community-based initiatives allowing students to interact in social settings with diverse individuals.

Parental Involvement enhances learning when a school encourages parents to stimulate their children's intellectual development. Parental "investment" in a student's education is crucial to student success, as well as to the advancement of the School's mission and vision. Parental involvement agreements will encourage parents to contribute a minimum of 20 volunteer hours to ensure their active participation in their child's education. Parents will receive and sign a parent handbook that outlines the responsibilities they have for their child's learning and behavior at school and at home. Parental involvement will also be encouraged through (Parent Teacher Student Organization) PTSO and other such school commitments. Home-based volunteer projects will be available to parents who are unable to volunteer on-site due to work or family constraints.

Service Learning: Teachers will engage students in service-learning projects that start in the classroom and extend beyond it, encouraging responsible, caring participation in the local environment and in the wider world. Service-learning activities will be embedded in cores academic courses (English, Math, Science, Social Studies) to achieve the existing course objectives and to help students meet grade level standards.

C. Explain how the educational program aligns with the school's mission.

The educational philosophy is built on a set of core beliefs and values, discussed in the previous section, for the direct purpose of achieving the School's mission. For example, we believe that a common goal of high academic standards and behavioral expectations will foster responsible and self-directed learners; accordingly, the School's programs emphasize high academic and behavioral expectations for all students, emphasizing student and teacher self-awareness, goal setting and honest and open communication with parents. Students will understand and appreciate their learning styles, accommodate, plan, and monitor their learning, inspiring a desire and ability for life-long learning. The aforementioned concepts are embodied in the School program and serve as a vehicle to increase learning opportunities with special effort made to help low performing students have success and increased learning gains.

Somerset believes in providing opportunities for students to take ownership of their learning and to reflect on their work and its meaning and we also believe that learning should take place beyond the classroom. We have designed strategies to instill a love of learning through real world immersion practices and programs. Teachers will engage students in service-learning projects that start in the classroom and extend beyond it, encouraging responsible, caring participation in the local environment and in the wider world. These programs may include:

- School-based and community beautification projects
- Cross-content connections and projects

- Volunteerism and Community Service requirements
- Involvements in school organizations - Student council, student government, environmental club, Best Buddies (#5151), PTSO

The School expects to have a student population reflective of the community it will serve. The School's educational process relies on the partnership among the school, family, and community. The stakeholders of Somerset Academy, Inc. are committed to meet the needs of the target student population by hiring staff and creating a School Advisory Council (SAC) that will mirror the diverse characteristics and incorporate multiple perspectives in school development. Further, the Governing Board members reflect diversity in their personal and career backgrounds and areas of expertise. Their skills, ranging from business ownership to educational leadership, and then some, will serve to monitor and guide the school and surrounding community's reciprocal needs.

D. Explain how the services the school will provide to the target population will help them attain the Next Generation Sunshine State Standards, as required by section 1002.33, F.S.

The services that The School will provide to the target population will help them attain the Florida Standards, as required by law. Coursework at all grade levels will require students to perform high-level conceptual tasks, per Florida Standards. This type of training is mandatory in a college preparatory environment. At the same time, we recognize that higher-level conceptual thinking is only possible with a solid base of fundamental knowledge and skills. As E.D. Hirsch points out in The Schools We Need and Why We Don't Have Them, "The ability to learn something new depends on an ability to accommodate the new thing to the already known." Cognitive scientists describe this process as rendering skills and knowledge 'automatic.' Automatic recall of certain information is necessary for a student to succeed in sophisticated conceptual work. It is this scaffolding that will eventually lead to independent critical thinking and self directed learning. For example, the Reading Standards expect students to be able to decipher author's tone in order to analyze the purpose behind the use of that particular tone. So, the school will ensure that every student has mastered these fundamental skills. Students will be required to demonstrate what Benjamin Bloom labeled as basic knowledge, comprehension, and application of information; they will also cultivate the intellectual tools to analyze, synthesize, and evaluate what they are learning. This active learning in a rigorous academic setting will ultimately prepare the students for post secondary level of education. Because we recognize that students who fall behind in mastering basic knowledge and skills have little hope of being able to perform high level conceptual tasks, students who are failing one or more of their classes may be provided with lunch or after school tutoring or enrolled in a 'Saturday Prep Academy' which will reinforce basic skills and preview upcoming material. Students unable to participate in Saturday Academy for religious reasons may be enrolled in a similarly substantive after-school tutoring block.

We believe, like #5151, that these principles are best implemented through a curriculum that: 1) requires active engagement by doing (project based learning, Spring Board, kinesthetic activities, etc), 2) engages a broad range of learning modalities (TCI, HMH, RIM, etc), offering students multiple ways to demonstrate learning, 3) requires the use of imagination, creativity and application of knowledge, 4) inspires, motivates students, especially those who may struggle in other content area classes, 5) develops personal and social skills such as communication, cooperation, discipline, and perseverance, all of which will help to prepare students for high school

and college, ensuring a well-rounded, community minded individual. Guided by these principles, our program, like #5151, aims to achieve three learning goals: academic accomplishment, intellectual curiosity and civic engagement resulting in responsible citizens.

For purposes of this application, academic accomplishment is defined by the student reading effectively (Reading Benchmarks per Florida Standards), communicating powerfully (Language Arts per Florida Standards), identifying, calculating and solving problems accurately (Math per Florida Standards), while researching and organizing (Language Arts per Florida Standards) information logically all of which result in a self directed, critical thinker.

Intellectual curiosity will be stimulated, providing students the tools to find personal relevance and learning, apply learning across disciplines, and demonstrate awareness of one's own learning process. Civic engagement will be encouraged via active participation in the school community, and an understanding of and advocate for multiple perspectives, as is done at #5151. The Florida Standards will be achieved by students in Language Arts and Mathematics, as approved.

The School's curriculum is designed to serve students of all ability levels. All students at the School will be encouraged to maximize their academic potential by taking the most rigorous program in which they can be successful. Students in need of remediation or not making adequate progress towards mastery of the Florida Standards and/or students with special learning needs (e.g. ELL students and ESE students) may have access to supervised study time and tutoring services during non-school hours to accelerate and/or remediate student achievement. Teachers will be required to document instruction of the Florida Standards, ELL strategies in their lesson plans.

Lesson plans will identify specific objectives taught and benchmarks met as listed in the curriculum. The department head will check lesson plans bi-weekly and the principal will check them quarterly, as well as conduct daily classroom walk-through's (CWT) to ensure that curricular objectives are being documented and taught accordingly, as is done at #5151. In order to support delivery of a high quality program that implements research-based strategies and innovations to raise student achievement, the School will have the following processes in place:

Performance-based curricular objectives in alignment with the Florida Standards as adopted. Continuous review of curriculum to ensure a year's worth of learning of all state benchmarks research-based instructional practices and Coalition of Essential School's principles; focus on differentiated instruction for learning styles; integration of technology across all major disciplines; School Improvement Plan (SIP) process as a quality assurance and continuous improvement tool; assessment data utilized to make instructional decisions and plan interventions; ongoing professional development workshops; before and/or after school targeted tutoring for remediation and Saturday seminars for acceleration (at no cost to the students and snacks may be provided); targeted interventions for struggling readers and students performing below grade level; integration of long term "Project Based Learning" activities across the curriculum, as does #5151.

E. Describe the applicant's capacity to replicate an existing school design.

The capacity to replicate can be demonstrated by providing credible and well-defined strategies for replication, including the financial and human resources necessary to replicate the design.

The applicant's capacity to replicate an existing school design is evident by the success of the already existing 40+ replications. Although each Somerset school is permitted certain autonomy in order to meet the needs of the surrounding communities, all Somerset schools share central core values, best practice, and supports. The capacity for successful replication is evident by the collective accreditation as an A rated district.

Somerset Academy, Inc. is a Florida not-for-profit educational institution with a proven eighteen-year track record of successful development and operation of more than 48 high-performing charter schools serving over 15,600 students in Pre-K through 12th grade in Miami-Dade, Broward, Palm Beach, Monroe, St. Lucie (Somerset College Prep) and Duval counties, as well as D.C., Las Vegas, NV and San Antonio, TX. The institution and its board of directors have over a decade of experience in charter school operations and management and oversight of public funds.

Somerset Academy has developed a multi-tier system (management, instruction, assessment and professional development) that has achieved increased performance across all student populations and subgroups as evidenced by their academic performance over the past 10 years. Somerset Academy has been able to implement unique and innovative strategies aimed at student achievement and have proven these strategies to be successful with all student populations, including ELL and ESE students, as well as those entering the school below grade level. The results on standardized exams and learning gains, especially in mathematics, have proven its success. Somerset has successfully replicated 48 other high quality programs, which have and continue to increase student performance in grades K-12. Unique and innovative strategies aimed at student achievement are addressed throughout the application, including partnerships with community stakeholders, local universities, the implementation of interns for collaborative learning experiences from instructional staff all the way down to students; the utilization of Project CRISS, SpringBoard, MyAccess, Study Island, Turn It In, Reading Plus, Reading Counts, HMH, TCI, etc; the four basic tenets referenced in Section 1.C; all of which have been recognized and approved as appropriate innovations by the SLCSB, as is evident by the precedent set upon approval of the charter application for College Preparatory Academy of the Treasure Coast in 2011.

These programs have proven to be highly effective in improving the educational performance of their student populations as evidenced by their student populations as evidenced by their academic performance track record below:

See Next Page:

Somerset Academy, Inc. School's Report Card (Inception - 2013-2014 SY)

School	School ID	Year	Grade	Sum Points Earned	Meeting High Standards in Reading	Meeting High Standards in Math	Meeting High Standards in Writing	Meeting High Standards in Science	Free/Red Lunch	Minor Ra
Somerset Academy Charter	0520	2013-14	B	572	85	82	55	69	59	97
		2012-13	A	569	80	83	61	71	49	95
		2011-12	A	608	80	83	96	61	57	94
		2010-11	A	603	91	90	75	66	54	91
		2009-10	A	625	85	88	91	61	45	91
		2008-09	B	583	86	87	87	55	43	90
		2007-08	A	604	82	86	86	51	43	86
		2006-07	A	589	81	79	88	52	44	89
		2005-06	A	461	84	75	88	N/A	43	89
Somerset Academy Charter Elementary School (South Homestead)	0339	2013-14	B	502	60	62	21	57	76	88
		2012-13	B	516	58	53	77	73	73	85
		2011-12	B	502	66	61	77	56	73	85
		2010-11	A	645	74	82	87	50	67	85
		2009-10	D	422	61	54	83	34	61	82
Somerset Academy Elementary School South Miami Campus	2007	2013-14	A	758	91	86	65	80	16	89
		2012-13	A	616	84	86	67	73	15	87
		2011-12	A	668	89	89	92	74	14	85
		2010-11	A	693	91	93	88	80	14	70
		2009-10	N/A	594	91	91	93	79	12	81
Somerset Arts Academy	2012	2013-14	C	486	71	71	62	40	62	70
		2012-13	C	492	66	70	48	47	30	68
		2011-12	B	509	67	56	89	57	52	65
		2010-11	A	558	78	79	81	50	33	65
		2009-10	N/A	495	82	84	89	50	48	67
Somerset Academy-Elementary, Eagle Campus	1251	2013-14	C	435	53	42	52	12	52	96
		2012-13	B	503	65	67	55	44	41	94
		2011-12	A	580	69	52	93	62	32	94
		2010-11	N/A	480	69	75	67	41	30	96
Somerset Academy	5141	2013-14	A	583	82	79	68	69	31	90
		2012-13	A	556	75	77	84	60	36	90
		2011-12	A	584	77	72	92	56	35	90
		2010-11	A	566	83	86	86	61	31	91
		2009-10	B	536	86	84	97	53	37	91
		2008-09	A	601	85	86	96	53	19	87
		2007-08	A	568	81	80	91	51	15	86
		2006-07	A	580	82	78	93	56	14	82
		2005-06	A	431	82	76	76	N/A	13	80
		2004-05	A	451	81	76	85	N/A	15	76
		2003-04	A	418	75	71	90	N/A	13	72
		2002-03	B	403	73	68	81	N/A	9	68
Somerset Academy Davie Charter	5211	2013-14	A	537	78	78	50	53	45	57
		2012-13	A	561	86	83	50	76	36	60

		2011-12	A	588	80	80	83	63	40	61
		2010-11	A	661	94	92	90	75	42	59
		2009-10	A	625	92	92	82	63	45	60
		2008-09	A	656	90	90	96	56	99	62
Somerset Academy East Preparatory	5391	2013-14	A	604	61	73	33	88	78	96
		2012-13	A	572	64	61	69	71	80	96
		2011-12	A	533	56	54	72	71	82	97
		2010-11	A	552	63	72	81	67	73	96
		2009-10	C	487	68	59	84	29	69	95
Somerset Academy Elementary (Miramar Campus)	5405	2013-14	A	631	86	84	86	71	57	93
		2012-13	A	605	77	82	70	61	63	93
		2011-12	A	642	73	80	97	64	62	93
		2010-11	A	593	86	85	96	53	55	91
		2009-10	A	579	81	81	94	59	61	93
		2008-09	A	565	81	78	84	43	57	94
		2007-08	A	582	75	75	88	55	43	93
		2006-07	B	502	77	77	100	48	39	91
Somerset Pines Academy	5030	2013-14	B	572	57	46	58	42	65	61
		2012-13	C	438	55	46	56	38	59	58
		2011-12	C	488	63	52	59	51	64	61
		2010-11	C	463	73	75	68	51	63	62
Somerset Academy Charter School at North Lauderdale	5003	2013-14	D	410	39	29	33	27	97	96
		2012-13	C	533	48	42	50	45	91	95
		2011-12	C	542	48	37	75	34	85	96
		2010-11	D	417	51	52	69	19	81	94
Somerset Village Academy	5004	2013-14	C	458	50	49	29	46	94	90
		2012-13	C	447	40	45	50	29	89	89
		2011-12	C	467	35	37	83	27	83	85
		2010-11	C	453	66	61	67	24	81	80
Somerset Academy (Silver Palms)	0332	2013-14	A	628	67	74	50	43	81	94
		2012-13	A	623	67	67	61	43	84	94
		2011-12	A	619	62	55	89	42	82	94
Somerset Academy at Silver Palms	4012	2013-14	A	618	82	83	64	54	82	97
		2012-13	B	495	63	57	51	32	85	96
		2011-12	A	541	60	53	74	50	82	96
Somerset Grace Academy	5008	2013-14	A	744	89	91	94	92	10	77
		2012-13	N/A	618	84	78	77	53	4	71
Somerset Academy (Pompano)	5387	2013-14	F	358	36	22	61	51	81	86
Somerset Neighborhood School	5021	2013-14	A	531	71	70	46	56	75	98
		2012-13	B	495	67	59	40	56	66	98
		2011-12	A	525	62	58	87	39	60	95
		2010-11								
		2009-10	N/A	452	69	75	81	35	66	71
Somerset Academy Pompano	5388	2013-14	F	383	33	34	52	17	79	78
		2012-13	N/A	193	29	24	36	30	78	82

Somerset Academy	5501	2013-14	F	216	25	15	5	22	55	92
Somerset Academy Boca East	3413	2013-14	B	498	75	64	58	56	24	50
Somerset Academy Bay	5062	2013-14	A	593	84	76	84	79	12	83
Somerset Academy Middle (Miramar Campus)	5406	2013-14	A	672	78	83	60	50	65	95
		2012-13	A	623	76	79	62	42	68	93
		2011-12	A	696	68	84	90	51	67	94
		2010-11	A	642	82	88	97	62	55	91
		2009-10	A	605	77	76	96	46	59	92
		2008-09	A	610	73	78	100	60	54	89
		2007-08	A	534	72	64	95	43	46	93
Somerset Academy Middle School	5151	2013-14	A	691	78	79	77	66	33	88
		2012-13	A	674	79	78	74	68	32	89
		2011-12	A	688	76	76	95	70	38	86
		2010-11	A	604	83	81	93	61	27	86
		2009-10	A	606	80	80	93	67	28	79
		2008-09	A	580	76	80	96	52	21	81
		2007-08	A	563	74	74	97	52	16	78
		2006-07	A	539	72	68	94	43	20	79
		2005-06	A	464	70	71	91	N/A	17	79
		2004-05	B	409	60	65	93	N/A	18	80
		2003-04	A	413	61	61	87	N/A	9	76
		2002-03	A	442	66	68	95	N/A	15	72
Somerset Academy Village Charter Middle School	5002	2013-14	C	551	44	45	38	46	91	91
		2012-13	D	399	43	39	30	37	87	93
		2011-12	C	439	42	34	75	27	84	82
		2010-11	C	438	50	39	90	49	87	80
Somerset Charter Middle School	5441	2013-14	A	608	61	52	66	39	73	98
		2012-13	C	497	54	45	52	35	69	98
		2011-12	B	548	50	49	88	33	67	96
		2010-11	A	544	74	52	90	49	79	97
Somerset Academy Charter Middle School	6004	2013-14	A	724	79	88	64	78	67	91
		2012-13	A	670	75	80	48	54	50	92
		2011-12	A	702	77	73	95	77	54	89
		2010-11	A	575	81	77	79	76	46	87
		2009-10	A	618	83	84	85	45	37	87
		2008-09	A	587	74	75	94	37	46	90
		2007-08	A	557	68	71	95	38	46	90
		2006-07	B	504	77	62	90	34	36	89
		2005-06	A	485	81	74	88	N/A	32	89
		2004-05	D	282	29	18	81	N/A	50	92
		1998-99								
Somerset Academy Charter Middle School (South Homestead)	6013	2013-14	A	619	60	59	60	46	78	84
		2012-13	A	604	66	56	40	60	75	82
		2011-12	B	560	58	47	85	39	72	76

		2010-11	A	591	70	72	89	63	65	77	
		2009-10	A	552	67	66	94	15	53	77	
		2008-09	N/A	693	90	90	94	39	86	93	
Somerset Academy Middle Country Palms	6043	2013-14	A	669	88	77	54	50	64	75	
		2012-13	C	491	68	53	51	47	24	63	
		2011-12	N/A	418	39	33	77	45	61	61	
		2010-11									
		2009-10	N/A	397	55	0	89	39	27	100	
		2008-09	N/A	451	60	40	94	39	64	100	
		2013-14	A	758	91	86	65	80	8	79	
Somerset Academy Charter Middle School South Miami	6053	2012-13	A	697	86	76	80	66	18	83	
		2011-12	A	656	85	70	100	63	15	82	
		2010-11	A	645	93	89	84	47	8	82	
		2009-10	N/A	647	91	100	89	39	8	67	
		2013-14	B	560	61	52	73	23	49	93	
Somerset Academy-Middle, Eagle Campus	1261	2012-13	A	615	59	57	63	17	36	94	
		2011-12	B	579	51	50	96	17	35	94	
		2010-11	A	558	66	63	86	36	31	92	
		2013-14	B	579	72	70	66	58	23	36	
Somerset Academy at Silver Palms	4012	2012-13	B	445	63	57	51	32	85	96	
		2011-12	A	541	60	53	74	50	82	96	
		2013-14	A	577	77	73	66	53	22	61	
Somerset Academy Boca Middle School	4041	2013-14	A	577	77	73	66	53	22	61	
Somerset Academy Hollywood Middle School	5419	2013-14	A	535	62	54	65	50	80	80	
Somerset Academy Pomapano Middle	5413	2013-14	B	508	55	50	65	50	96	91	
Somerset Academy Bay Middle School	6128	2013-14	A	593	84	76	84	79	16	84	
Somerset Academy Charter High	5221	2013-14	A	644	73	84	80	88	40	87	
		2012-13	A	605	68	79	79	76	36	85	
		2011-12	A	591	63	77	94	N/A	43	83	
		2010-11	A	532	59	86	80	41	36	81	
		2009-10	A	556	57	85	91	34	36	85	
		2008-09	A	529	48	85	83	22	26	82	
		2007-08	B	495	50	76	84	17	20	83	
		2006-07	C	444	35	66	93	33	21	83	
		2005-06	B	408	47	74	94	N/A	19	83	
		2004-05	C	351	35	69	82	N/A	17	85	
		2003-04	N/A	383	35	71	84	N/A	14	79	
Somerset Arts Conservatory	5396	2013-14	A	653	86	90	93	87	39	80	
		2012-13	A	690	78	92	91	94	37	82	
		2011-12	A	628	78	95	100	N/A	47	82	
		2010-11	A	629	75	91	100	62	36	87	
		2009-10	A	582	79	88	96	25	22	90	
		2008-09	N/A	608	67	96	88	39	15	81	

Somerset Academy Charter High School	7042	2013-14	A	593	66	81	63	82	78	93
		2012-13	A	580	67	71	71	80	80	94
		2011-12	A	591	46	73	88	N/A	82	95
		2010-11	A	541	37	93	75	43	81	94
		2009-10	A	538	51	83	87	46	72	94
		2008-09	B	508	49	77	85	33	76	94
		2007-08								
		2006-07	A	594	64	93	83	30	29	90
Somerset Academy Charter High School (Miramar Campus)	5007	2013-14	B	536	50	65	70	67	76	97
		2012-13	B	463	46	52	71	35	73	97
		2011-12	A	461	50	48	95	N/A	54	94
Somerset Academy Charter High at North Lauderdale	5006	2013-14	F	409	36	46	58	51	97	96
		2012-13	B	513	34	55	45	56	80	94
		2011-12	F	387	25	26	70	N/A	73	95
Somerset Academy Charter High School (South Homestead)	7034	2013-14	C	461	48	46	76	60	75	80
		2012-13	N/A	567	52	69	62	76	78	76
		2011-12	N/A	467	42	64	85	N/A	70	85
Somerset Academy Charter High	7038	2013-14	A	618	73	92	64	79	73	90
		2012-13								
		2011-12								
		2010-11								
		2009-10	N/A	524	38	77	85	34	80	85
Somerset Eagle High School	1381	2013-14	F	317	24	42	67	24	57	95
		2012-13	N/A	554	20	82	69	69	45	86
Somerset Academy Canyons High School	4013	2013-14	B	556	69	87	74	71	27	55
College Preparatory Academy of the Treasure Coast	0712	2013-14	A	581	60	80	56	60	45	53
		2012-13	C	483	45	62	52	63	58	63

Section 4: Curriculum Plan

- A. *Describe the school's curriculum in the core academic areas, illustrating how it will prepare students to achieve the Next Generation Sunshine State Standards.*

The school's curriculum in the core academic areas and educational model will be developed with the Florida Standards, as adopted, as its core. Through higher performance/greater achievement, students will go beyond the basic expectations and build their knowledge and skills as they work in their majors and prepare for post secondary work. This model will offer a balanced academic program, which will emphasize interdisciplinary study, reading and writing across the curriculum with internships in their majors. All students will have a Personal Learning Plan (PLP). These portfolios will include work demonstrating a student's progress towards 8th grade and high school preparedness. The PLP will serve as their progression to high school plan to provide a seamless path while in middle school and pave the way for matriculation into their secondary studies and ultimately into the collegiate world. The school's educational model will place significant emphasis on reading, writing, language arts, mathematics, science, social studies, wellness, the arts, foreign languages and technology.

The objectives and goals in the Somerset Academy curriculum are built upon the Standards as adopted. The School's curriculum will focus on clear and measurable expectations for student learning and covers the main subject areas of English Language Arts (ELA), Mathematics, Social Studies, Science, Foreign Language, Music, Art, Life Skills, Character, Physical Education/Health and Computer Education. The curriculum will continuously reflect high quality instruction and implement research based strategies, innovations and activities that facilitate achievement for all students.

Somerset Academy uses state-adopted and researched based-curriculum infusing best practices to ensure that the students are engaged and challenged on a daily basis. The curriculum is data-driven and therefore modified to serve the needs of the student population at each school.

The School will seek to expand each student's foundation in each core subject and to build upon the preceding acquired knowledge base in each succeeding grade level, always moving forward, to ensure the student builds capacity and is not only college bound but also college ready.

All course offerings will be, at minimum, aligned with St. Lucie County Public Schools' Curriculum Course Codes and will cover all content specified in FL-DOE Course content descriptions. The school's curriculum will be standards-based and will ensure student mastery of the following:

- Florida Standards in English/Language Arts and Mathematics
- Florida Standards for Science and Social Studies, and
- Next Generation Sunshine State Standards in all other subject areas beyond to E/LA and Mathematics.

The school will have the following processes in place to support the delivery of the curriculum:

- Continuous review of curriculum to ensure a year's worth of learning of all state/national – benchmarks

- Research-based instructional practices
- Principal evaluation through weekly classroom walkthroughs (principal is expected to have strong awareness that all teachers are utilizing the best practices and implementing the instructional initiatives with fidelity)
- The School Improvement Plan (SIP) (as required) will be used as a quality assurance tool to ensure that the curriculum goals are being accomplished.
- Assessment data to make instructional decisions and plan interventions
- Staff development through the implementation of Professional Learning Communities (i.e., Common Planning, ongoing whole staff and small group professional development, Lesson Study and Action Research)
- Weekly grade level or departmental level and monthly staff/faculty meetings
- Ongoing professional development workshops and peer to peer trainings
- Afterschool, lunch and Saturday tutoring for remediation and acceleration
- Implementation of Response to Intervention, which targets students who struggle in literacy and/or mathematics and students performing below grade level.
- Multiple ELL and ESE strategies across the curriculum
- Focus on differentiated instruction for learning styles
- Integration of technology across all major disciplines
- Focus on the selection of resources that have text complexity/rigor
- Incorporation of Webb's Depth of Knowledge to springboard critical thinking
- Integration of speaking and listening performance activities that entail both real time engagement and advance preparation

The curriculum will continuously reflect high quality instruction and implement research based strategies, innovations and activities that facilitate achievement for all students. Somerset uses Florida Department of Education (FL-DOE) adopted researched based textbooks aligned with State Standards and/or national standards and are accompanied by supplementary materials. Although the School will implement state approved curriculum, Somerset will enrich the curriculum through its system approved supplementary programs and their innovative approach to delivering the curriculum and meeting expectations. Both challenge and intervention materials are incorporated to address the needs of special populations of learners, such as Gifted, ESE and ELL students. The goal of Somerset is to collaborate and work together with the district to meet the expectations of the sponsor while incorporating an innovative approach through the delivery, of

its programs, and its approach to instruction that have proven to be successful throughout Somerset Academy, Inc and all applicable replications.

The faculty will follow the standards to develop lesson plans accordingly. Teachers will follow the state mandated RtI process to monitor interventions being delivered to all students that demonstrate a need based on state assessments and teacher recommendation. Teachers will also adhere to LEP plans to ensure all ELL students are being taught utilizing ELL strategies and ESE strategies to ensure each student is receiving the support needed to meet the set objectives. The lesson plans are submitted to school leaders and returned with feedback for ongoing improvement. The Reading Coach will also be responsible to review and monitor lessons, Differentiated Instruction and delivery of instruction. The Reading Coach will support classroom teachers and model sample lessons to ensure all teachers meet the school's expectation. Shared planning will occur, as well, to ensure that each educator is able to select the most successful instructional strategies (listed below and utilized at #5151 and other Somerset schools) that will yield the greatest results.

Interdisciplinary Connections - Curricular decisions will be guided by the aim thorough student mastery and achievement rather than by an effort merely to cover content. As teachers build on interdisciplinary connections, students naturally begin to link information between and among courses, increasing the relevancy of skills and content in such courses.

Differentiated and Standards-Based Instruction – The School's ultimate goal is to provide a learning environment that will maximize the potential for student success. Teachers will use differentiated instructional strategies that connect with individual student's learning needs. Teachers will manage instructional time to meet the standards while providing motivating, challenging, and meaningful experiences for students to receive and process information in ways that require differentiation of experience. These instructional practices will include:

Gradual Release of Responsibility Model (teacher-directed instruction/modeling/guided practice/independent practice): this methodology will be used when teachers need to explain or demonstrate specific content and skills. Explicit, systematic instruction will be based on the Standards. This instruction is structured and based on mastery learning. Frequent Curriculum-based assessments help place students in ability groups for further differentiated strategies and identify students who require additional intervention.

Scaffolding: Teachers will identify the current developmental skills of individual students based on assessments and provide support structures to help students move to the next level. As the year goes on, the student becomes more adept at skills and at directing his or her learning, and becomes more autonomous

Cooperative Learning: Teachers will guide small-group learning, to increase communication and team-building skills. It is based on grouping small teams of students heterogeneously according to ability, interest, background, etc. Some Cooperative learning activities will include Jigsaw II, STAD- Student Teams, or Group Investigation.

Inquiry-Based Learning: Based on the scientific method, this student-centered strategy will require students to conduct investigations independent of the teacher, unless otherwise directed or guided through the process of discovery. Teachers will use this strategy in developing critical thinking and problem solving skills.

Information Processing Strategies: Teaching students "how to" process information is a key factor in teaching students how to strategically organize, store, retrieve, and apply information presented. Such strategies will include memorization, KWL, reciprocal teaching, graphic organizing, thinking maps, scaffolding, or webbing

Rubrics: Explicitly teaching students a set of criteria for assessing a particular type of work or performance.

Positive Behavior Support: We believe that both teachers and students need to be provided with a consistent behavior management system so that maximum time can be spent teaching and learning. Inappropriate behaviors that interfere with the learning process and the expectations set for character development can be reduced and ultimately extinguished through consistent, best practice behavior management techniques. Behavior management plans/system will be in place in all classrooms from the beginning of the first year of operation. Pre-service and in-service training will be required of all teachers. Each teacher, then, will be given the opportunity to implement her/his own behavior management techniques in their respective classrooms.

Accountability - Teachers at the school are required to document instruction of the Common Core Standards (including ELL and ESE strategies) by completing daily lesson plans, as well as records of weekly and monthly thematic unit plans. Lesson plans identify specific objectives taught and benchmarks met as listed in the curriculum. The administrative team (principal, assistant principal, and curriculum coaches) will check lesson plans weekly and conduct daily Classroom Walk-Throughs to ensure that curricular objectives are being documented in each teacher's lesson plan book and taught accordingly.

-Course recovery: At the close of each quarter, any student that has earned an "F" in a core class is given the opportunity to recover that course during non-school hours including but not limited to Saturday mornings and afterschool hours. In the event the student passes the online course, the previous "F" grade will be adjusted to a "D."

English Language Arts

The School's Language Arts program will include strategies for students reading at grade level or higher, as well as for students who are reading below grade level. It is expected that students will master reading, writing, and verbal skills through continuous infusion of reading skills in all subject areas. The program emphasizes critical and creative thinking skills through instruction aligned to the Standards. Lessons will be based on broad topics covering the reading process, literary analysis, the writing process, communication, information while integrating with the content areas.

The Standards set requirements not only for English language arts (ELA) but also for literacy in history/social studies, science, and technical subjects. Students will learn to read, write, speak, listen, and use language effectively in a variety of content areas. Moreover, students will acquire literacy skills and understanding required for college and career readiness in multiple disciplines.

The implementation of the Standards will offer a focus for instruction and help ensure that students gain adequate exposure to a wide-range of texts. Rigor is also infused through the requirement that students read increasingly complex texts through the grades. Students will also demonstrate an

increasing sophistication in all aspects of language use, from vocabulary and syntax to the development and organization of ideas. Students advancing grade to grade are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in the previous year.

In replicating #5151, the School will use the state-approved Houghton Mifflin Harcourt Florida Connections or other state- adopted text in the instruction of English Language Arts, supplemented with SpringBoard and other materials as classroom teachers see fit.

-Battle of the Books: Students read 5 books chosen by the head of the competition (typically a principal or lead teacher at a participating Somerset). Each team of 6 from all participating Somerset schools will be asked questions about those books. If the team answers the question correctly they will be awarded points. If the team answers incorrectly, another team will be given a chance to steal the question for less points.

-Spelling Bee: Students compete in a school-site spelling bee to start. Each grade level winner has the honor of participating in the Somerset Inc. spelling bee where they compete against 50 other Somerset school winners.

The Writing Process: All students will be required to write on a daily basis across the curriculum (i.e. Argumentative, Informative/Explanatory, and Narrative Writing). Each Language Arts/English class will be responsible for an ongoing writing project that is appropriate to each grade level. The ongoing writing strategies which include development of organization, and style as appropriate to task, purpose and audience, planning, revising, editing, rewriting, or trying a new approach, and using technology to produce and publish writing and interact and collaborate with others, and conduct research to build and present knowledge will help students to become effective writers and enhance student performance on State writing assessments. Writing will also be stressed throughout the curriculum through projects such as daily journal entries and a school newspaper. The use of technology in the writing process further enhances the program, as students publish their work. Writing skills that enhance the students' ability to perform well on the Writing Assessments will be incorporated into the curriculum. Writing before, during, and after the main story selection from the state adopted text will provide systematic, explicit writing instruction and ample practice in spelling, grammar, usage, and mechanics daily. Teachers will use various methods to assist students in mastering the writing process. Methods such as Four Square Writing Method and computer-based programs such as turnitin.com and Study Island will be utilized in the classroom to implement writing lessons.

Reading/Language Arts

(The Reading Curriculum is described in detail in question C below)

SCPAMS will mirror Somerset Chapel Trail #5151. Each grade level at Somerset Chapel Trail offers regular and advanced language arts courses. They have and we will have intensive and advanced reading classes at each middle school grade as well. All 6th graders will be required to take a reading class. Students will be placed based on their FSA scores. After 6th grade, reading is an elective (except intensive, which is state mandated). The School will also have Creative Writing as an elective, as does Chapel Trail. Mirroring Somerset Chapel Trail, the School's MS

LA classes will use HMH Collections, supplemented by College Board SpringBoard and other materials. The Intensive classes will be using a combination of PW Impact, Reading Plus, novel studies and needs-based interventions, at minimum, as does Chapel Trail. The school will supplement with Hampton Brown National Geographic, Scholastic Reading Counts Program, Study Island, and may incorporate Pearson supplementary. The Advanced Reading classes will be novel-based courses. The School's teachers will design the electives curricula, mirroring Chapel Trail. LA classes will include writing throughout the year, so a typical day may be revising or editing an essay, going through novels and working on a mini-lesson from Collections. Reading classes would include strategy lessons and computer work as part of the rotational instructional model. The English department will have a heavy writing emphasis due to the additional requirements in the writing component of the FSA. The School will mimic Chapel Trail's teacher-designed writing units and will engage students with debatable writing topics for them to argue. The reading classes will innovate as Chapel Trail does, by incorporating an iPad-based or computer based curriculum and students will use the computers every day.

•**English:** HMH Florida Collections will be primary. The Official College Board's Pre-AP program Springboard will be supplementary in the English Language Arts classes, as may any combination of the aforementioned curriculum.

•**Writing:** Competence in writing is for many a laborious process. It presumes competence in clarity of thought, logic in the ordering of ideas and mastery of the mechanic of grammar and syntax. All teachers will be teachers of writing assuring that students write regularly with purpose in all subject areas. All classroom activities and assessments will incorporate a writing component. In addition to the required English/Language Arts, students will be given the opportunity to take courses furthering their understanding of technical writing, journalism, critical thinking, and writing for pleasure. Students may have the option of taking a creative writing course utilizing teacher-developed curriculum.

The following resources and strategies may be used primarily or supplementary in the delivery of the Reading and Language Arts Curriculum:

Grades	Reading	Writing/LA
6-8	National Geographic Hampton Brown Edge, Jamestown, Glencoe Reader, Study Island	HMH Florida Collections, Journeys, Spring Board by College Board My Access Writing by Vantage Learning

The curriculum may be further supplemented with Study Island or Reading Plus, both of which are interactive, diagnostic software, for the technology component of The Rotational Instructional Model, which will be the model by which instruction will be imparted.

The Reading/Language Arts program includes strategies for students reading at grade level or higher, as well as for students who are reading below grade level. It is expected that students will master reading, writing, and verbal skills through continuous infusion of reading skills in all subject areas. Course content for these courses will be delivered in accordance with course descriptions provided by the FL-DOE and will ensure mastery of Florida Standards. Teachers will provide instruction in Language Arts using the Florida Standards to promote academic excellence

in reading, writing, speaking, listening, and language. The College and Career Readiness (CCR) Anchor Standards will help teachers define college and career readiness expectations while the grade specific ELA standards will guide instruction at each grade level and help ensure that students gain adequate exposure to an increasing complex range of texts and tasks as they progress. The courses will cover the application of the writing process, effective use of speaking and listening and language skills, higher-order critical thinking and literacy skills in preparation for overall post-secondary preparedness.

CCR Anchor Standards for Reading – there are 10 standards divided among:

- Key Ideas and Details
- Craft and Structure
- Integration of Knowledge and Ideas
- Range of Reading and Level of Text Complexity

Grade Level Standards for Reading

- Reading: Literature Grade 6 -8
- Reading: Informational Texts

Reading standard focus on text complexity and the growth of comprehension in reading. The Reading standards place equal emphasis on the sophistication of what students read and the skill with which they read. Whatever they are reading, students must also show a steadily growing ability to discern more from and make fuller use of text, including making an increasing number of connections among ideas and between texts, considering a wider range of textual evidence, and becoming more sensitive to inconsistencies, ambiguities, and poor reasoning in texts.

Sixth grade students will receive 90 minutes of consecutive, uninterrupted, daily instruction in Reading/Language Arts. Students who have been identified through the RtI/MTSS process as Tier 2, will receive a minimum of 30 minutes of uninterrupted, daily, immediate intensive intervention (iii) in addition to instruction in the 90-minute block. Individual intervention beyond the initial block and iii is required for students, which have been identified through the RtI/MTSS process as Tier 3. The school may chose to modify time requirements in art, music, and/or social science in order to provide these interventions, as long as students receive a minimum of 30 minutes in music and in art and minimum of 60 minutes for Social Science per week. Time requirements may be modified for students requiring intervention in Tiers 2 and 3 as long as a minimum of 60 minutes of instruction is provided weekly.

“**Charter Schools** - Please note that charter schools must be given the opportunity to participate in the district plan. Charter schools that choose to participate in the plan must meet the requirements and guidance outlined in this document; however, they may meet these requirements through methods that differ from those in the district plan. For example, if an entire school district uses one core reading program in their elementary schools, and the elementary charter school chooses to use another state-adopted core program, this is acceptable.” https://app1.fl DOE.org/Reading_Plans/Examples/Reading_Plan_guidance_2014.pdf

The School will implement the Sponsor’s state-adopted **Comprehensive Research-Based Reading Plan (CRRP)**, as established by the FL-DOE in the instruction of Reading. The School may use the State approved **National Geographic Hampton Brown Edge (Cengage) Levels A**

and B. This program provides appropriate literacy instruction in all six of the components of reading. The instruction in this comprehensive program is designed to meet the individual needs of all learners, and utilizes small group instruction and leveled text to differentiate learning. The School plans to use state-adopted instructional materials, including digital software and multimedia in the instruction of Reading/Language Arts. The school commits to use these or other digital state-adopted materials in accordance with the district's adoption for 2015 and as approved by the district/state for use by the charter school.

Students with Disabilities (SWD) will have the same instructional time (90 minutes of uninterrupted daily instruction) in reading/language arts only within a single instructional setting. The general education classroom will be the first placement consideration for scheduling and providing access to these courses for students with disabilities. Students in need of immediate intensive intervention in reading will be scheduled for a minimum of an additional 30 minutes daily during the school day in alignment with the Sponsor's CRRP. English Language Learners (ELLs) will have the same instructional time as non-ELLs for language arts/reading.

In order to build skills and accelerate academic growth in the following reading areas: Phonics, phonemic awareness, fluency, oral language, vocabulary, and comprehension. The following programs may be used:

The **Triumphs Program** is an addition to the Core reading program. Triumphs is used as an intervention program for the students that are not working on grade level. The program consists of below level readers, letter tiles, word cards, a teacher's manual, and whiteboards for small groups. Triumphs is an approved program for the teachers to use as a Response to Intervention (RTI).

PLORES (Predict, Locate, Organize, Read, Evaluate , Summary) - is a Reading Strategy used to help increase comprehension. This strategy helps the reader locate information to answer questions. Teachers will utilize this reading strategy in all their lessons and ensure that students are utilizing the strategy.

CRISS Strategies (CReating Independence through Student-owned Strategies) - Project CRISS is an educational initiative designed to help students of all abilities learn content information across the curriculum and throughout the grade levels. Teachers will utilize CRISS strategies in all their lessons.

Reading Plus- Reading Plus is a computer-based program used by students in grades 3-8. Reading Plus monitors student's silent reading skills. The Florida State Standards are incorporated into the Reading Plus lessons. Reading Plus is a researched based program that has been proven to increase reading levels and test scores.

Accelerated Reader- is motivational program that encourages independent reading and includes on-line quizzes to measure comprehension and vocabulary.

Book of the Month - The Language Arts Department will promote a new book every month that we will celebrate as Book of the Month. The title of the Book of the Month will be posted in the school office and serve as a vehicle for cross-curricular educational projects.

Differentiated Instruction meets the demands of the differing learning abilities in the same class. For optimal instruction, students will be grouped in various ways and in flexible setting to accommodate varying reading levels and learning styles. Teachers will utilize the methods of whole-group instruction, small-group instruction, individual instruction, and independent reading to address the various needs of the students.

Print Rich Environment - Each class will maintain a classroom library to include a collection of quality literature that includes material written at varying reading levels and in a variety of genre forms, inclusive of both fiction and nonfiction. This collection will offer students reading material that will support their individual interests and abilities. Frequent successful reading experiences using appropriate texts will provide the opportunity to improve their reading proficiency with regard to fluency, vocabulary, and comprehension. The books in the classroom library will be attractively displayed to exhibit an inviting accessibility to all students. Teachers will organize classrooms to afford students ample opportunities for, and easy access to, reading materials during literacy center time within the daily reading block.

Word Walls - Teachers will create effective word walls that consist of high frequency words, word patterns or phonic elements, and interesting, exciting words. Students will use word wall during lessons and activities to practice recognizing words quickly and accurately.

Centers/Differentiated Instruction - Reading centers will be set up throughout the room in various areas to allow students to work independently or in a small group setting, using instructional materials to explore and expand their literacy. During this time students will be engaged in a variety of activities that reinforce and extend learning without the assistance of the classroom teacher. Students will practice reading, writing, speaking, listening, and working with letters and words. Manipulative may be used to increase active participation and provide additional guided practice through multi-sensory approaches. For example during:

- **guided reading center**, students work with the teacher to read and practice the weekly reading strategies and skills using text at their level and focusing on each individual weakness (differentiated instruction).
- **writing center**, students will practice their writing skills related to the week's writing focus. Students will move through the writing process at their own pace.
- **test prep center**, students will participate in practice of reading skills and strategies relevant to their grade level grade reading. Students will work independently and alongside a teacher when it is time to review the content.
- **technology center**, students will log on the Reading Plus or Study Island software program where they will receiving reading enrichment that challenges them according to their reading rate and comprehension level

Teachers will provide instruction in Reading and Language Arts using the Language Arts Florida Standards (LAFS) to promote academic excellence in Reading, Speaking & Listening, Language and Writing. The grade specific LAFS will guide instruction at each grade level and help ensure that students gain adequate exposure to an increasing complex range of texts and tasks as they

progress from grade to grade. The school's curriculum will cover the standards within each of the Clusters in each Strand.

At the middle school level, the Language Arts program will provide instruction and promote academic excellence in reading, writing, oral communications, and the interpretation of literature. The Language Arts program will reflect critical and creative thinking and a balance of its several components, including reading, writing, speaking, listening and viewing. Teachers will address Florida State Standards and utilize benchmarks for Language Arts instruction/coursework to prepare students for mastery of those standards. The Program will further develop student's ability to communicate, clearly, accurately and effectively in speech and writing. The content will include, but not be limited to, the study and interpretation of traditional and contemporary literature, application of the writing process, formal grammar and usage, and effective use of speaking and listening skills, higher-order reading skills, and study skills enabling success in school and beyond when entering the world of work.

In middle school Language Arts classes, we will use the HMH, Collections, Journeys curriculum, along with **SpringBoard** as a supplemental material (endorsed and/or recommended by the CollegeBoard), to ensure that rigor, relevance and relationships can be drawn and students can meet and/or exceed goals set forth in this petition and by the proposed school, moving forward.

The curriculum will develop learners' understanding, knowledge and skills, and through the delivery of a performance-based Language Arts/Literacy curriculum, will address national standards of education, including but not limited to Florida Standards for English/Language Arts, as applicable, by grade level and/or course subject. The teaching of Language Arts at the middle school level will develop students' abilities to use language effectively, to communicate in speech and in writing and to respond with understanding and insight to a wide range of texts. The School will continue to emphasize Listening, Speaking, Reading, and Writing, across all curriculum areas and grade levels, including content areas, and will utilize the Florida Literacy Standards to through all content areas in grades 6-8 to drive instruction in all content areas.

Thus, students will have achieved a year's worth of learning by mastering, at minimum, the objectives within each standard.

Middle School Reading/Language Arts Courses:

***Reading Required Elective Grade 6** - Reading is a fundamental component of life in its entirety. To function adequately in our bustling, technology-driven society, you must possess the basic skill of reading. If you want to be successful in school you have to demonstrate the ability to acclimate yourself to new concepts with a satisfactory degree of understanding. This skill set is not only required for reading classes, but for all other subject areas in school. The ability to read inspires confidence in a student in regard to retaining and regurgitating information. As a learner begins to accurately understand information, there is a feeling of satisfaction that encourages more engagement with processing academic data. With more success comes a personal understanding of a wide range of concepts that continues to stimulate mental activity. When a student understands what is taking place in the classroom, they are more likely to be successful.

Due to overriding research that suggests that students who enter high school without the ability to read on grade level the school has instituted a policy that 6th grade students regardless of reading ability or test scores are required to take a Reading elective at the advanced, regular or intensive level. This course will be used as a “gate keeper” to insure that as students move from grade 6-8 that they will be more likely to be successful students beyond middle school.

Initial placement in intensive reading will be determined by the student’s previous year's FSA ELA reading score. In the intensive reading courses, a variety of assessment data including FAIR data, SRI, FSA data, and Interim data will be used to identify deficiencies and provide targeted interventions through differentiated instruction. Results of ongoing progress monitoring assessments will drive instruction towards mastery of the grade level standards for reading.

***Intensive Reading Enrichment courses** are meant for bubble students or for students who scores regressed from the previous year (e.g. achievement levels dropped from a level 3, 4, or 5 to a level 2). These courses will be in addition to the regular language arts courses and may be offered as electives. Students scoring at Levels 1 and 2 on the most recent administration of the state standardized reading assessment are to be enrolled in M/J Intensive Reading in addition to their required M/J Language Arts course in grades 6, 7, and 8. A double literacy block for all Level 1 reading students, who have reading deficiencies in decoding and fluency (Intensive Reading Plus), will be instituted on daily basis. All Level 1 students will be required to enroll in an Intensive Reading or Intensive Reading Plus course, with the exception of ELL students who are required to enroll in an M/J Developmental Language Arts through ESOL course.

Intensive Reading courses will be in addition to the required M/J Language Arts course in grades 6, 7, and 8. All Level 1 and 2 students, regardless of whether they are fluent, will be placed in the appropriate reading class as follows:

- Intensive Reading Plus (IR+) is intended for students with deficiencies in decoding and fluency in addition to vocabulary and comprehension. All students, with the exception of all ELL students, with deficiencies in decoding and fluency, who scored Level 1 or 2 in reading on the most recent applicable administration of the state standardized reading assessment will be placed in an Intensive Reading Plus (IR+) class.
- Intensive Reading (IR) is intended for students with deficiencies in vocabulary and comprehension. All students, with the exception of all ELL students with deficiencies in vocabulary and comprehension, who scored Level 1 or 2 in reading on the most recent applicable administration of the state standardized reading assessment will be placed in an Intensive Reading (IR) class. This class will focus on effective reading strategies and differentiated instruction that reinforces whole group instruction and provides opportunity for intervention within the classroom context.
- Intensive Reading Enrichment (IR-EN) is Intensive Reading Enrichment (IR-EN) – intended for students whose most recent applicable administration of the state standardized reading assessment scores have regressed from Level 3 or higher to Level 2 and students with high Level 2 scores. All students, with the exception of all ELL students with high Level 2 scores or who have regressed from Level 3 or higher to Level 2 on the most recent applicable administration of the state

standardized reading assessment will be placed in an Intensive Reading Enrichment (IR-EN) class. The class will focus on specific reading strategies targeted to enrich the level of instruction to significantly improve students' vocabulary and comprehension achievement using selected grade level text and novel units.

ESOL Courses: A student identified, as ELL will be placed in two ESOL courses as applicable to the student's grade level and language proficiency:

- M/J Language Arts Through ESOL - content course scheduled by grade level; and
- M/J Developmental Language Arts Through ESOL - Language proficiency course scheduled by English Proficiency Level 1-4. If levels need to be combined, the Developmental Language Arts Through ESOL placement may be in the best combination of mixed language level courses (ESOL levels 1/2 or 3/4).

*Advanced and Advanced Gifted Courses will be offered depending on the need of the student population.

The Writing Standards focus mainly on text types, production and distribution of writing, research and range of writing in the upper grades. To build a foundation, students need to learn to use writing as a way of offering and supporting opinions, demonstrating understanding of the subjects they are studying, and conveying real and imagined experiences and events. The Standards acknowledge the fact that whereas some writing skills, such as the ability to plan, revise, edit, and publish, are applicable to many types of writing, other skills are more properly defined in terms of specific writing types: arguments, informative/explanatory texts, and narratives. The school will thus use project-based writing activities throughout the curriculum to develop students' capacity to build knowledge on a subject through research projects and to respond analytically to literary and informational sources.

To meet these goals, teachers will be expected to provide students significant opportunities and time and to writing, producing numerous pieces over short and extended time frames throughout the year. All students will be required to write on a daily basis across the curriculum (i.e. Informative, Persuasive, and Creative Writing). The ongoing writing strategies such as Prewriting, Drafting, Revising, Editing for Language Conventions, and Publishing will help develop effective writers and enhance student performance on District and State writing assessments.

Writing Across the Curriculum- Writing will also be incorporated across the curriculum through the utilization of CRISS strategies including but not limited to reader response logs, two-column notes, perspective journal entries, completing framed paragraphs, or RAFT - essay writing that includes a role, audience, format and a topic, plus a strong verb. Students writing after reading may include: quick-writes, mapping, brainstorming, essay questions and/or journal entries, writing a summary, a learning log entry, writing peer responses, or creating a summary poem. Writing before, during, and after the main story selection from the state adopted text will provide systematic, explicit writing instruction and ample practice in spelling, grammar, usage, and mechanics daily.

The use of technology in the writing process further enhances the program, as students publish their work. Writing before, during, and after the main story selection from the state adopted text will provide systematic, explicit writing instruction and ample practice in spelling, grammar, usage, and mechanics daily. Accordingly, students will receive 150 minutes of weekly writing instruction with a minimum of 30-minute instructional blocks in the ELA courses.

The following resources and strategies will be used in the delivery of the Writing Curriculum:

Six-Traits of Writing Model is used to help students recognize characteristics or “traits” of effective writing. When a student can recognize and copy each trait, better writing is the result. There are six such traits for good writing: Ideas and Content, Organization, Voice, Word Choice, Sentence Fluency and Conventions.

The Six-Trait Model for Writing Instruction and Assessment has an easy-to-understand, practical vocabulary that can be adapted to fit 6-8 students and a variety of modes/genres of writing. Traits are usually introduced one at a time to the student. Typically one trait is taught and practiced over a month long process. Conventions (capitalization, spelling, word usage, grammar and punctuation), however, is a trait that begins at the start of the school year and continues throughout.

Six Traits also uses a rubric to evaluate the strengths of each trait. These are infused into the writing curriculum as the trait is learned and practiced to provide feedback to the students. Six Trait rubrics and state rubrics will be used together to strengthen the writing process and provide feedback.

Posters regarding the traits will be placed in classrooms as a reminder to the students that writing standards to be upheld. The advantages of the knowing Six Traits will then apply across the curriculum.

Monthly Writing Prompts- Teachers will give the school-wide monthly prompt to their students. Teachers will keep record of their students’ scores. Teachers will monitor and adjust writing instruction based on the students’ progress through the monthly writing prompts.

4 Square - Four-square writing is a method of teaching basic writing skills to students that is applicable across grade levels and curriculum areas. It can be applied for the narrative, descriptive, expository and persuasive forms of writing.

Prewriting and organizational skills are taught through the use of a graphic organizer. This visual and kinesthetic aid is employed to focus writing, to provide detail and to enhance word choice. The visual organizers help students to conceptualize, understand, and structure a piece of written discourse successfully.

CCR Anchor Standards for Writing

- Text Types and Purposes
- Production and Distribution of Writing
- Research to Build and Present Knowledge
- Range of Writing

Grade Level Specific Standards for Writing

- Text Types and Purposes
- Production and Distribution of Writing
- Research to Build and Present Knowledge
- Range of Writing

Writing standards focus mainly on text types, responding to reading, and research. To build a foundation for college and career readiness, students need to learn to use writing as a way of offering and supporting opinions, demonstrating understanding of the subjects they are studying, and conveying real and imagined experiences and events. The Standards acknowledge the fact that whereas some writing skills, such as the ability to plan, revise, edit, and publish, are applicable to many types of writing, other skills are more properly defined in terms of specific writing types: arguments, informative/explanatory texts, and narratives. They learn to appreciate that a key purpose of writing is to communicate clearly to an external audience and they begin to adapt the form and content of their writing to accomplish a particular task and purpose. They develop the capacity to build knowledge on a subject through research projects and to respond analytically to literary and informational sources.

To meet these goals, teachers will be expected to provide students significant opportunities and time and to writing, producing numerous pieces over short and extended time frames throughout the year.

Writing will also be stressed throughout the curriculum through projects such as daily journal entries and a school newspaper. The use of technology in the writing process further enhances the program, as students publish their work. Writing before, during, and after the main story selection from the state adopted text will provide systematic, explicit writing instruction and ample practice in spelling, grammar, usage, and mechanics daily.

Through the Language Arts Curriculum, students will enhance writing skills through daily writing assignments in various modes, including, but not limited to, expository, persuasive and narrative, through the delivery of the HMH curriculum, with CollegeBoard –**SpringBoard** curriculum supplementing. Additionally, all students at the proposed school will be required to write across the curriculum on a daily basis. Elements of focus, organization, support, and conventions of sentence structure, students will also receive instruction in the correct use of standard English conventions to minimize errors of sentence structure, mechanics, usage, punctuation and spelling. Additionally, the School will also strengthen the requirements for quality of details, requiring use of relevant, logical, and plausible support, rather than contrived statistical claims or unsubstantiated generalities, while students learn to create the expectation that relevant supporting detail for clarification of meaning are the expectation for quality writing at all grade levels. Lastly, the Writing curriculum will prepare students in the elements of writing persuasive responses that will be expected at the subsequent stage of their academic career.

To that end, all students will also be required to write across the curriculum on a daily basis. Additionally, there will be an emphasis on the writing process, amongst all grade levels. A writing journal will be required for all students. Each class will be responsible for an on-going writing project that is embedded within the thematic unit of study. The use of technology in the writing process will enhance the program, as students publish their work.

Grade 6

M/J Language Arts I

M/J Language Arts I Advanced

M/J Language Arts I Advanced Gifted 1001020 M/J LANG ARTS 1, ADV to meet the needs of advanced and gifted students. A modifier to be added to include enrichment for students w/ EPs as needed.

M/J Language Arts I through ESOL

M/J Reading I

M/J Reading I Advanced

M/J Intensive Reading-Grade 6

1000010 M/J INTENS READ (MC). There is no grade associated with it-this is from 6-8 courses.

M/J Reading Enrichment-

1008010 M/J READ 1, 1008020 M/J READ 1 ADV, 1008040 M/J READ 2, 1008050 M/J READ 2 ADV, 1008070 M/J READ 3, 1008080 M/J READ 3 ADV

Grade 7

M/J Creative Writing

M/J Language Arts II

M/J Language Arts II Advanced

M/J Language Arts II Advanced Gifted-

1001050 M/J LANG ARTS 2, ADV to meet the needs of advanced and gifted students. A modifier to be added to include enrichment for students w/ EPs as needed

M/J Language Arts II through ESOL

M/J Intensive Reading-Grade 7-

1000010 M/J INTENS READ (MC). There is no grade associated with it-this is from 6-8 courses.

M/J Intensive Reading Enrichment

Grade 8

M/J Language Arts III

M/J Language Arts III Advanced

M/J Language Arts III Advanced Gifted-

1001080 M/J LANG ARTS 3, ADV to meet the needs of advanced and gifted students. A modifier to be added to include enrichment for students w/ EPs as needed

M/J Language Arts III through ESOL

M/J Intensive Reading-Grade 8-

~~1000010~~ M/J INTENS READ (MC). There is no grade associated with it-this is from 6-8 courses.

M/J Intensive Reading Enrichment

Mathematics

Students will receive 60 minutes of consecutive and uninterrupted, daily instruction in mathematics. The required program of study for Mathematics will be aligned to state requirements, including the **Mathematics Florida Standards (MAFS)**. The School will develop students understanding of mathematical concepts as well as their ability to engage mathematics to reason, communicate, and problem solve making them able to remain competitive in an ever changing, fast-paced and technology-rich society. The cultivation of these skills will help students develop numerical literacy, wherein they will have acquired the mathematical knowledge, problem solving ability, and communication skills required to excel at or above grade level expectations.

Grades 6-8 The School will follow the state course descriptions for the following courses to be offered in grades 6-8. The purposes of these courses are to provide instruction and promote academic excellence in basic mathematic skills, geometry, algebra, problem solving, and mathematical reasoning. The skills covered will prepare students for state standardized assessments and EOC, as well as promote student success for the real world work environment.

The School's mathematics curriculum intends to develop students' understanding of mathematical concepts as well as their ability to engage mathematics to reason, communicate, and problem solve making them able to remain competitive in an ever changing, fast-paced and technology-rich society. The teachers will be able to plan for mathematics lessons that meet the MAFS and achieve at minimum a year's worth of learning for each student covering the Mathematics Standards under each of the following domains:

- Counting and Cardinality
- Operations and Algebraic Thinking
- Number and Operations in Base of Ten
- Measurement and Data
- Geometry
- Number and Operations – Fractions

Furthermore, teachers at the School will focus on how the following five (5) standards that describe how content is taught:

- Problem Solving: Engage in tasks for which the solution method is not known in advance.
- Reasoning and Proof: Think analytically.
- Communication: Share ideas and clarify understanding.
- Representation: Understand ways in which mathematical ideas are represented.

- Connections: Understand how mathematical ideas interconnect and build on one another.

The School will develop students understanding of mathematical concepts as well as their ability to engage mathematics to reason, communicate, and problem solve making them able to remain competitive in an ever changing, fast-paced and technology-rich society. The cultivation of these skills will help students develop numerical literacy, wherein they will have acquired the mathematical knowledge, problem solving ability, and communication skills required to excel in our ever changing world.

The School plans to use state-adopted instructional materials, including digital software and multimedia in the instruction of Mathematics. The school commits to use these or other digital state-adopted, as approved by the state for use by the charter school. The Mathematics curriculum will be aligned with NCTM Principles and Florida Standards for Mathematics by grade level.

Holt McDougal Geometry
Geometry
Holt McDougal Algebra 2
Holt McDougal Algebra 1
Holt McDougal Algebra Larson Algebra
Pre-Calculus with limits
Calculus 10Edition
Blitzer Algebra and Trigonometry
The Practice of Statistics
The Discovery of Statistics

Mirroring Chapel Trail, Math 1, Math 2, Pre-Algebra, and GEM 6. Math 2 is a mix of Regular Math 2 students and Math 2 Advanced (which are 6th graders in 7th grade math). Pre-Algebra is a mix of Regular Pre-Algebra students and 7th grade advanced students in Pre-Algebra. The School will also offer Intensive 6th, 7th, and 8th grade.

Currently the Chapel Trail middle school curriculum is based on the Go Math textbooks which is from the HMH collection. The school will implement that, and use the online component that goes along with that. Chapel Trail also uses Study Island (as does the existing charter high school) for extra online practice, so the School will implement that, as well. The middle school teachers will also use the FSA warm-up and practice tests provided by Chapel Trail to help recall and review previous material and prepare for the FSA. The School, in alignment with Chapel Trail, will also use Cpalms as a reference for the standards. The intensive material may be pulled from the Triumph Online curriculum, and teacher designed curriculum based on student need/weakness. An innovating lesson will involve relating the lesson being taught to real-world experience.

- Teaching the students to think critically and get a deeper understanding of the material being taught in the class.
- Differentiating the way the lesson is taught to reach all of the students in the class.
- Using data to see what lessons need to reviewed or retaught.

The School will develop students understanding of mathematical concepts as well as their ability to engage mathematics to reason, communicate, and problem solve making them able to remain competitive in an ever changing, fast-paced and technology-rich society. The cultivation of these skills will help students develop numerical literacy, wherein they will have acquired the mathematical knowledge, problem solving ability, and communication skills required to excel at or above grade level expectations.

The School will provide quality instruction, high expectations, and consistent standards-based instruction for all students. The content will be challenging for all students and based on the assumption that all students can achieve high standards if given stimulating opportunities and differentiated instructional support to learn. The School will also infuse literature and technology into Mathematics instruction. This will provide for reinforcement of mathematical terminology, real world applications of mathematical concepts, and organization/visualization of mathematical concepts (e.g. word walls, journals for hypothesizing and/or subsequent reflection of mathematical conclusions, graphing software, interactive white boards, to name a few.)

Focusing on the school's mission of individualizing instruction and providing a unique learning environment through the use of museum exhibits, facilities, and resources: Teachers will use varying methods of instruction to address diverse learning styles.

Examples are as follows:

Classroom is arranged to enable active engagement by all students

- whole-group instruction
- teacher-led small groups instruction*
- cooperative learning groups
- independent student centers

*Small group instruction is provided at different levels based on data and depending on student need.

Sample Math Centers – The number of students in each group may vary based on understanding of concept. If a student is struggling with daily concept the teacher may provide scaffolding and support through:

- **Reteach** - Teacher provides problems and step-by-step support for better understanding
- **Enrichment**- teacher provides problems that command a greater depth of knowledge
- **Mathletics**- challenges students' based on level and allows students to choose a concept to practice

Mathematics “print rich environment” - math word walls and bulletin boards will reflect taught and current mathematics topics

Math Intervention Program

MathSteps is an intervention program for students in kindergarten through middle school, reflecting current and confirmed research in the area of direct instruction and experimental research.

Remediation for students will take place during the school day. For example, students will have one of their electives replaced with a required Intensive Mathematics class. In addition, to time during school hours for intervention the students will participate in after-school and Saturday tutorial sessions.

6th Grade

M/J Intensive Mathematics

M/J Mathematics I

M/J Mathematics I Advanced

M/J Mathematics I Advanced Gifted-

1205020* M/J MATH 1 ADV to meet the needs of advanced and gifted students. A modifier be added to include enrichment for students w/ EPs as needed

7th Grade

M/J Intensive Mathematics

M/J Mathematics II

M/J Mathematics II Advanced

M/J Mathematics II Advanced Gifted-

1205050* M/J MATH 2, ADV to meet the needs of advanced and gifted students. A modifier to be added to include enrichment for students w/ EPs as needed

8th Grade

M/J Intensive Mathematics

M/J Mathematics III (Pre-Algebra)-

1205070 or equivalent of pre-alg

Algebra I Honors

Algebra I Honors Gifted-

High School Course Credit 1200320* ALG 1 HON A modifier to be added to include enrichment for students w/ EPs as needed

Geometry I Honors

Geometry I Honors Gifted-

* High School Course Credit 1206320* GEO HON A modifier to be added to include enrichment for students w/ EPs as needed

Middle School Mathematics Courses *All Level 1 and 2 students will be required to enroll in an M/J Intensive Mathematics.

**** Senior High School Credit(s) for Students in Grades 6, 7, and 8. Students may enroll in selected senior high school courses for the purposes of pursuing a more rigorous program of study in both Algebra I and Geometry; however, students are required to adhere to End of Course requirements as stated by the Florida Department of Education.**

Science

The Science curriculum will prepare students to achieve the Standards by incorporating an inquiry based approach to learning of the central Science. The Science Curriculum addresses the Bodies of Knowledge (BOK) in science: the Nature of Science, Earth and Space Science, Life Science, and Physical Science to meet the specified annually assessed and content-sampled benchmarks found in the Standards. Teachers will plan science instruction that meets the standards benchmarks grouped in nine-week clusters.

The School plans to use state-adopted instructional materials, including digital software and multimedia in the instruction of Science. The following texts and curriculum are currently being used at #5151, and therefore, in an effort to replicate, will be used on some combination at The School:

Modern Biology
Ap Biology
Florida EOC Coach Biology 1
Florida EOC Coach Jumpstart
Prentice Hall Biology Exploring Life
Marine Biology: The Dynamic Ocean
Physics: Principles and Problems
Physical Science Concept in Action
College Physics
Interactive Science Course 1
Interactive Science Course 2
Interactive Science Course 3
Chemistry (Addison/Wesley)
Glenco Science 8th Level Green
Glenco Science 8th Level Red
Glenco Science 8 th Level Blue
Glenco Health 2015
Teen Health
Mader's Understanding Human Anatomy
Ap Chem: College Board Guided
Multiple Choice Constructed Resp.
Glenco Science Chemistry
Chemistry: The Central Science
AP Multiple Choice Students Sol.

The School will use state-approved Glencoe Sciences, as does Chapel Trail, alongside their digital software and multimedia or other state-adopted materials in the instruction of Science. The Science curriculum will prepare students to achieve the Standards by utilizing an inquiry based approach for the investigation and application of central science themes: matter and energy, force and motion, earth and space, processes of life, and the scientific method. Teachers will utilize the Florida Standards Literacy Standards for Science in the development of effective daily lesson plans and consequently as the framework for the preparation of science lessons and laboratories. Students will participate in weekly hands-on science inquiry-based investigations, thus building a rich critical-thinking foundation. Students will be encouraged to participate in science endeavors outside of the classroom such as science fairs and targeted field trips where they will have opportunities to observe and apply concepts introduced in the classroom. Additionally, supplemental materials such as Science Weekly, and/or other comparable scientific, age and content appropriate magazines may be used in order to help students appreciate the role of research in the field of science.

The School will adapt its pacing guides based on those used at Chapel Trail. Various resources will be used, within the school and within the community. Inside the classroom, the Glencoe 2008 Red, Green and Blue textbooks will be used, as well as the teacher resource disks. Within the disks are various workbooks and supplements for each topic. Within the classroom, other resources include Gizmos (virtual labs), Digital path notes (online notes from the Fusion workbook), Brain Pop, Kahoot, and various power points for interactive notes. The students will use the Fusion workbooks for home learning as well as Study Island.

A typical class is 90 minutes in length. It will include some type of bellwork activity followed by class instruction and multiple other activities. These activities are planned to practice science knowledge and skills. Lesson plans take into consideration the standard specifications for middle school science.

Teachers will be encouraged to engage students through the following ways:

- Quantitative and qualitative observations
- Investigation of thoughtful questions
- Design and conduct experiments and other types of investigations
- Collect and organize data
- Make logical predictions and offer reasonable explanations
- Explore possible conclusions
- Communicate their understanding

Additional Science instructional materials will be gathered for lesson plans using the following resources:

- Science FCAT 2.0 Resources
- National Institute for Science Education
- National Science Teachers Association
- Technology: Including but not limited to ThinkCentral, GIZMOS, and Brainpop - computer-based programs will assist students visually in understanding science concepts.

Students will participate in weekly hands-on science investigations which will expose students to the scientific process and scientific thinking. Students will be encouraged to participate in Science

Labs and Science Fairs where they will be able to explore and investigate the steps to the scientific method. These activities will allow students to recognize the various roles that science plays in real life. The connection and application of science will motivate, give meaning to, and reinforce student learning.

- Science Fusion- Houghton Mifflin Harcourt created Science Fusion for Florida will be used for homework. Science Fusion provides a colorful collection of informational text along with many hands-on labs. Teachers and students are given access to ThinkCentral, which provides interactive labs for teachers and students. Students are also given the option to access ThinkCentral at home. Students in grades 6-8 may actively use Science Fusion and ThinkCentral.
 - Teachers will be encouraged to engage students through the use of a variety of strategies which include but will not be limited to the following:
 - Quantitative and qualitative observations
 - Investigation and contemplation of thoughtful questions
 - Inquiry-based labs and other types of investigations which lead to understanding of science concepts
 - Collection, organization and analysis of data
 - Formulation of logical predictions supported by investigation and observation (empirical data)
 - *Various assessment techniques which offer ample opportunities for students to learn how to effectively communicate both in written and oral formats will also be employed.

Resources such as the following may also be consulted in order to most effectively support lesson plan objectives:

- Florida Association of Science Teachers
- Science State Standardized Assessment Resources
- National Institute for Science Education
- National Science Teachers Association
- Technology: Including but not limited to, Safari Montage, GIZMOS, and BrainPop - computer-based programs will assist students visually in understanding science concepts.

Grades 6-8

At the completion of science coursework, students will have achieved a year's worth of learning by mastering, at minimum, the objectives and concepts aligned to the Next Generation Sunshine State Standards/Florida Standards for Science/Common Core Standards.

6th Grade

M/J Comp Science I

M/J Comp Science I Advanced

M/J Comp Science I Advanced Gifted-

2002050* M/J COMPRE SCI I ADV to meet the needs of advanced and gifted students. A modify to be added to include enrichment for students w/ EPs as needed

7th Grade

M/J Comp Science II

Earth Space Science Honors-
2001020* M/J EARTH/SPA SCI ADV to meet the needs of advanced students. A modifier to be added identify the course as honors

Earth Space Science Honors Gifted-
2001020* M/J EARTH/SPA SCI ADV to meet the needs of advanced and gifted students. A modifier to be added to include enrichment for students w/ EPs as needed

Physical Science Honors-
2003020* M/J PHY SCI ADV

Physical Science Honors Gifted-
2003020* M/J PHY SCI ADV to meet the needs of advanced and gifted students. A modifier to be added to include enrichment for students w/ EPs as needed

8th Grade

M/J Comp Science III

Physical Science

Physical Science Honors

Physical Science Honors Gifted

Biology I Honors

Biology I Honors Gifted-n

High School Course Credit 2000320* BIO 1 HON A modifier to be added to include enrichment for students w/ EPs as needed

*Senior High School Credit(s) for Students in Grades 6, 7, and 8. Students may enroll in selected senior high school courses for the purposes of pursuing a more challenging program of study; Students are required to adhere to End of Course requirements for Biology, as stated by the Florida Department of Education.

Social Studies

The Social Studies curriculum includes the study of related knowledge and modes of inquiry selected from history, the humanities, and the social sciences, including anthropology, archaeology, economics, geography, history, law, philosophy, political science, psychology, religion, and sociology. Social Studies education will promote loyalty and love of country and community, and it will prepare students to participate intelligently in public affairs. Its component disciplines foster in students the knowledge and skills needed to understand current political and social issues. Social studies education will provide students with an understanding of the democratic principles and ideals upon which good citizenship is founded and an understanding of the world beyond their borders. In replication of #5151, the comprehensive social studies program will:

- Emphasize content, concepts, and skills from the social sciences, the humanities, and, where appropriate, mathematics, and the natural sciences;
- Reflect a clear commitment to democratic beliefs and values;
- Encourage civic responsibility and active participation;
- Promote high expectations for all students;

- Incorporate a multicultural perspective;
- Reinforce the development of a global perspective;
- Promote understanding of social, political, and economic institutions;
- Encourage student involvement in community service;
- Focus on the identification of the potential solutions to local, national, and world problems;
- Involve students in their learning by using a variety of teaching strategies and instructional materials; and
- Promote an interdisciplinary approach to learning.

At the completion of the course, students will have achieved a year's worth of learning by mastering, at minimum, the objectives and concepts aligned to the State Standards to promote an overarching depth that encompasses speaking and listening, writing, reading, and language.

Character Education Instruction – Students will receive instruction in the core character education values (citizenship, cooperation, fairness, honesty, integrity, kindness, pursuit of excellence, respect, and responsibility). A character education program will be implemented that recognizes students possessing qualities such as cooperation, kindness, respect, honesty, self-control, responsibility and citizenship. This will be infused in the regular curriculum.

Social Science courses, in an effort to effectively mirror #5151, will utilize some combination of the following:

Civic in Practice
Ways of the World
World history: Journey Across Time
Holt McDougal United States History
America Past & Present Ap Edi.
The American Vision
American Politics Today
A History of Western Society
Economics, Today and Tomorrow
U.S Government, Democracy in Action
Sources of Western Society
Art History
Psychology
Civic in Practice
Journey Across Time
World Geography and Culture
Human Geo: Landscapes of Human Act
Human Geo: Landscapes of Human Geo
United States His. Beginnings to 1877
The American Vision
Economics
US Government

Mirroring Chapel Trail curriculum:

6th. Grade: World History: The study and analysis of the cultural traits of early humans, Mesopotamian civilizations, Ancient Egypt, Israelites, Judaism, Ancient Greece, Persia, the Roman Empire, the Byzantine Empire, the rise of Christianity, the Islamic civilization, Early India, Early China, African Civilizations, and Mesoamerican Civilizations

Textbook: Glencoe World History: Journey Across Time Textbook

7th. Grade: Civics: The study of the United States constitutional government development, structures, and functions of local, state, and national governments. The course includes the history and contemporary problems of Florida – rights, responsibilities, and obligations of citizens. Students completing this course will be required to take the State of Florida Civics End-of Course Exam. This exam score will equal 30% of their final grade.

Textbook: Holt McDougal: Civics in Practice textbook

8th. Grade: U.S. History: The study of American history from the Exploration and Colonization period to the Reconstruction Period following the Civil War following the historical, geographic, political, economic, and sociological events which influenced the development of the United States.

Textbook: Holt McDougal: United States History Beginnings to 1877

Across the department, the School will engage in planning lessons that contain the following components: Study Island Readings and Assessments; On-line educational websites; Edusoft Assessments for Civics; Economics and History Activities; cooperative learning activities, hands-on-activities, interdisciplinary connections, primary source readings, and enrichment activities.

A typical day in Social Studies will include the elements of a common board configuration, i.e. communication of learning goals, essential question, agenda/activities, and homework information. Teachers' individuality comes across the classroom. However, academic rigor is an important part of planning out lessons, as we develop critical thinking skills and increase the use of DOK questions, reading strategies, writing skills, self and peer correction, and a heavy focus on study skills/strategies.

An innovating lesson would include enrichment activities geared to interest and maintain students' engagement with the lesson at hand. In-house exhibits, in-house projects that include analyzing primary sources such as artifacts; using online resources to keep students interested and make social studies come alive; cooperative learning activities that encourage communication skills among; activities that simulate real life experiences such as linking past and present activities; and, the inclusion of activities that promote kinesthetic movement within the classroom as a way to promote experiences while decreasing passive participation and alienation.

Supplemental Material might include:

The School will use TCI (Teacher Curriculum Institute) as a supplement for all grades, all classes. Grade 6 may use *History Alive! The Ancient World*. Grade 7 may use *Government*

Alive! Civics, Geography and Economics. Grade 8 may use *History Alive! The United States Through Industrialism*. Grade 12 will use *Econ Alive! The Power to Choose*. TCI provides chapter by chapter correlations to the Florida Standards and NGSSS at all levels. The curriculum has a technology component, enrichments built in, remediation built in, and assessments aligned to state standards. The School may also use state-approved **Scott Foresman** text in the instruction of Social Studies. The Social Studies curriculum includes the study of related knowledge and modes of inquiry selected from history, the humanities, and the social sciences, including anthropology, archaeology, economics, geography, history, law, philosophy, political science, psychology, religion, and sociology.

Social Studies education will promote loyalty and love of country and community, and it will prepare students to participate intelligently in public affairs. Its component disciplines foster in students the knowledge and skills needed to understand current political and social issues. Social studies education will provide students with an understanding of the democratic principles and ideals upon which good citizenship is founded and an understanding of the world beyond their borders. The comprehensive social studies program will:

- Emphasize content, concepts, and skills from the social sciences, the humanities, and, where appropriate, mathematics, and the natural sciences;
- Reflect a clear commitment to democratic beliefs and values;
- Encourage civic responsibility and active participation;
- Promote high expectations for all students;
- Incorporate a multicultural perspective;
- Reinforce the development of a global perspective;
- Promote understanding of social, political, and economic institutions;
- Encourage student involvement in community service;
- Focus on the identification of the potential solutions to local, national, and world problems;
- Involve students in their learning by using a variety of teaching strategies and instructional materials; and
- Promote an interdisciplinary approach to learning.

Lessons will be designed to teach students to effectively analyze historical evidence, use sources effectively, detect potential bias in resources due to cultural influences, and argue empathetically. Thematic units will be designed that integrate the various subjects: Time, Continuity, and Change (History); People, Places, and Environments (Geography); Government and the Citizen (Civics and Government). Additionally, the School will include the following Social Studies topics in the Social Studies curriculum:

- African-American History Requirement
- Holocaust Requirement
- Hispanic Contributions to the United States Requirement
- Women's Contributions to the United States Requirement
- Veterans Contributions Recognition
- “Celebrate Freedom Week” Instruction - shall be in accordance with Florida Statutes.

The School plans to use state-adopted instructional materials, including digital software and multimedia in the instruction of Social Science.

Lessons will be designed to teach students to effectively analyze historical evidence, use sources effectively, detect potential bias in resources due to cultural influences, and argue empathetically. Additionally, the School will include the following **Required Topics of Study in the Social Sciences** curriculum:

1. African American history and culture

SS. 6.G.4.3 Locate sites in Africa and Asia where archaeologists have found evidence of early human societies, and trace their migration patterns to other parts of the world.

SS.8.A.2.7 Describe the contributions of key groups (Africans, Native Americans, women, and children) to the society and culture of colonial America.

SS.8.A.3.15 Examine this time period (1763-1815) from the perspective of historically under-represented groups (children, indentured servants, Native Americans, slaves, women, working class).

SS.8.A.4.4 Discuss the impact of westward expansion on cultural practices and migration patterns of Native American and African slave populations.

SS.8.A.5.8 Explain and evaluate the policies, practices, and consequences of Reconstruction (presidential and congressional reconstruction, Johnson's impeachment, Civil Rights Act of 1866, the 13th, 14th, and 15th Amendments, opposition of Southern whites to Reconstruction, accomplishments and failures of Radical Republicans

SS.8.E.2.1 Analyze contributions of entrepreneurs, inventors, and other key individuals from various gender, social, and ethnic backgrounds in the development of the United States economy.

SS.8.E.2.3 Assess the role of Africans and other minority groups in the economic development of the United States.

2. Hispanic contributions to the United States

SS.8.A.2.1 Compare the relationships among the British, French, Spanish, and Dutch in their struggle for colonization of North America.

SS.8.A.2.4 Discuss the impact of colonial settlement on Native American populations.

SS.8.A.4.1 Examine the causes, course, and consequences of United States westward expansion and its growing diplomatic assertiveness (War of 1812, Convention of 1818, Adams-Onis Treaty, Missouri Compromise, Monroe Doctrine, Trail of Tears, Texas annexation, Manifest Destiny, Oregon Territory, Mexican American War/Mexican

SS.8.A.4.18 Examine the experiences and perspectives of different ethnic, national, and religious groups in Florida, explaining their contributions to Florida's and America's society and culture during the Territorial Period.

SS.8.E.2.1 Analyze contributions of entrepreneurs, inventors, and other key individuals from various gender, social, and ethnic backgrounds in the development of the United States economy.

SS.8.E.2.3 Assess the role of Africans and other minority groups in the economic development of the United States.

3. Economic education

SS.6.E.1.1-->SS.6.E.3.4

SS.7.E.1.1--> SS.7.E.3.4

4. Multicultural education

Study of Other Cultures (SS.6.C.1.1--> SS.6.C.2.1)

SS.6.G.2.5. & SS.6.G.2.6 (Interpret how geographic boundaries invite or limit interaction with other regions and cultures. & Explain the concept of cultural diffusion, and identify the influences of different ancient cultures on one another.

SS.8.E.2.1 Analyze contributions of entrepreneurs, inventors, and other key individuals from various gender, social, and ethnic backgrounds in the development of the United States economy.

SS.8.A.3.10--> SS.8.A.3.12

5. Women's contributions to the United States

SS.8.A.2.7 Describe the contributions of key groups (Africans, Native Americans, women, and children) to the society and culture of colonial America.

SS.8.A.3.15 Examine this time period (1763-1815) from the perspective of historically under-represented groups (children, indentured servants, Native Americans, slaves, women, working class).

SS.8.A.4.14 Examine the causes, course, and consequences of the women's suffrage movement (1848 Seneca Falls Convention, Declaration of Sentiments).

SS.8.E.2.1 Analyze contributions of entrepreneurs, inventors, and other key individuals from various gender, social, and ethnic backgrounds in the development of the United States economy.

SS.8.E.2.3 Assess the role of Africans and other minority groups in the economic development of the United States.

8. Sacrifices made by veterans in protecting democratic values

SS.8.A.3.6 Examine the causes, course, and consequences of the American Revolution

SS.8.A.5.1 Explain the causes, course, and consequence of the Civil War (sectionalism, slavery, states' rights, balance of power in the Senate).

9. History and content of the Declaration of Independence and the U.S. Constitution

- Covered in all of 7th Grade Civics (SS.7.C.1.1 --> SS.7.C.4.3)

SS.8.C.1.1-->SS.8.C.2.1

SS.8.A.5.8 Explain and evaluate the policies, practices, and consequences of Reconstruction (presidential and congressional reconstruction, Johnson's impeachment, Civil Rights Act of 1866, the 13th, 14th, and 15th Amendments, opposition of Southern whites to Reconstruction, accomplishments and failures of Radical Republicans

At the completion of the course, students will have achieved a year's worth of learning by mastering, at minimum, the objectives and concepts aligned to the Florida Standards for Social Studies. The School will also use Newspapers as a literacy enrichment supplement and to incorporate data analysis daily by means of graphs and charts and sports-related statistics etc; and will integrate Reading and Writing strategies within the Social Studies Content using the Florida Standards Literacy Standards for Social Studies.

The School will follow the state course descriptions for the following courses to be offered in grades 6-8. These courses cover concepts and materials that are aligned to the NGSSS and/or Florida Standards, as adopted. Students will be required to successfully complete three credits of Social Studies at the Middle School level in Global Geography, Civics, and U.S. History.

6th Grade

M/J World History

M/J World History Advanced

M/J World History Advanced Gifted-

- * 2109020* M/J WORLD HIST ADV A modifier to be added to include enrichment for students w/ EPs as needed

7th Grade*

M/J Civics

M/J Civics Advanced

M/J Civics Advanced Gifted-

- 2106020* M/J CIVICS ADV A modifier to be added to include enrichment for students w/ EPs as needed

8th Grade

M/J US History

M/J US History Advanced

M/J US History Advanced Gifted-

- 2100020* M/J US HIST ADV A modifier to be added to include enrichment for students w/ EPs as needed

The school reserves the right to add additional courses/curriculum as needed based on student demand and enrollment.

Curriculum Delivery

The school will have the following processes in place to support the delivery of the curriculum:

Common Planning and Data-Driven Decision-Making

Somerset teachers will participate in common planning on a weekly. During common planning, teachers will work in grade-level or departmental groups. During these meetings, teachers will share best practices with the whole group, as well as within their grade level teams. Also, the grade level teams will disaggregate data to ensure that the curriculum is being adjusted to meet students' individual needs. Somerset curriculum coaches will assist with mini-lessons based on classroom observations and data disaggregation. These coaches provide training to teachers on the various researched based curriculum needs. Also, the coaches use information from the walkthroughs to assist teachers in specific areas of need. At each common planning meeting, the coaches provide the teachers with resources and strategies to use for instruction within their classrooms.

In addition, the following practices will be implemented at the School:

- continuous review of curriculum to ensure a year's worth of learning of all state benchmarks
- research-based instructional practices
- principal evaluation through weekly classroom walkthroughs (principal is expected to have strong awareness that all teachers are utilizing the best practices and implementing the instructional initiatives with fidelity)
- The School Improvement Plan (SIP) will be used as a quality assurance tool to ensure that the curriculum goals are being accomplished.
- assessment data to make instructional decisions and plan interventions
- weekly grade level and monthly staff meetings
- ongoing professional development workshops
- before and after-school tutoring for remediation and acceleration
- targeted interventions for struggling readers and students performing below grade level.
- integration of long-term thematic projects across the curriculum
- multiple ELL and ESE strategies across the curriculum
- focus on differentiated instruction for learning styles
- integration of technology across all major disciplines

Additionally, the following instructional techniques will be incorporated throughout the curriculum in order to maximize learning:

Target Tutoring – The School believes that each student has a distinctive learning style thus said School will use data driven instruction and remediation strategies to target each student's academic need through tailored instruction. Additionally, the School will utilize data to enrich instruction and accelerate learning for students showing potential in specific areas. The School will provide opportunities and tutoring sessions to teach either one individual student or a small "targeted" number with the same instructional needs or potential.

Differentiated and Standards-Based Instruction – Teachers will use differentiated instructional strategies that connect with individual students' learning needs. Teachers can target varied learners by providing enriching activities to high performing students and remediation to lower performing students to better meet their specific needs. Teachers will manage instructional time to meet the

standards while providing motivating, challenging, and meaningful experiences for students to receive and process information in ways that require differentiation of experience. These instructional practices will include:

Direct Instruction (lecturing/modeling): This technique will be used when teachers need to explain or demonstrate specific content and skills. Explicit, systematic instruction will be based on the NGSSS/Florida Standards. This instruction is structured and based on mastery learning. Frequent curriculum-based assessments help group students by ability, leading to further differentiated strategies, which identify students who require additional intervention.

Scaffolding: Based on the previously mentioned assessments, teachers will ascertain the current developmental skills of individual students and provide support structures to help students move to the next level. As the year goes on, students will become more adept at targeted skills and at directing their own learning, thus achieving a certain level of autonomy in the process.

Cooperative Learning: Teachers will guide small group learning sessions to increase communication and team-building skills. These teams of students will be divergently grouped according to ability, interest, background, etc.

Inquiry-Based Learning: Based on the Scientific Method, this student centered strategy will require students to conduct investigations independent of the teacher, unless otherwise directed or guided through the process of discovery. Teachers will use this strategy in developing critical thinking and problem solving skills. There will also be emphasis on developing 21st century learners through technology-based instruction via eBooks.

Information Processing Strategies - Teaching students "how to" process information is a key factor in teaching students how to strategically organize, store, retrieve, and apply information presented. Such strategies will include memorization, KWL, reciprocal teaching, graphic organizing, scaffolding, or webbing.

Academic Excellence and Leadership Development are at the heart of the School's educational philosophy. Accordingly, the School's intellectual focus centers on high academic and behavioral expectations for all students communicated through the Code of Excellence and Code of Student Conduct.

Home learning policy: The School expects that all teachers will grade, discuss, and comment on homework regularly. Attention will be given to both quality and quantity of home learning projects.

Horizontally and Vertically Aligned Instructional Teams: The School will use professional development throughout the school year to allow for common planning and teaching teams, both within grade levels and subject areas. Through professional development activities planned within the school calendar, teachers will have opportunities to reflect on best practices, discuss new research findings, review educational journals, and examine student's body of work. A leadership team will be in place to ensure that horizontal and vertical planning is effective. Such a culture makes it safe for teachers to share universal goals, confront what is and is not working, and transform their own thinking and practice.

Vertical Alignment (by department): Courses will be correctly aligned and teachers will be permitted common planning time by department. This will permit teachers to quickly assess what students mastered in the preceding grade and focus on building skills and knowledge. This will help teachers avoid unnecessary reviewing and re-teaching, which often consumes valuable teaching time.

Horizontal Alignment (by grade level): The School will align lessons to the NGSSS/Florida Standards as adopted, for each subject and grade level to address specific subject matter. Teachers will follow the same time lines and have common planning schedules. Such alignment is crucial in school systems dealing with state-mandated, standards-based assessments.

Teachers Developing Curriculum: Teachers will play an integral role in the development of core curriculum, maintaining - and exceeding - the highest expectations- in alignment with the NGSSS/Florida Standards. Curriculum development will reflect how best to present a core body of knowledge. Teacher participation in curriculum development will also serve to increase their “buy-in” to the pedagogical process

Changing Teacher Practices: The School will encourage teachers to be facilitators and providers of opportunities for learning, NOT merely providers of information. Using the differentiated instructional strategies described above, teachers will tailor their instruction and adjust the curriculum to students’ needs rather than expecting students to modify themselves to fit the curriculum.

Community Partnerships: Teachers, students, parents and the administration will work together with the Board to identify potential community partners for service learning and other community based initiatives at the School. Additionally the School will provide enrichment activities and community-based initiatives allowing students to interact in social settings with diverse individuals.

Parental Involvement enhances learning when a school encourages parents to stimulate their children's intellectual development. Parental “investment” in a student’s education is crucial to student success, as well as to the advancement of the School’s mission and vision. Parental involvement agreements will encourage parents to contribute volunteer hours to ensure their active participation in their child’s education. Parents will receive and sign a parent handbook that outlines the responsibilities they have for their child’s learning and behavior at school and at home. Parental involvement will also be encouraged through (Parent Teacher Student Organization) PTSO and other such school commitments. Home-based volunteer projects will be available to parents who are unable to volunteer on-site due to work or family constraints.

Middle School Parent Night Presentation: Provides parents and students of incoming sixth graders pertinent information regarding bell schedules, course selections, electives, guidance counselor services, etc.

Service Learning: Teachers will engage students in service learning projects that start in the classroom and extend beyond it, encouraging responsible, caring participation in the local environment and in the wider world. Service-learning activities will be embedded in academic

courses (English, Math, Science, Social Studies) to achieve the existing course objectives and to help students meet grade level standards.

Transition to Digital Instructional Materials - As per legislation, the State Board of Education is required to establish a Florida digital classrooms plan that establishes minimum protocols and parameters for the state and districts to meet statutory requirements and timelines for instruction, learning, assessments, and accountability. School districts are also required under the law to develop district digital classroom plans and are responsible for reviewing and approving digital classrooms plans for charter schools. Accordingly, the school has allocated funds in its projected budget for technology and digital instructional materials. The school commits to use digital state-adopted materials in accordance with the district's adoption and as approved by the district/state for use in 2015. The school will work with its board to adopt a Digital Instructional Materials Plan based on district-adopted materials. The plan will consider at minimum, those recommendations by the FLDOE work group which include but are not limited to:

- Establish programs to reach an ultimate goal of a 1:1 ratio of devices to students by lease or purchase (Bring Your Own Device BYOD Programs, lease programs, etc.)
- Examination of the appropriateness and uniformity of Bring Your Own Device options.
- Policies and specifications for minimum requirements for devices and digital content and internet safety
- Development of an appropriate digital curriculum first and then obtain the device which best delivers the curriculum.
- Using existing resources, including Virtual School content and vetted free digital materials (such as Kahn Academy lessons and CK-12 Foundation resources)
- Accommodations to create equal opportunity for all students to access instructional content, utilizing options such as: Assistance programs to help families that cannot currently afford internet service; and The loading of necessary resources on a student device for accessibility when an internet connection is unavailable.
- On-going differentiated professional development for educators, including administrators, ranging from teacher/administrator education programs to new teachers/administrators.
- Establishment of optimum infrastructure guidelines to support digital access*

The school will also ensure that network infrastructure will include both wired and wireless infrastructure to support the classrooms and meeting areas such as the media center, cafeteria and outside areas in order for the students to access the instructional resources across the entire school facility. Equipment such as access points, controllers, switches, routers, etc. will to be optimized and strategically planned to ensure proper connectivity for students and staff.

The School will be nonsectarian in its programs, admission policies, employment practices and operations. The School will adhere to all applicable provision of Federal law relating to the education of students with disabilities, including the Individuals with Disabilities Education Act; section 504 of the Rehabilitation Act of 1974; and Title II of the Americans with Disabilities Act of 1990. The School will adhere to all applicable provisions of Federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974.

- B. Describe the school's reading curriculum. Provide evidence that reading is a primary focus of the school and that there is a curriculum and set of strategies for students who are reading at grade level or higher and a separate curriculum and strategy for students reading below grade level. The reading curriculum must be consistent with effective teaching strategies and be grounded in scientifically-based reading research.*

The School will support the Just Read, Florida! initiative in assisting all students in becoming successful, independent, and comprehensive readers by adopting the St. Lucie County Comprehensive Research-Based Reading Plan (K-12 CRRP) in the instruction of Reading. The CRRP includes instructional content based on the five essential components of reading instruction: phonological awareness, phonics, fluency, vocabulary, and comprehension.

Intensive Reading: The ability to read fluently and comprehend fully is the underpinning of any successful individual, both in school and in life. All teachers at the school will be teachers of reading assuring that students are active and competent readers by assigning lessons which emphasize content text and explication of it through meaningful discussion, relevant activities and authentic assessments to assure understanding and mastery. Level 1 and level 2 students, as determined by state standardized testing, will meet all requirements for reading instruction. These students will be given further assessments to determine their reading difficulties and assigned to courses that follow the state/ district guidelines. In addition to meeting the state and district's requirements for level 1 and level 2 students, we will offer elective reading courses to students who are already proficient in reading. Students will have the opportunity to read material from a variety of sources and in a variety of delivery modes. The Rotational Instructional Model is the school's model for instructional delivery, while the curriculum will be the Hampton Brown National Geographic Edge Series, Level A for 6-7th grade, Level C for 8th, supplemented with Study Island. Students who are reading at or above grade level will participate in English courses utilizing The Official Pre-AP Springboard curriculum and strategies inherent to those curriculums. The intensive reading course will utilize the materials from the Edge series, while delivery of instruction will occur via the Rotational Instructional model supplemented with CRISS strategies and Study Island, an interactive, diagnostic, student-paced remedial reading software program. Reading teachers will be Reading Endorsed or hold a Masters of Reading per state requirements:

**6A-4.0291 Specialization Requirements for Certification in Reading (Grades K-12)--
Academic Class.**

- (1) Plan One. A master's or higher degree with a graduate major in reading, or
- (2) Plan Two. A bachelor's or higher degree with thirty (30) semester hours in reading to include the areas specified below:
 - (a) Six (6) semester hours in foundations of reading instruction to include the elementary and secondary levels,
 - (b) Six (6) semester hours in diagnosis of reading disabilities and techniques of corrective or remedial reading,
 - (c) Three (3) semester hours in educational measurement, (d) Three (3) semester hours in literature for children or adolescents,
 - (e) Three (3) semester hours in methods of teaching language arts at the elementary or secondary level,

- (f) Three (3) semester hours in administration and interpretation of instructional assessments with instructional strategies and materials based upon scientifically based reading research for the prevention and remediation of reading difficulties, and
- (g) Three (3) semester hours in a supervised reading practicum to obtain practical experience in increasing the reading performance of a student(s) with the prescription and utilization of appropriate strategies and materials based upon scientifically based reading research to address the prevention, identification, and intervention of reading difficulties.

**6A-4.0292 Specialization Requirements for the Reading Endorsement ---
Academic Class.**

- (1) A bachelor's or higher degree with certification in an academic, degreed vocational, administrative, or specialty class coverage, and
- (2) Fifteen (15) semester hours in reading coursework based upon scientifically based reading research with a focus on both the prevention and remediation of reading difficulties to include the areas specified below:
 - (a) Six (6) semester hours in understanding reading as a process of student engagement in both fluent decoding of words and construction of meaning;
 - (b) Three (3) semester hours in the administration and interpretation of instructional assessments to include screening, diagnosis, and progress monitoring with purposes of prevention, identification, and remediation of reading difficulties;
 - (c) Three (3) semester hours in understanding how to prescribe, differentiate instruction, and utilize appropriate strategies and materials based upon scientifically based reading research in order to address the prevention, identification, and remediation of reading difficulties in order to increase reading performance; and
 - (d) Three (3) semester hours in a supervised practicum to obtain practical experience in increasing the reading performance of a student(s) with the prescription and utilization of appropriate strategies and materials based upon scientifically based reading research to address the prevention, identification, and remediation of reading difficulties.

Reading is a critical portion of Florida's education system and the law requires it be a "primary focus" of all school curricula. To assist in efficiently using the time dedicated to making reading the primary focus of the curriculum, the following objectives from Florida's Reading Program Specifications will be practices implemented at the School:

- 3.2.1. Significant instructional time is dedicated to reading instruction.
- 3.2.2. Explicit systemic approach to instruction through skill scaffolding and monitoring of student learning gains.
- 3.2.3. Students actively engage in learning during instructional time.
- 3.3.3 Progress monitoring of skill acquisition will be periodically administered throughout the school year to detect and steer reading progress

The School will support the Just Read, Florida! initiative in assisting all students in becoming successful, independent, and comprehensive readers by adopting at minimum the St. Lucie County Comprehensive Research-Based Reading Plan to provide teachers with a systematic framework for literacy instruction. The School's text selection will be according to the state-adopted texts throughout the duration of the charter.

The reading program will cover the Florida's Formula for Reading Success 6 + 4 + ii + iii:

6 Areas of Reading -Oral Language, Phonemic Awareness, Phonics, Fluency, Vocabulary, Comprehension

4 Assessments –Screening, Progress Monitoring, Diagnosis, Outcome measures

ii: Initial Instruction –

- Minimum 90-minute reading block
- Incorporates 6 instructional components of effective reading instruction into a comprehensive and cohesive instructional design.
- use assessment data to plan for and provide instruction including
- Explicit instructional strategies
- Coordinated instructional sequences
- Print-rich instruction
- Whole group/small group/whole group
- All students, using differentiated instruction

iii: Immediate Intensive Intervention of the 90-minute reading block

- Small group or one-on-one
- Students with reading deficiencies
- Minimum of 20 minutes/day until deficiency is remedied

Print Rich Environment - Each class will maintain a classroom library to include a collection of quality literature that includes material written at varying reading levels and in a variety of genre forms, inclusive of both fiction and nonfiction. This collection will offer students reading material that will support their individual interests and abilities. Frequent successful reading experiences using appropriate texts will provide the opportunity to improve their reading proficiency with regard to fluency, vocabulary, and comprehension. The books in the classroom library will be attractively displayed to exhibit an inviting accessibility to all students. Teachers will organize classrooms to afford students ample opportunities for, and easy access to, reading materials during literacy center time within the daily reading block.

Word Walls - Teachers will create effective word walls that consist of high frequency words, word patterns or phonic elements, and interesting, exciting words. Students will use word wall during lessons and activities to practice recognizing words quickly and accurately.

Reading Stations - Reading stations will be set up throughout the room in various areas that allow students to work independently or in a small group setting, using instructional materials to explore and expand their literacy. During this time students are engaged in a variety of activities that reinforce and extend learning without the assistance of the classroom teacher. Students will practice reading, writing, speaking, listening, and working with letters and words. Manipulative such as magnetic letters and sound letter cards are used to increase active participation and provide additional guided practice through multi-sensory approaches.

Sustained Silent Reading - Increments of independent, sustained silent reading will be included in the reading classroom to help students build stamina for increasingly longer and more challenging text. Teachers must monitor for engagement. Reading logs, reaction journals, text talk, book passes or story summaries help students make connections to text.

Comprehensive Core Reading Program (CCRP)

The School will implement the state-approved *Comprehensive Research-Based Reading Plan (CRRP)*, as established by the FL-DOE in the instruction of Reading. The School will use the State approved text **National Geographic Hampton Brown Edge (Cengage) Levels A and B series as the Comprehensive Core Reading program in grades 6-8**. The School will use the program to instruct students on grade level and provide initial and differentiated reading instruction based on N-G SSS/Florida Standards. Since certain text and assessments are currently being modified, the School will adopt the plan in effect during the 2014-2015 school year. The School's text selection will be modified as per the State's selection of state-adopted texts and modifications throughout the duration of the charter.

Comprehensive Intervention Reading Programs (CIRP) - CIRP's are intended for students who are reading one or more years below grade level, and who are struggling with a broad range of reading skills. The instruction provided through these programs should accelerate growth in reading with the goal of returning students to grade level proficiency. This Intervention will provide more frequent assessments of student progress and more systematic review in order to ensure proper pacing of instruction and mastery of all instructional components.

Reading Strategies include:

- Reciprocal Teaching strategies to increase reading comprehension including predicting, clarifying, questioning, visualizing, and summarizing;
- QAR: four types of questions that include: right there, think and search, author and you, and on my own, to foster students' understanding of text, develop vocabulary, and build critical thinking.
- Differentiated Instruction and Grouping to accommodate varying reading levels and learning styles: 1) Whole-group instruction 2) Small-group instruction 3) Individual instruction 4) Independent reading

The school may use the following programs in providing targeted differentiated intervention support to meet the specific needs of struggling readers. The School may purchase or a variety of approved comprehensive intervention materials/programs such as, but not limited to:

- Study Island
- Scholastic Reading Inventory
- Reading Counts
- Reading Plus
- Voyager Passport Reading Journeys- 6-8

Supplemental Intervention Reading Programs (SIRP)

SIRP's will provide instruction that primarily focuses on one single essential component of reading (i.e., oral language, phonemic awareness, phonics, fluency, vocabulary, OR comprehension)

intended to extend beyond the initial instruction of a Comprehensive Core Reading Program (CCRP).

The School may use the following approved research-based programs:

Grades 6-8:

- Glencoe Reader
- Jamestown
- Read XL
- Wilson Reading System
- Achieve 3000

Additional Reading Supplements

•**Daily Five-** Daily Five is a structured literacy framework designed to help students develop the daily habits of reading, writing, and working with peers. The Daily Five incorporates the following strategies: Read to Self, Read to Someone, Listen to Reading, Work on Writing and Word Work. Through the use of Daily Five, the following core foundations emerge: trusting students, providing choice, nurturing community, creating a sense of urgency, building stamina and staying out of student's way once routines are established. Daily Five will lead to a lifetime of independent literacy.

•**Jan Richardson's Guided Reading-** Teachers are trained to incorporate Jan Richardson's Guided Reading plans into their daily small literacy groups. Teachers create literacy groups based on the results from the Developmental Reading Assessment (DRA). Jan Richardson's Guided Reading program provides specific skills and strategies for teachers to use for each lesson. These skills include: making words, picture sorts, elkonin boxes, analogy charts, and guided writing. Jan Richardson created lesson plans based on student's individual levels.

•**Reading Plus-** Reading Plus is a computer based program used by students in grades 3-8. Reading Plus monitors student's silent reading skills. The Florida State Standards are incorporated into the Reading Plus lessons. Reading Plus is a researched based program that has been proven to increase reading levels and test scores.

These supplemental materials provide teachers with tools to meet individual student learning needs during initial instruction and immediate intensive intervention and for Response to Intervention (RtI) based on results of assessments such as FAIR (as applicable), SRI, and Diagnostic Assessments of Reading (DAR).

Response to Intervention (RtI)- The RtI model is a multi-tiered approach to providing high quality instruction and intervention matched to student needs, using learning rate over time and level of performance to inform instructional decisions.

Embodied in each tiers are four steps:

Step 1-Identify the problem.

Step 2-Analyze the problem and determine why there is a discrepancy.

Step 3-Establish a performance goal for the student, develop an intervention plan to address the goal, and monitor the student's progress during implementation.

Step 4-Use research-based data, collected during the progress monitoring, to evaluate the effectiveness of the intervention. Once effectiveness has been evaluated, RtI team determines if additional intervention is needed and/or adjust the intervention to support student progress.

RtI Three Tier Model: Within the RtI structure, resources are aligned in direct proportion to student needs and are depicted into a three-tier model that used increasingly more intense instruction.

•**Tier 3: Intensive, Individualized Interventions Supports.** The most intense instruction and intervention based upon individual student need. During this stage, intervention frequency is increased and one to one support is provided as needed.

Tier III Intensive Individualized Interventions - Tier 3 intensive supports are intended for students who demonstrate more severe deficits and are not demonstrating a positive response to generally effective Tier 2 interventions. These students will require curriculum and instruction that is more explicit and intense. These interventions will be designed to meet individual student needs by identifying and targeting the specific skill deficits of the student. The goal is to accelerate a student's rate of learning by increasing the intensity of the intervention by increasing the frequency and duration of individualized interventions, by decreasing group size, or by increasing academic engagement. Intensive individualized interventions are usually delivered in groups of no more than three students. Ongoing-progress monitoring at Tier 3 will be completed more frequently than at the other two tiers and will be aligned to the type and level of the intervention provided. State-standardized assessment data (SAT-10, FAIR-FS, In-Program Assessments, ELL and IEP plans will also be considered when selecting the appropriate interventions).

•**Tier 2: Targeted, Supplemental Interventions Supports.** More targeted instruction/intervention in addition to supplemental support, in addition to differentiated/small group instruction. Identified students will receive a minimum of 20 additional minutes of instruction to provide instructional support.

(iii) Immediate Intensive Interventions - Tier II Supplemental Interventions - Students whose literacy development is determined to be at risk or who are not progressing in the core curriculum, will continue to receive strong core instruction and additional supplemental interventions at Tier II. Students will be scheduled to attend small group immediate intensive intervention for a minimum of 30 minutes daily in addition to the 90-minute reading block during the regular school day. The intervention program is designed to meet the specific diagnosed needs of each individual student. Teachers will group students according to need and place students appropriately within the intervention program/levels. These interventions are provided to students who are not achieving the desired standards through the core curriculum alone. Tier II is provided in addition to Tier I. That is, the interventions that are selected are provided in addition to core instruction (30 minutes outside the reading 90-minute reading block is allocated for Tier II Supplemental Interventions). At Tier II, ongoing progress monitoring involves reviewing group data, or data of the student's

performance (formative & outcome data) at both Tiers I & II. State Standardized Assessment data (SAT-10, FAIR-FS, In-Program Assessments, ELL and IEP plans will be considered when selecting the appropriate interventions). Classroom infrastructure will have appropriate and adequate CIRP and SIRP materials to address the learners' needs.

Ongoing Progress Monitoring (OPM) data (using FAIR-FS, Easy CBM, Wonders Works and other in-program assessments will be used to modify the intervention schedules and strategies as well as to monitor fidelity of implementation. Ongoing-progress monitoring is done more frequently at Tier 2 than Tier 1 as determined by the problem solving/PS team. Data gathered through Tier 2 ongoing-progress monitoring allows the PS team to determine if any changes need to be made to the group's intervention plan or to identify individual students who continue to struggle despite Tier 1 & 2 supports. Using Response to Intervention (RtI) model, students will receive additional small group instruction that focuses on the reading skills/strategies based on the week's instruction and strategies using Tier 2 instruction promoted within the Reading Wonders curriculum. At Tier 2, ongoing progress monitoring involves reviewing group data, or data of the student's performance (formative & outcome data) at both Tiers 1 & 2.

•**Tier 1: Core, Universal Instruction Supports:** General academic instruction and support is provided to all students in all settings.

Tier I Core Instruction - Teachers will match students' prerequisite skills with course content to create an appropriate instructional match using evidence-based instructional strategies with fidelity. The Sponsor's Comprehensive Research-Based Reading Plan (CRRP) clearly indicates that the reading block will include whole group instruction using the comprehensive core reading program and small group differentiated instruction in order to meet individual student needs. Teachers will be expected to teach reading to all students using the CCRP that is on the level of the majority of children in the class. An initial lesson from the CCRP usually consists of 30-40 minutes per day of the required 90-minute uninterrupted reading block (the 90 minutes is a minimum time required). For the remainder of the block, the teacher will differentiate instruction focusing on the need of students using the CCRP or Supplemental Programs (Ticket to Read/Reading Plus). In addition to the 90-plus minutes, the classroom teacher, special education teacher, or reading coach will provide immediate intensive intervention to students in need as determined by assessment data.

The School will use the Core reading program for to instruct students on grade level and provide initial and differentiated reading instruction based on needs of students. Students identified by FAIR-FS assessments as struggling readers will be placed in an appropriate intervention program. The small-group, teacher-led center during the 90-minute reading block is the initial provision of intervention. Highly-qualified teachers plan and deliver intervention instruction designed to target specific student needs including explicit instruction on specific skills and the application of these skills in scaffolded, guided-reading lessons, using text at the students' instructional level and progressing to more complex text. These Differentiated Instructional strategies will allow teachers to meet the demands of the differing learning abilities in the same class. For optimal instruction, students will be grouped in various ways and in flexible setting to accommodate varying reading levels and learning styles. Teachers will utilize the methods of whole-group instruction, small-group instruction, individual instruction, and independent reading to address various needs

Middle School Reading Courses - The skills and strategies taught align with Florida Standards for ELA/Reading at the appropriate grade level, specifically those benchmarks that are assessed in Reading. Reading strategies in the content areas are to be provided to students in all grades in the middle schools. These strategies should be in addition to those taught during language arts classes.

Middle school students who scored at Level 1 or Level 2 Reading and have intervention needs in the areas of decoding and/or fluency will have an extended block of reading intervention. This may occur through a double block of intensive reading or by blocking together a class of "Intensive Reading" with another subject area class. The intensive reading courses include:

- M/J Intensive Reading
- M/J Intensive Reading Plus
- Developmental Language Arts through ESOL (for ELL)

The Reading Leadership Team - The school will establish a Reading Leadership Team to collaboratively oversee the implementation of the CRRP, and monitor the use of instructional materials related to reading instruction, data analysis, professional development, and technology.

The Reading Leadership Team may be comprised of the Principal, Assistant Principal of Curriculum, Reading Coach, Media Specialist, ESE Teacher, ELL Coordinator, Testing Chair, Department Chairs, and Reading Teachers. The administrative team will conduct classroom visitations, monitor lesson plans and ensure that reading strategies are implemented across the curriculum. Reading coordinators will support teachers needing assistance. In addition, all faculty members must address strategies for reading instruction in their annual Deliberate Practice Plan (DPP). These strategies must be constantly updated based on the results and analysis of progress monitoring in reading.

The Reading Leadership Team will meet on a regular basis to:

- Review the school's implementation of the reading plan;
- Assess the professional development needs of staff related to reading instruction based on student performance data; and
- Develop an action plan that addresses curricular and professional development needs as they relate to the implementation of the reading plan.

Reading Coaches will analyze progress-monitoring data on a quarterly basis. As student data are collected and analyzed, these data will be used to identify specific areas in which teachers can benefit from additional professional development opportunities. Assessment data will indicate areas where improvement is needed in instructional methods, practices and necessary interventions, thereby allowing for laser-focused professional development (including site-based modeling and coaching).

Screening and Progress Monitoring- Assessments will be used to (1) monitor students progress in reading as well as mathematics, and science sunshine state standards; (2) Provide teachers with classroom assessment tools that will provide student-level benchmarks; and (3) Provide students with information on their progress on specific benchmarks. The assessments include but are not limited to:

•**FAIR**- Florida Assessment for Instruction in Reading (FAIR) test is given to students in grades K-8. The data from the FAIR is used to assist student placement in reading groups based on their individual area of needs.

•**Baseline Test**- Baseline tests are created using the standards and benchmarks for each grade level. Teachers will administer these tests in August, November and the last assessment will be given in May. The data collected from the baseline test is used to determine the benchmarks which the students need to master.

•**State Standardized Assessment for Reading**

Screening: Students will be screened using the Florida Assessments for Instruction in Reading (FAIR), Scholastic Reading Inventory to determine Lexile levels, or any assessment mandated by the Sponsor's CRRP and DAR.

Progress Monitoring: Students will be progress monitored using the Florida Assessments for Instruction in Reading (FAIR), Scholastic Reading Inventory (SRI), Florida Oral Reading Fluency (FORF), or the Diagnostic Assessments of Reading (DAR).

For ELL's - CELLA (administered each spring to all current ELL students to measure proficiency and gains in reading, writing, listening, and speaking). Teachers will keep data portfolios, or folders, of student assessment results and progress in their classrooms to provide additional data of student progress for district and school-based monitoring.

Outcome Measures: State-Adopted Assessment/ FAIR

Approved accommodations will be provided as appropriate and data collected from these assessments will be used to determine readiness.

Data Collection and Analysis: The school will compile progress-monitoring data on a quarterly basis (or when available) and will disaggregate the results. Classroom instruction will be designed to address the deficiencies shown by data analysis and progress monitoring (incorporating classroom- assessment) will be used to measure effectiveness of such.

The Home Connection – The School believes learning continues beyond the classroom. For that reason, in addition to the efficient use of classroom time, the following objective from Florida's *Reading Program Specifications* will be a practice implemented at the school:

Collaborative and coordinated efforts within the school and between the school and home. Homework assigned will reinforce reading skills taught in the classroom. In addition, the School will promote parental and family involvement in teaching and encouraging reading, encourage family literacy practices, and communicate information regarding students' reading progress to parents. The idea encouraged will be that reading should take place in the home as well as in the classroom, and parents will be encouraged to read with their children whenever possible.

The school's reading program offers a multi-tiered system of supports, including data-based

problem-solving, utilizing student-centered RtI/MTSS data to make educational decisions. Other supports to ensure meeting the need of all types of readers, include 1) providing effective core instruction for all students; 2) administering high quality assessments to monitor progress and identify students and systems in need of intervention; 3) instructional use of a wide variety of complex texts to challenge student vocabulary and comprehension learning; and, 4) designing and implementing interventions that are matched to student needs.

Print Rich Environments - Each class will maintain a classroom library to include a collection of quality literature that includes material written at varying reading levels and in a variety of genre forms, inclusive of both fiction and nonfiction. This collection will offer students reading material that will support their individual interests and abilities. Frequent successful reading experiences using appropriate texts will provide the opportunity to improve their reading proficiency with regard to fluency, vocabulary, and comprehension. The books in the classroom library will be attractively displayed to exhibit an inviting accessibility to all students. Teachers will organize classrooms to afford students ample opportunities for, and easy access to, reading materials during literacy center time within the daily reading block. Classrooms will also maintain effective word walls that consist of high frequency words, word patterns or phonic elements, and interesting, exciting words. Students will use word wall during lessons and activities to practice recognizing words quickly and accurately.

Example: 90 minute Reading Block with Additional Time for Immediate Intensive Intervention (iii)							
Instruction	Possible Time	Class Configuration					Examples of Teacher-Led Instruction
90 minutes daily	30-45 minutes	Whole Group					Implement Comprehensive Core Reading Program (CCRP)
							Phonemic Awareness: <ul style="list-style-type: none"> Blending & Segmenting word parts & sounds in words Phonics & Fluency: <ul style="list-style-type: none"> Letter-sound correspondence Blending words Choral reading decodable book Vocabulary & Comprehension: <ul style="list-style-type: none"> Robust vocabulary instruction Pre-reading strategies During reading strategies Postreading strategies
	45-60 minutes	Differentiated Instruction - Small Groups (Group 1 - 4 th)					Implement CCRP resources and supplemental materials/programs
		*15 minutes for each group	M	T	W	Th	F
	Session 1 (15 min)	1	1	1	1	1	Group 2: word building with letters & pocket chart, read decodable book including words built. Culminating with fluent reading of decodable text without teacher support.
	Session 2 (15 min)	2	2	2	2	2	Group 3: read decodable book practicing blending words introduced in whole group, and fluent reading. Culminating with shared reading related to theme on the students' instructional level focusing on blending words, vocabulary, and use of comprehension strategies modeled in whole group.

(4) Types of Assessment to Guide Instruction

1. **Screening:** Screening assessments will be used to identify students who need additional instruction. Students will be screened using the Florida Assessments for Instruction in Reading (FAIR-FS, SAT-10) or any assessment mandated by the Sponsor's CRRP. The **Florida Kindergarten Readiness Screener (FLKRS)** –given to Kindergarteners will determine overall development and to specifically address the readiness of each student for Kindergarten based on the Florida Early Learning and Developmental Standards-for-Four-Year-Olds.
2. **Progress Monitoring:** The School will use the progress monitoring tools designated by the Sponsor's CRRP for 2015. Assessments will be used to monitor students progress, to provide teachers with classroom assessment tools that will provide student-level benchmarks; and to provide students with information on their progress on specific benchmarks. The assessments include but are not limited to: FAIR-FS, SAT-10, Interim Assessments, Internal Program Assessments (Wonders/Reading Plus), CELLA for ELL's etc.
3. **Diagnosis** to determine their specific instructional needs – FAIR-FS
4. **Outcome Measures** to guide instruction (**Florida Standards Assessment (FSA)** as adopted, FAIR-FS, SAT-10)

Data Collection and Analysis: The school will compile progress-monitoring data on a quarterly basis (or when available) and will disaggregate the results. Classroom instruction will be designed to address the deficiencies shown by data analysis and progress monitoring (incorporating classroom- assessment) will be used to measure effectiveness of such. Homework assigned will reinforce reading skills taught in the classroom. Teachers will keep data portfolios, or folders, of student assessment results and progress in their classrooms to provide additional data of student progress for district and school-based monitoring.

Reading Coach – The Reading Coach will assist to maintain and implement the school's reading program, supplemental reading programs, and to ensure high-fidelity implementation of reading instruction. Examples include: modeling effective strategies for teachers, providing professional development, differentiated instruction, monitoring progress, and analyzing student data. As student data are collected and analyzed, these data will be used to identify specific areas in which teachers can benefit from additional professional development opportunities. Assessment data will indicate areas where improvement is needed in instructional methods, practices and necessary interventions, thereby allowing for laser-focused professional development (including site-based modeling and coaching).

The Literacy Leadership Team (LTT): The school will establish a Literacy Leadership Team, with the purpose of creating capacity of reading knowledge within the school building and focusing on areas of literacy concern across the school. The principal selects team members based on a cross section of the faculty and administrative team that represents highly qualified professionals who are interested in serving to improve literacy instruction across the curriculum. The team will meet monthly throughout the school year or may choose to meet more often. The LTT maintains a connection to the school's RtI process by using the RtI problem solving approach to ensure that a multi-tiered system of reading support is present and effective. The principal, reading coach, mentor reading teachers, content area teachers, will serve on this team.

The Literacy Leadership Team will meet monthly to:

- Meet to discuss and disaggregate student data;
- Review, plan and assess the professional development needs of staff related to reading instruction based on student performance data;
- Develop an action plan that addresses curricular and professional development needs as they are related to the implementation of the reading plan; and
- Plan and promote school-wide literacy events, among other things.

The principal will actively promote school-wide literacy reform by:

- Including representation from all curricular areas on the LLT;
- Selecting team members who are skilled and committed to improving literacy;
- Offering professional growth opportunities for team members;
- Increasing a collaborative environment that fosters sharing and learning;
- Developing a school-wide organizational model that supports literacy instruction in all classes;
- Encouraging the use of data to improve teaching and thus impact student achievement.

Administrative Support - The administrative team and LLT members will conduct classroom visitations, monitor lesson plans and ensure that reading strategies are implemented across the curriculum. Intensive Reading teachers will be certified, Reading endorsed, or working towards said endorsement by completing at least two courses of the six reading endorsement competencies per year. Administrator will identify teachers in need of support and provide assistance through reading coaches, veteran teachers and the LLT members. English/Language Arts Department Chairs and/or Reading Coaches, when applicable, will analyze progress-monitoring data on a quarterly basis. As student data is collected and analyzed, these will be used to identify specific areas in which teachers can benefit from additional professional development opportunities. Assessment data will indicate areas where improvement is needed in instructional methods, practices and necessary interventions, thereby allowing for focused professional development (including site-based modeling and coaching).

Professional Development - The Reading Coach, in conjunction with the Reading Leadership Team, will design workshops to address the needs of classroom instruction. The Reading Coach will meet with the reading committee and grade levels/departments to review these results and share best practices. For further intensification, demonstration lessons, in-class coaching, peer observation and additional professional development opportunities will be made available to the faculty.

The reading team will also provide classroom support and on-site teacher professional development in utilizing reading intervention programs. In addition to providing classroom support seminars, the school will participate in a series of instructional workshops to actively engage students:

- Differentiated Instruction (3 suggested sessions)
- Content-Area Classroom Libraries (1 suggested session)
- Vocabulary Strategies/ Word Walls (1 suggested session)
- Reciprocal Teaching (3 suggested sessions)

In addition, the School will promote parental and family involvement in teaching and encouraging reading, encourage family literacy practices, and communicate information regarding students' reading progress to parents. The idea encouraged will be that reading should take place in the home as well as in the classroom and parents will be encouraged to read with their children whenever possible.

C. Describe proposed curriculum areas to be included other than the core academic areas.

The proposed curriculum areas beyond the core academic areas that the charter school may be implementing are of the following:

Health, Physical Education, and Safety - The Physical Education courses impart knowledge, offer group experiences, teach the joy of effort and achievement, and build lasting recreational interests. The health and safety competencies will focus on educating students to develop habits of health that contribute to the continued good functioning of the body. The P.E. program will consist of a standards based, balanced, sequential and progressive program-involving moderate to vigorous physical activity. It always strives to be in step with the current practices and procedures in education and to contribute to the all-around development and education of students. This course also focuses on Health. Students are taught not to take their health for granted, but rather to develop habits of health that contribute to the continued good functioning of the body. The School will be designated a "Drug Free School Zone" and a smoke-free worksite.

The health competencies will focus on educating students to develop habits of health that contribute to the continued good functioning of the body. The School will have a strong "Say No to Drugs" campaign and prevention curriculum which will be highlighted by units of study that focus on substance abuse across the grade levels and by Red Ribbon Week.

In addition, the following Topics of Study will be taught as part of the curriculum:

1. Substance abuse education
2. Human growth and development (including HIV/AIDS education)
3. Child abuse prevention education
4. Gun safety
5. Bullying Curriculum
6. Sexting Curriculum
7. Internet Safety

P.E. - In accordance with the "*Don Davis Physical Education Act*," the equivalent of one class period per day of physical education for one semester of each year is required. This requirement shall be waived for a student who meets one of the following criteria:

- the student is enrolled or required to enroll in a remedial course;
- the student's parent indicates in writing to the school that:
 1. The parent requests that the student enroll in another course from among those courses offered as options by the school district; i.e. art, music, language, etc. OR
 2. The student is participating in physical activities outside the school day, which are equal to or in excess of the mandated requirement; i.e. after school sports, dance classes, physical activity as part of an after school program, etc.

Physical Education Possibilities
M/J Comprehensive PE I
M/J Comp PE II
M/J Comp PE III
M/J Dance I
M/J Dance II
M/J Dance III

World Language - The School recognizes that there is a growing international interdependence among nations, which demands that the United States develop citizens with a sound understanding of international and cross-cultural issues and the ability to communicate in more than one language. The School intends to develop students' understanding of international and cross-cultural issues as well as their ability to communicate in more than one language. Thus, the school will implement Spanish as a foreign language program for both non-speaking and Spanish-speaking students. Moreover, the school will offer French, as a foreign language, based on the needs of the school's learning community.

Mirroring Chapel Trail, a typical day in a language classroom will involve music, speaking in the target language, direct instruction for the grammar lesson, and group work. Similar to Chapel Trail, an innovative lesson might include music or film. For example, in the French classes the teacher will use a music video every day, which is used to study oral comprehension, grammar, and fluency. In upper level classes, the students teach the music video to their classmates and conclude the lesson with karaoke which builds their confidence, fluency and pronunciation.

Foreign Language Options
M/J Spanish, Beginning (Non-Speakers)
M/J Spanish, Intermediate (Non-Speakers)
M/J Spanish, Advanced (Non-Speakers)
Spanish for Spanish Sp Beginning
Spanish for Spanish Sp Intermediate
Spanish for Spanish Sp Advanced
Spanish for Spanish Sp I (High School Credit)
Spanish I (Non Speakers) (High School Credit)
French I
French II

Other Possible Electives:

Music –The music curriculum includes both vocal and instrumental music. Following the Next Generation Sunshine State Standards and/or Florida State Standards as adopted, specialists will introduce students to both skills and knowledge of various genres. Skills and techniques will be developed throughout all grade levels and will focus on music instruction in skills and techniques involved in singing and playing instruments, practice in musical interpretation, and training in creative expression.

Art –the primary goal in art education is to provide all students an opportunity to develop and explore their creative potentials. The Art curriculum includes planning, developing, and implementing the fine arts as outlined in the Next Generation Sunshine State Standards and/or Florida State Standard, as adopted. Students will be exposed to the many components of art including production, history, criticism and aesthetics. Moreover, the School will emphasize the interdisciplinary connections between Art and the core subjects. Authentic assessment is one of the focal points of the curriculum and will be implemented through a series of community based art experiences, festivals and art exhibitions.

There may be two annual elective courses at each grade level. For ELL students' only one elective course is allowed since the second elective is the required M/J Developmental Language Arts through ESOL. The School may establish appropriate requirements greater than prescribed district requirements, subject to the approval of the Governing Board.

Grades 6-8 - There will be two annual elective courses at each grade level. For ELL students' only one elective course is allowed since the second elective is the required M/J Developmental Language Arts through ESOL. The School may establish appropriate requirements greater than prescribed district requirements, subject to the approval of the Governing Board.

COURSE TITLE POSSIBLE OPTIONS	GRADE LEVEL
Computer Application in Business I	7-8
Computer Application in Business 2	7-8
Business Leadership Skills	7-8
Business Keyboarding	7-8
Personal, Career, and School Development Skills 1	8
Business Keyboarding & Career Planning	8
M/J Art/Art Appreciation 1	7-8
M/J Art/Art Appreciation 2	7-8
M/J Band I	7-8
M/J Band II	7-8
M/J Music Ensemble I	7-8

M/J Chorus I	7-8
M/J Chorus II	7-8
M/J Dance I	7-8
M/J Dance II	7-8
M/J Drama I	7-8
M/J Drama II	7-8
M/J Guitar I	7-8
M/J Guitar II	7-8
M/J Keyboard I	7-8
M/J Keyboard II	7-8
M/J Journalism I (Newspaper)	7-8
M/J Journalism I (Yearbook)	7-8
M/J Journalism II (Newspaper)	7-8
M/J Journalism II (Yearbook)	7-8

D. Describe how the effectiveness of the curriculum will be evaluated.

The effectiveness of the curriculum will be measured by the student achievement of the specific measurable (described in *Section 5* below). Expectations are that students will progress as well or better than they did before attending the charter school, and that the specific measurable objectives for the school are achieved from year to year. In years two and beyond, effectiveness of the curriculum will be evaluated based on achievement of the objectives in the School Improvement Plan, as required, wherein students will be expected to make annual learning gains toward achieving the State Standards, as adopted.

Ongoing monitoring and analysis of school-wide assessment data (as described in *Section 5* below) will assist the School in determining staff development needs, curriculum realignments, and the objectives submitted in the School Improvement Plan (SIP), as required. Student outcomes on standardized and school-wide assessments, benchmark tests and quizzes, projects, presentations, exhibitions, and portfolios will help in assessing the effectiveness of the curriculum throughout the school year. Ongoing internal audits of student progress, such as progress reports, report cards, beginning year, mid-year, and end-year assessments will be utilized as tools to evaluate whether the curriculum is effective and meeting the needs of all students.

Additionally, the School's commitment to continuous improvement and adherence to the AdvancEd quality standards (as an AdvancEd *Southern Association of Colleges and Schools Council on Accreditation and School Improvement (SACS/CASI)* accredited school under the

Somerset Corporate School System umbrella) is required since inception. Under the Somerset Corporate School System Umbrella, it is required that all Somerset schools implement, with fidelity, the programs and expectations under which all other existing Somerset schools were accredited; as a condition for the entity to maintain their status as an accredited corporate school system. As a Somerset school, the School will be closely and consistently monitored by the governing board, through the president, and the School will annually report on their progress and observance of specific parameters and guidelines set by the Accrediting agency. The ongoing continuous improvement process through SACS CASI, provides for reflection and the development of action plans for all school areas with special emphasis on academic standing and school climate concerns of all stakeholders (student, parent, and community).

The effectiveness of specific curricular areas may be evaluated with a rubric designed to measure the quality of learning as demonstrated through the culminating projects, aligned with Florida Standards, as adopted.

The effectiveness of the curriculum will be evaluated on a regular basis.

The Principal will bear primary responsibility for evaluating the standards in terms of rigor and alignment with the state frameworks, and for evaluating a teacher's success in bringing students to meet these standards. She will conduct these evaluations through frequent classroom observations and detailed analyses of aggregated and disaggregated assessment data.

The effectiveness of the curriculum and the implementation thereof will be reflected in the state standardized assessment data, end of course exams, quarterly standardized testing data, and teacher made test data, as they align with the Standards, pacing guides and curriculum frameworks. Test scores and data, achievement and growth will be a direct reflection of the success and effectiveness of the curriculum. The results of the data will determine the needs of not only the students, but the teachers, as well. The data will dictate the area of need for professional developments for teachers. Monthly professional development opportunities at faculty meetings or designated half-days will also frequently focus on curriculum development, providing teachers with the opportunity to speak with outside experts or to collaborate with one another on curricular refinements. Teachers will be provided with stipends to attend professional development trainings outside of school during the school year and during summer vacation, as the occasion or situation provides. Teachers may also visit other schools.

Baseline student academic achievement levels for the school will be established using multiple measures of student performance including data from school, district, and state measures. Each year, baseline data will be established and used to determine annual growth by the students individually and also collectively informing stakeholders to the extent to which educational goals and performance standards have been met by the School. The baseline levels of academic achievement established during the first academic year will be compared to academic achievement levels in prior years. Student performance and achievement results will be compared to the academic progress of the same students from quarter to quarter and from year to year as a means to determine students are continuously improving and making learning gains. The school will use this data to evaluate the effectiveness of the curriculum by determining the extent to which the School meets the Annual Measurable Objectives (AMO) set for the first year of operation (see *-Section 5 - Student Performance, Assessment and Evaluation*) and with consideration that changes will need to occur as the State solidifies plans for evaluating student mastery of the Florida Standards (FSA or other assessment selected).

In subsequent years, the results will be gauged against the AMOs specified in the respective Annual School Improvement Plan and this method of goal setting and data collection will be used as a living and continuous improvement tool.

All Curriculum Research and White Pages can be found in Appendix G.

Section 5: Student Performance, Assessment and Evaluation

- A. *State the school's educational goals and objectives for improving student achievement. Indicate how much academic improvement students are expected to show each year, how student progress and performance will be evaluated, and the specific results to be attained.*

2017 Objectives K-12

The School will establish educational goals for improving student achievement through Annual Measurable Objectives (AMO) that aim to increase student proficiency from year to year and are competitive with district/state achievement targets. At the time of this charter school petition submission, the data results for the state-mandated Florida Standards Assessment had not yet been released and therefore the specific absolute threshold of proficiency for schools and school districts alike, remain unknown. Due to these changes in legislation and state-mandated testing in ELA and Mathematics, the specific thresholds have not yet been released by the FLDOE. The school commits to implement and address absolute thresholds for all state/district assessments on actual baseline data, once available.

At minimum, the school has set the following Annual Measurable Objectives for Testing Year 1 (2016-17):

ELA:

- The school will meet or exceed the District and/or State average (whichever is higher) of students in grades 6-8 meeting high standards in ELA, as evidenced by scoring proficient or higher on the Florida Standards Assessment (FSA) in ELA in 2017 as established by FL-DOE.

Mathematics

- The school will also meet or exceed the District and/or State average (whichever is higher) of students in grades 6-8 meeting high standards in Mathematics, as evidenced by scoring proficient or higher on the new Florida Standards Assessment (FSA) in Mathematics in 2017 as established by FL-DOE.
- The school will meet or exceed the District and/or State average (whichever is higher) of Algebra 1 students who achieve a passing score on the Algebra 1 EOC, in 2017 as established by FL-DOE.
- The school will meet or exceed the District and/or State average (whichever is higher) of Geometry students who achieve a passing score on the Geometry EOC, in 2017, as established by FL-DOE.
- The school will meet or exceed the District and/or State average (whichever is higher) of Algebra 2 students who achieve a passing score on the Algebra 2 EOC, in 2017 as established by FL-DOE.

Science

- At least 50% of students in grade 8 will meet high standards in Science, as evidenced by earning a score of 3 or higher on the Florida Comprehensive Assessment Test of Science 2.0 to be administered in 2017. (This objective was projected using the current available

statewide and district-wide achievement data (43% pass rate) for Science FCAT 2.0 1 to calculate the target for 2017).

- At least 60% of students enrolled Biology 1 will demonstrate proficiency by earning a passing score on the 2017 Biology 1 EOC. (This objective was projected using the current available statewide and district-wide achievement data (58% pas rate) for the 2015 Biology 1 EOC to calculate the target for 2017).

Social Studies

- At least 65% of students enrolled in Civics will demonstrate proficiency as evidenced by earning a passing score on the 2016-17 Civics EOC Assessment. (This objective was projected using the current available statewide and district-wide achievement data (60% pass rate) for the 2015 Civics EOC to calculate the AMO target for 2017).
- At least 60% of students enrolled in US History will demonstrate proficiency as evidenced by earning a passing score on the 2017 EOC Assessment. (This objective was projected using the current available statewide and district-wide achievement data (58% pass rate) for the 2015 US History EOC to calculate the AMO target for 2017).

Program-related Objectives

- At least 80% of parents/guardians of students enrolled at the school will indicate a high level of satisfaction with their child's schooling experience as evidenced by positive feedback on Stakeholder Satisfaction Survey administered in the second semester of the 2017 school year.

Learning Gains

- Given school-wide instruction for Mastery of Language Arts Florida Standards (LAFS), at least 72% of the lowest quartile of students in grades 6-8 will make learning gains in ELA, as measured by the Florida Standards Assessment (FSA), or any other state standardized assessment, as adopted, in ELA to be established by FLDOE in 2016-17.
- Given school-wide instruction for Mastery of Mathematics Florida Standards (MAFS), at least 70% of the lowest quartile of students in grade 6-8 will make learning gains in mathematics, as measured by the Florida Standards Assessments (FSA), or any other state standardized assessment, as adopted, in Mathematics to be established by FLDOE in 2016-17.

All Students are expected to make annual learning gains toward achieving the Florida Standards as assessed by teacher-made internal pre and post testing in each core course in 2016-16. Due to changes in legislation and state-mandated testing in ELA and Mathematics, the specific thresholds have not yet been determined by the FLDOE for 2016. The school may set an absolute AMO targets for annual learning gains as expected to be established by the FL-DOE in 2017.

Misc:

- The school will increase the number of academically rigorous courses (advanced, honors, etc) by a minimum of 4 courses annually beginning in year 2 until capacity is met.

- Given school-wide emphasis on instruction for mastery of the Florida Standards at least 95% of students will participate in Florida's Statewide Assessment Program, as applicable.

The school will participate in the statewide assessment program created under s1008.22, Florida Statutes. As per the Student Success Act, school districts will be expected to administer student assessments that measure mastery of course content for each course offered. Accordingly, the school will use such state-adopted as well as school-based assessments to measure student progress toward mastery of the Florida Standards across all grade levels. The school will implement the states/district's testing calendar and performance measurements, with the same frequency of assessments, as amended from time to time in accordance with district and/or statewide assessments.

Students are expected to make annual learning gains toward achieving the State Standards as appropriate for the student's grade level. The annual gains will be measured by the student's developmental scale score on the state standardized assessments and on internal pre and post tests to be administered at the beginning and end of each school year. In addition to FCAT, FSA or EOC or other state approved standards based test assessments, the School will use internal pre and post testing to measure annual gains.

The following instructional activities will be will be integrated in the School program as a vehicle to achieve performance standards and to increase learning opportunities:

- Implement tutoring or Saturday tutoring for non-proficient students (as per state in order to maximize student achievement
- Implement parent workshops that will assist with the implementation of effective strategies at home
- Facilitate student participation in essay, poetry, and book writing contest in order to promote writing success
- Utilize assessment data, writing pretest, and other ongoing assessments to drive instruction and target remediation.
- Utilize assessment data to drive instruction and target remediation in order to maximize student achievement
- Implement FCAT, FSA and EOC tutoring program to increase reading levels, implement a variety of literature and maximize the use of standards-based reading components such as phonic and word recognition, reading complex text and writing to text
- Utilize state-adopted supplemental material in order to increase reading critical thinking skills.
- Implement flexible scheduling that designates two hours of English Language Arts/Reading instruction and one hour of daily collaborative grade level planning times.

B. Describe the school's student placement procedures and promotion standards.

Promotion from grade to grade shall be in accordance with the requirements set forth in the SLCSB *Student Progression Plan*. Each student must meet specific levels of performance in reading, writing, mathematics, and science in order to be promoted. For each student who does not meet state performance levels in reading, writing, mathematics, and/or science, the School may implement a school-wide Progress Monitoring Plan (PMP) to assist the student in meeting expectations for proficiency. In consultation with the parent/guardian, student performance may be evaluated and reported based on mastery of standards to determine a student's eligibility for promotion.

Instructional staff members may utilize such evaluative devices and techniques as may be needed to report individual achievement in relation to school goals, acceptance norms, and student potential. The academic grades in all subjects are to be based on the student's degree of mastery of the instructional objectives and competencies for the subject. The determination of the specific grade a student receives may be based on careful consideration of all aspects of each student's performance during a grading period: Class work, observations, tests, portfolios, state assessments, and written progress reports and report cards (at the end of every nine weeks of school) should serve as the primary means of communicating student progress and achievement of the standards for promotion. The student's mastery of the content of the course, in which the student is enrolled, as determined by the teacher, is a further condition for passing the course.

Student grades may be issued in accordance with State guidelines. Academic grades may reflect the student's academic progress based on the competencies/benchmarks for the grade level/course in which the student is enrolled. A student's academic grade may reflect the teacher's most objective assessment of the student's academic achievement. The determination of the specific grade a student receives may be based on the teacher's best judgment after careful consideration of all aspects of each student's performance during a grading period, including such factors as class attendance, homework, and participation. The grade may not be based on the student's effort and/or conduct, attendance or tardiness.

Reading and Mathematics - Any student who scores at Level 1 on the state standardized Reading assessment as adopted, the student must be enrolled in and complete an intensive reading course. Placement of Level 2 readers in either an intensive reading course or a content area course in which reading strategies are delivered shall be determined by diagnosis of reading needs. Furthermore, in the subsequent years, any student that does not score at a proficient level on the Florida State Assessment/ End of Course Exam or any state adopted assessment will also be enrolled in and complete an intensive reading course. Reading courses shall be designed and offered pursuant to the sponsor's comprehensive reading plan. Any student who scores at Level 1 and Level 2 on the state standardized Mathematics assessments as adopted, the student must receive remediation the following year, which may be integrated into the student's required mathematics course. In subsequent years, students who do not demonstrate proficiency in Mathematics Florida State Assessment/ End of Course Exam may also receive remediation.

English Language Learners - Promotion for an ELL student and an ELL student with disabilities is to be based on the student's performance in the dominant language while the student is in the process of becoming independent in English. Retention of an ELL student requires the review and

recommendation of the ELL committee. Retention of a student with disabilities who is also ELL requires the review and recommendation of the IEP team. Language Arts Through ESOL instructional time for ELL students must be equal to the time non-ELL students are required to participate in the regular English language arts/reading program.

Required Courses for Middle School Students - It is required that all students in the middle school receive instruction in the state and district grade level objectives and competencies approved in mathematics, language arts/ESOL, social science, science, physical education, and career exploration as well as in a range of exploratory/elective areas (including but not limited to music, art, theatre arts, dance, foreign language, and career and technical education).

Subject	Course Requirements	Additional Information
English	Three middle school annual courses.	For English Language Learners, the required course is M/Language Arts Through ESOL.
Mathematics	Three middle school annual courses.	Can include eligible courses for high school credit.
Science	Three middle school annual courses.	Can include eligible courses for high school credit.
Social Science	Three middle school annual courses. Civics is one of the required courses. It is offered in 7 th grade.	Beginning with the 2014-2015 school year, students must earn a passing score on the Civics EOC assessment to pass the Civics course and to be promoted from the middle school to senior high school (<i>The school will abide to any future modification to this mandate as per the FLDOE</i>)
Physical Education	One semester in 6 th , 7 th , and 8 th grade.	This requirement may be waived under the following conditions: <ul style="list-style-type: none"> -The student is enrolled in a remedial course. -The student's parent requests in writing that the student enroll in another course. -The student participates in physical activities outside the school day, which are equal to or in excess of the mandated requirement. -Students may elect additional physical education courses.

Electives* including Career and Education Planning	An elective course that incorporates career education and planning and at least 3 additional courses.	-This Career Planning course will culminate in completion of a personalized academic and career plan with an emphasis on technology or the application of technology in career fields. -The career and education planning course must inform students of high school graduation requirements, high school assessments and college entrance test requirements -Then student must also have completed his/her personalized academic and career plan.
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*Electives- Students scoring at Level 1 and Level 2 on the most recent state standardized Reading assessment may lose the opportunity to select an elective course and may be required to enroll in an intensive reading course as detailed below. Students scoring at Level 1 and Level 2 on most recent state standardized Mathematics assessment may also lose the opportunity to select an elective course. For ELLs at Levels 1 and 2, The M/J Developmental Language through ESOL course may count as an elective credit and for ELLs. This course is taken in lieu of an intensive reading course.

Middle School Placement – The school may use data (state and district requirements, report cards, testing scores, past performance and comportment) as factors for placement in the appropriate courses to best suit each child. Depending on individual student assessment results, some students may be required to enroll in remediation courses for mathematics and reading, which may take the place of electives.

Intensive Reading - These courses may be in addition to the required M/J Language Arts course in grades 6, 7, and 8. All Level 1 and 2 students, regardless of whether they are fluent, may be placed in the appropriate reading class as follows:

- **Intensive Reading Plus (IR+)** is intended for students with deficiencies in **decoding and fluency** in addition to vocabulary and comprehension. All students, with the exception of all ELL students, with deficiencies in **decoding and fluency**, who scored Level 1 or 2 in reading will be placed in an Intensive Reading Plus (IR+) class.
- **Intensive Reading (IR)** is intended for students with deficiencies in **vocabulary and comprehension**. All students, with the exception of all ELL students with deficiencies in **vocabulary and comprehension**, who scored Level 1 or 2 in reading will be placed in an Intensive Reading (IR) class. This class may focus on effective reading strategies and differentiated instruction that reinforces whole group instruction and provides opportunity for intervention within the classroom context.
- **Intensive Reading Enrichment (IR-EN)** is **Intensive Reading Enrichment (IR-EN)** – intended for students whose Reading scores have **regressed from Level 3 or higher to Level 2** and **students with high Level 2 scores**. All students, with the exception of all ELL students with high Level 2 scores or who have regressed from Level 3 or higher to Level 2 will be placed in an

Intensive Reading Enrichment (IR-EN) class. The class may focus on specific reading strategies targeted to enrich the level of instruction to significantly improve students' vocabulary and comprehension achievement using selected grade level text and novel units.

Intensive Mathematics - For student scoring Level 1 or Level 2, the student must receive remediation the following year, either by an M/J Intensive Mathematics course by grade level or remediation which may be integrated into the student's required mathematics course.

Senior High School Credits in Middle School - Students may enroll in selected senior high school courses to pursue a more challenging program of study. These courses are included when computing grade point averages and rank in class. Up to six credits may be earned, with parental permission, in grades 6, 7, and/or 8, for courses taken, which may be applied toward the total credits needed for graduation, college admission, or for the Florida Bright Futures Scholarship Program requirements. All high school credit courses taken in the middle school may be included in the high school transcript. In a grade below grade 9, and the benefit of retaking a course in which skills have not been mastered. Courses taken may remain a part of a student's middle school record, as well as the student's senior high school record. Credit may be earned in courses such as Algebra 1, Geometry, Physical Science Honors, Biology 1, Computer Programming 1, Foreign Language 1 above, Spanish for Spanish Speakers 1 above provided that all applicable End of Course or state adapted equivalent assessment requirements are met.

Middle School Promotion – Promotion from grade to grade may be in accordance with the requirements set forth in the SLCS Student Progression Plan.

Promotion and Placement Requirements in the Middle School

Middle School Promotion Requirements, Per the SLCS Progression Plan

Students in grades 6-8 will use the course system by semester instead of a yearlong point system for grading. Students must pass each semester with a grade of "D" or higher in both semesters in the following core subject areas to be promoted to 9th grade:

Mathematics: Three middle school or higher courses in mathematics. (Six Semesters)

The Algebra I FSA EOC will count for 30% of the student's grade, or in accordance with new legislation. The Geometry FSA EOC will count for 30% of the student's grade, or in accordance with new legislation.

English: Three middle school or higher courses. (Six Semesters) These courses shall emphasize literature, composition and technical text.

Science: Three middle school or higher courses. (Six Semesters)

Social Studies (Six Semesters), one of which must include the study of State and Federal Government and Civic education.

§ One of these courses will be at least one semester of a civics education course that a student successfully completes in accordance with s.1008.22(3)(c). Students transferring in from out of state, private or home school during second semester of 8th grade, are exempt from the Civics requirement.

Students who complete one of the required courses with a passing grade have met the successful completion requirements. In addition, the following options may be used as alternate documentation of successful completion of required courses:

- Student has successfully completed the course through a virtual school program or comparable computer-based program.
- Student has scored an acceptable level on subject-related state assessment or EOC.
- Student has completed the course through a summer or tutorial program.
- Student is a transfer student demonstrating mastery as outlined in Statute 6A- 1.09942, State Uniform Transfer of Students in Middle Grades.
- Student has documented mastery of course requirements by receiving a passing grade on a final exam, semester exams, or an end-of-course exit exam. Students completing eighth grade will be promoted to ninth grade following successful completion of the above requirements. Students will be retained in eighth grade if any of the above requirements are not met. If a student does not pass a required core semester class in sixth, seventh or eighth grade, and does not meet one of the alternate documentation methods, parents will be notified that the student will not be eligible for promotion to high school and will be retained in 8th grade unless the courses are successfully completed through repeating a course within the school day or credit recovery options.. Such notification must be provided at the end of each semester in which a student fails a core class. If a sixth or seventh grade student fails multiple core classes and an attainable remediation plan cannot be developed, the student may be recommended to an alternative program or retained in grade level. The final decision regarding grade placement is the responsibility of the principal. **In Addition to the Four Core Subjects**
- Middle school students will receive instruction, in a selection of electives chosen from, but not limited to, reading, art, music, and foreign language. The scheduling of this instruction shall be determined annually by the School Board (F.S. 1001.40)
- Students enrolled in grades 6-8 must have the equivalent of one class period per day of physical education for one semester of each year (225 minutes). § *PE Waiver* Students in grade K-8 are eligible to waive the physical education requirement if they meet any of the following criteria: The student is enrolled or required to enroll in a remedial course The student's parent indicates in writing to the school that the parent requests the student be enrolled in another course from among the courses offered as options by the school district; or the student is participating in physical activities outside the school day, which are equal to or in excess of the mandated requirement

6	All Courses Passed	Promoted to Grade 7 Regular 7 th grade student
6	4-5 Courses Passed Must pass language arts or mathematics and at least 3 other courses	7th Grade Student Placed in grade 7 and scheduled to repeat courses not passed as appropriate
6	Less than 4 Courses Passed in Grade 6	Retained 6th Grade Student
7	12 Cumulative Courses Passed 6 courses passed in grade 6 and 6 courses passed in grade 7	Promoted to Grade 8 Regular 8 th grade student
7	8-12 Cumulative Courses Passed 4 courses passed in grade 6 including language arts, mathematics, science, and social science. 4-5 courses passed in grade 7 including 7 th grade language arts or mathematics, science or social science, and/or a course which incorporates career education planning	8th Grade Student Placed in grade 8 and scheduled to repeat courses not passed as appropriate
7	7-8 Cumulative Courses Passed	Retained 7th Grade Student
8	15-18 Cumulative Courses Passed Must pass 3 courses each in language arts, mathematics, science, and social science, including a course which incorporates career and education planning and 3 additional courses.	Promoted to Grade 9
8	14 or Fewer Courses Passed	Retained 8th Grade Student

All State mandated EOC, FCAT, FCAT 2.0, FSA, FSA EOC, etc must be passed per state specifications for promotion.

Promotion for ELLs and ELLs with disabilities is to be based on the student's performance in the dominant language while the student is in the process of becoming independent in English. Retention of ELLs requires the review and recommendation of the ELL committee. Retention of a

student with disabilities who is also ELL (ESE/ESOL) has the same requirements as a non-ESOL student with disability. The IEP Team may review the goals and accommodations to address student needs, as appropriate.

Academic grades may be based on student mastery of the content of the course, as determined by the teacher using all available data. Teachers may consider all available data to determine the degree of student proficiency in meeting the Florida Standards and NG-SSS standards and mastery of course content. This data may include standardized test results, progress tests, daily assignments, teacher observation, and other objective information. The determination as to the specific grade a student receives may be based on careful consideration of all aspects of each student's performance during a grading period. Academic grades may be issued in accordance with state guidelines.

The following are the academic grades used:

Grade*	Numerical Value (%)	Verbal Interpretation	Grade Point Value
A	90 - 100	Outstanding progress	4
B	80 - 89	Good progress	3
C	70 - 79	Average progress	2
D	60 - 69	Lowest acceptable progress	1
F	0 - 59	Failure	0
I	0	Incomplete	0

C. *If the school will serve high school students, describe the methods used to determine if a student has satisfied the requirements specified in section 1003.4282, F.S., and any proposed additional requirements.*

NA

D. *Describe how baseline achievement data will be established, collected, and used. Describe the methods used to identify the educational strengths and needs of students and how these baseline rates will be compared to the academic progress of the same students attending the charter school.*

Baseline used for initial student placement may be collected by the school upon student registration using reports from previous school records (as applicable) and may include standardized test scores, End Course Exams, as applicable, or other performance-based criterion examinations, Interim Assessments and District Writing Test results, FAIR results, report card grades, attendance records, and behavioral records (including in school and out of school suspensions as well as exemplary behavior). In the case of Special Education, Individual Education

Plans (IEP) may be secured and the Individual ELL Student Plans will be obtained for English Language Learners (ELL).

To the extent available for an incoming student, the data may be used as a baseline in the student's incoming year and to track individual student progress from year to year. Data may be compared to current data at the end of each school year. For example, standardized test results from 2015 may be compared to state standardized test results from 2014 to determine educational strengths and needs of students and to compare the student's academic. Ongoing internal audits (Interim Progress Reports and Report Cards, FAIR Ongoing Assessments) of student performance may be used to identify the needs and strengths of students throughout the school year.

The baseline student academic achievement levels for the school may be established using multiple measures of student performance including data from school and state measures (listed in Section 5E below). These include: Baseline Assessments (BA) to set an initial baseline in Reading, Mathematics, Science, United States History, and Civics; FCAT or any other state adopted standardized test (as applicable) and other standards-based exams, district-developed or district-selected assessments, Interim Assessments, FAIR, as applicable. The school may collect individual student performance and achievement data soon as after the first BA and during every IA assessment and also throughout the year for all other assessments. Data may be used to determine student strengths and weaknesses and inform instruction in these areas.

Each year, baseline data may be established and used to determine annual growth by the students individually and also collectively informing stakeholders to the extent to which educational goals and performance standards have been met by the School. The baseline levels of academic achievement established during the first academic year may be compared to academic achievement levels in prior years. Student performance and achievement results may be compared to the academic progress of the same students from quarter to quarter and from year to year as a means to determine students are continuously improving and making learning gains.

Baseline data may also be made available to stakeholders and the community at-large, as reported in the *School Improvement Plan* via the needs assessment and also through specific learning objectives, which are written to address student's learning needs. The school may use this data to evaluate the effectiveness of the curriculum by determining the extent to which the School meets the Annual Measurable Objectives (AMO) set for the first year of operation (see *-Section 5 - Student Performance, Assessment and Evaluation*) and with consideration that changes may need to occur as the State solidifies plans for evaluating student mastery of the Florida Standards via Florida State Assessment/ End of Course Exams or whatever other assessment is selected. In subsequent years, the results may be gauged against the AMOs specified in the respective Annual School Improvement Plan and this method of goal setting and data collection may be used as a living and continuous improvement tool.

Interim Reports Cards and Report Cards track student's behavior and thus by using this data and comparing it to the baseline data, the school can identify strengths and weakness and determine whether a student's lack of progress may be related to behavioral or social/emotional factors and thus provide Behavioral interventions through RTI-B Process.

- E. Identify the types and frequency of assessments that the school will use to measure and monitor student performance.

The School will participate in Statewide assessment programs and will use the state standardized assessment scores, Somerset-wide and school-based assessments to measure student progress toward mastery Florida Standards in the content areas, as adopted, at all grade levels. These include but are not limited to:

<i>Baseline Benchmark Assessments: Reading/Writing, Mathematics, Science, Social Science</i>	BBA
<i>Florida Assessments for Instruction in Reading Assessment Period 1, 2 & 3 (AP1, AP2, & AP3)</i>	FAIR
<i>Interim Assessment Tests: Fall, Winter & Spring for Reading/Writing, Mathematics, Science, Social Science</i>	IA
<i>Comprehensive English Language Learning Assessment</i>	CELLA
<i>Stanford Achievement Test, Tenth Edition Reading and Mathematics</i>	SAT-10
<i>Science Florida Comprehensive Assessment Test 2.0</i>	Science FCAT 2.0
<i>Alternative Standardized Reading Assessment (as needed)</i>	ASRA
<i>The Iowa Tests (Iowa Tests of Basic Skills and Iowa Tests of Educational Development) Placement decisions for Gifted Program Exit ESOL Program (six semesters or more) ACCEL Option</i>	ITBS/ITED
<i>Florida End-Of-Course Exam and Florida Standardized Assessment; Civics/US History US History, Biology 1, Algebra 1, & Geometry and any other subject for which Florida adopts an EOC</i>	FL – EOC & FSA
<i>Teacher made Writing Pre-Test</i>	TWT
<i>Oral Language Proficiency Scale Revised Placement decisions for ESOL Exit ESOL Program- Second Instrument Needed</i>	OLPS-R
<i>On-line Comprehensive English Language Learning Assessment Placement decisions for ESOL Extension of services for ESOL Program</i>	On-line CELLA
<i>Scholastic Reading Inventory for Lexile Assessment</i>	SRI

*All Differentiated Accountability schools must administer assessments according to the dates established by the Office of School Improvement.

FAIR assessments may be administered three times per year to provide an ongoing measure of reading fluency and comprehension, predict Florida State Assessment/ End of Course Exam or State Adopted Assessment performance, and serve as a progress-monitoring device for teachers and students. Furthermore, English Language Learners may be assessed and served by ESOL-certified personnel and in accordance with the Sponsor's ELL Plan and the requirements of the *LULAC et al. vs. State Board of Education Consent Decree (1990)*.

The following assessments may be administered on an "as needed" basis:

- **Florida Alternate Assessment (FAA)** may be administered as needed on a one-on-one basis by the student's special education teacher to all students meeting the alternate assessment criteria

School-Based Assessments in all Courses may include:

- Weekly teacher-generated quizzes
- Monthly teacher-generated and textbook-adopted assessments
- Quarterly Exams
- Portfolios and presentations
- Class participation/presentation and PBL rubrics
- Quarterly projects /investigations
- Teacher Made Performance-Based Assessments

The School agrees to adopt the State's Testing Calendar for the duration of the charter, including changes and additional assessments as adopted.

F. Describe how student assessment and performance data will be used to evaluate and inform instruction.

The comprehensive assessment program may be used to inform stakeholders (students, parents, and teachers) about where a student is succeeding and what areas need strengthening. Assessment may serve as a feedback system to guide teachers in lesson planning and individualizing instruction. Additionally, it may guide students in understanding full mastery of each respective standard and it may keep parents informed about student progress through specific learning objectives.

Expectations are that students may progress at least as well as they did before attending the charter school, and that the specific measurable objectives for the school are achieved.

In addition, the School Instructional Leadership team –consisting of the principal, assistant principal, grade level chairs, ESE and ESOL teachers, Reading Coach and Media Specialist --- may monitor and analyze data to maintain a problem solving system that brings out the best in our school, teachers, and our students. The leadership team may meet weekly to:

- Evaluate data and correlate to instructional decisions;
- Review progress-monitoring data at the grade level and classroom level to identify students and their academic levels.
- Identify professional development to enhance students' achievement levels.

- Collaborate regularly, problem solve, share effective practices, evaluate implementation, make decisions, and practice new programs and skills.
- Facilitate the process of building consensus, increasing infrastructure, and making decisions about implementation.

Students' performance in the classroom may also be assessed by the classroom teacher, and students not making adequate progress towards the *Florida Standards* as evidenced in teacher made evaluations may also be identified, and appropriate measures for improvement may be instituted. Ongoing communication between the School and the parents may be maintained through on-line reporting systems such, web-based grade book and progress reports, parent conferences, and other forms of written and oral communication that the parents may be comfortable to utilize. Ongoing internal audits (Interim Progress Reports and Report Cards) of student performance, including beginning year, mid-year, and end-year assessments, may also be utilized as reflective and guidance tools.

The establishment of a *School Improvement Plan, as required*, may ensure school-wide student assessment and performance data can be shared with parents, students and other stakeholders. The SAC Committee for the School may participate in the development of the *School Improvement Plan* to ensure input from all stakeholders, including teachers, students, parents and community representatives. The attainment of specific learning objectives, with supporting documentation, may be detailed in the School's Annual Report, and copies may be made available to the charter school constituents on an annual basis.

G. Describe how student assessment and performance information will be shared with students and with parents.

Assessment may serve as a feedback system to guide teachers in lesson planning and individualizing instruction and to provide students with knowledge of their current levels of performance. Additionally, it may guide students in understanding full mastery of each respective standard and it may keep parents informed about student progress to specific learning objectives.

In addition, students' performance in the classroom may be assessed by the classroom teacher, and students not making adequate progress towards the *Florida Standards* as evidenced in teacher made evaluations may also be identified, and appropriate measures for improvement may be instituted. Ongoing communication between the School and the parents may be maintained through on-line reporting systems such, web-based grade book and progress reports, parent conferences, and other forms of written and oral communication that the parents may be comfortable to utilize. Specifically, the School may ensure communication with students/parents via the following district-mandated means, as follows:

- Progress Reports (Report Cards)
The School will issue Progress reports at the end of each marking period.
- Interim reports:
Not later than 4.5 weeks into the grading periods, an interim report will be sent to parents of students who are experiencing difficulty including, but not limited to, the following: failing,

a drop of two or more grades, unacceptable behavior and/or excessive absences. In schools with an automated system for record keeping and grading, interims may be provided for all students (as an indicator of satisfactory or unsatisfactory progress).

- Required Parental Notification for students in danger of not meeting promotion requirements.

The School will assist students to meet these requirements through a variety of options, which may include, but are not limited to:

- a. in class interventions,
- b. extended learning,
- c. special counseling,
- d. volunteer and/or peer tutors,
- e. school-sponsored help sessions,
- f. homework hotlines,
- g. study skills classes,
- h. advanced, high school credit courses.

Further, the establishment of a School Improvement Plan, as required, will ensure school-wide student assessment and performance data can be shared with parents, students and other stakeholders. The SAC Committee may participate in the development of the *School Improvement Plan* to ensure input from all stakeholders, including teachers, students, and parent representatives. The attainment of specific learning objectives, with supporting documentation, may be detailed in the School's Annual Report, and copies may be made available to the charter school constituents on an annual basis.

Section 6: Exceptional Students

A. Please indicate the level of service that the school will provide to students with disabilities by selecting from the list below.

- The school will serve students with disabilities whose needs can be met in a regular classroom environment (at least 80% of instruction occurring in a class with non-disabled peers) with the provision of reasonable supplementary supports and services and/or modifications and accommodations.
- ~~The school will serve students with disabilities whose needs can be met in a regular classroom and resource room combination (between 40% - 80% of instruction occurring in a class with non-disabled peers) with the provision of reasonable supplementary supports and services and/or modifications and accommodations.~~
- ~~The school will serve students with disabilities whose needs can be met in a separate classroom (less than 40% of instruction occurring in a class with non-disabled peers).~~

The school will serve students with disabilities whose needs can be met in a regular classroom environment (at least 80% of instruction occurring in a class with non-disabled peers) with the provision of supplementary supports and services and/or modifications and accommodations.

Students with disabilities enrolled in the School will be educated in the least restrictive environment and will be segregated only if the nature and severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily. An inclusion model with ESE support will be used, as appropriate, wherein the ESE Teacher and General Education teacher regularly monitor students' progress on attaining goals stated on the IEP as well as grade-level curriculum goals.

Students with disabilities may receive accommodations in the General Education setting as deemed appropriate on each Individual Educational Plan. During IEP meetings, the team will use the list of suggested accommodations on PEER, Sunshineconnections.org, or create custom accommodations to meet the needs of the students within the least restrictive environment. For example, if a student struggles to complete assignments within a given time period due to a processing delay, extended time to complete assignments may be given within the General Education setting.

For students requiring a more restrictive learning environment (i.e. Resource Room or Separate Class setting) to support their educational needs, an IEP team meeting will be held with the staffing specialist, a representative from the student's zoned school, and the child's parents to discuss the appropriate educational Placement.

Supplementary supports and services - Multidisciplinary Teams will first consider the least restrictive environment for all students with disabilities. The supplementary aids and services that will be provided to the students with disabilities will be dependent on the individual needs of each student. Students whose needs can be met in the General Education setting will receive either consultative or collaborative service from the ESE teacher. Depending on the needs of the students and as stated on an IEP, the following collaborative services may be offered by the ESE Teacher:

- **Consultation** - An inclusion model with ESE support will be used, as appropriate, wherein one general education teacher is providing instruction and an ESE Teacher is providing documented consultation services in accordance with the student's IEP in relation to the students academic, educational, behavioral, and transitional goals. For consultation services the general education teacher and ESE teacher meet face-to-face on a regular basis to plan, implement, and monitor instructional strategies designed to ensure the student's success in the general education classroom. The general education teacher and ESE teacher will regularly monitor students' progress on attaining goals stated on the IEP as well as grade-level curriculum goals.
- **Support facilitation** - One general education teacher is providing instruction and one ESE teacher is providing support by meeting with an individual student or small group of students on an individualized basis within a traditional classroom but not as co-teacher. The frequency and intensity of support varies based upon student's IEP needs. Provides the level of support based on general educators' and students' need for assistance. Support will be provided accordance with the student IEP. Both teachers use collaborative planning to make instructional decisions based on student data. Differentiated instruction strategies are implemented within lessons that support learning for all students. ESE teacher arranges for classroom and testing accommodations for students with disabilities.
- **Co-teaching** - Two teachers, one general education teacher and one special education teacher, are providing instruction through co-teaching. Both teachers share responsibility for planning, delivering, and evaluating instruction for all students (ESE and non-ESE students) in a class/subject for the entire class period.

During IEP meetings, the team will use the list of suggested accommodations on PEER or create custom accommodations to meet the needs of the students within the least restrictive environment. For example, if a student struggles to complete assignments within a given time period due to a processing delay, extended time to complete assignments may be given within the General Education setting. For students requiring a more restrictive learning environment (i.e. Resource Room or Separate Class setting) to support their educational needs, an IEP team meeting will be held with the staffing specialist, a representative from the student's home school, a general education teacher, and the child's parents to discuss the appropriate educational setting.

Identifying students for possible ESE services: The School will use the PS RtI/MTSS (Problem Solving Response to Intervention/ Multi-Tiered System of Supports) framework for making informed decisions about students' individual academic needs. This framework provides students who do not respond to instruction with increasingly intensive levels of intervention. In order to meet the requirements of the RtI/MTSS framework, the School will identify key administrative,

instructional and support staff members to serve as the School's RtI/MTSS team. Members of the team may include but are not limited to school counselor, teacher, and ESE teacher/program specialist.

The team will be responsible for developing progress monitoring plans that identify assessments used for diagnosis, placement and monitoring of students who are not performing at grade level, once parent written consent is provided.

The RtI process consists of the following: At the beginning of each school year the RtI/MTSS team will meet to review the screening data and identify students in need of additional support through Tier 2 intervention. Those students who meet benchmark standards will continue to remain at Tier 1 and their progress monitored at the next benchmark. While receiving intervention at Tier 2, a student's progress will be monitored by the RtI team to determine if progress is being made adequately. If a student is not progressing and the intervention has been implemented as designed, the student will be referred to the School Based Team (SBT) for the development and monitoring of Tier 3 interventions.

The SBT Team will consist of the School Administrator, School Psychologist, General Education Teacher, Parent and Special Education Teacher as well as any other key instructional and/or support personnel. The SBT Team will meet to review the screening and progress monitoring data and information provided from relevant records in order to develop more focused, intensive interventions for the student. The team will develop strategies to overcome any barriers to learning that may be identified. A progress monitoring schedule will be determined and responsible persons designated for the implementation of interventions and progress monitoring at Tier 3. Progress monitoring data will be collected a minimum of every two weeks with parent written consent. Student progress on intervention implementation will be shared with parent over time. SBT) will assist teachers in providing additional interventions for students with learning, emotional, social, and behavioral problems in school, primarily within general education classes. The SBT process is initiated as assistance is requested and the collection of student information such as history of grades, background screening, attendance, academic, behavioral and/or social-emotional screening assessments etc. is conducted. Continual filtering of student's response to intervention determines the effectiveness of interventions and assists in the data-based decisions. After the consideration of all the data by the SBT, a data- driven decision is made as to whether a referral for a Multidisciplinary Team evaluation will be initiated. This rigorous and constant sorting and analyzing of information makes the SBT a reliable and efficient system incorporating the tiers of intervention delivery.

If the focused, evidence-based interventions attempted at all Tiers do not produce a satisfactory level of progress, as evidenced by review of the RtI data and an analysis of any existing barriers to learning, interventions are modified and a comprehensive evaluation may be requested. Documentation of the various strategies and interventions employed in Tiers 2 and 3, as well as all data pertaining to progress monitoring, become part of the referral packet. Parents are kept informed of planned intervention efforts and the student's progress in response to intervention throughout the entire SBT process. The Sponsor's School Psychologist will periodically conduct

fidelity checks on the SBT Intervention Plan while assisting with progress monitoring data collection.

In addition to the SBT being a valuable resource for schools it is also a filtering process, which serves to fluidly move students through the tiers of intervention, always evaluating and monitoring their response to these interventions and making data-based decisions every step of the way. It is a process that ensures the delivery of general education interventions first to address student's academic, behavioral and/or social emotional needs. The filtering then begins as students who continue to perform below standards and show inadequate response to general education interventions, even when provided with appropriate instruction and evidence based interventions, formally enter the SBT process.

Referral Procedures – A referral for students suspected of having a disability will be initiated by school personnel with supporting documentation when the following determinations have been made:

1. The activities described in the general education intervention procedures above have been implemented, but have been unsuccessful in addressing the areas of concern for the student.
2. The parents of the child receiving general education interventions requested, prior to the completion of the interventions, that the school conduct an evaluation to determine the child's eligibility for specially designed instruction and related services as a student with a disability. In this case, the activities described in the general education interventions procedures will be completed concurrently with the evaluation but prior to the determination of the student's eligibility for specially designed instruction.
3. Significant risk factors are present or if the student demonstrates severe cognitive, physical or sensory impairments, or presents as a danger to self or others, an individual intervention plan will be developed as the child awaits the evaluation

If a student is suspected of having a disability consistent with established guidelines, the following procedures are to be followed:

1. A parent, teacher, or administrator may refer the student to the general education review committee. This committee should include the following individuals as appropriate: ESE coordinator, parent(s)/guardian(s), teacher(s), target area specialist(s) for reading/ELA, mathematics, school psychologist, ESOL representative, and school counselor. The school psychologist and the teacher must attend all general education review committee meetings.
2. The committee will meet to review the implementation and effectiveness of general education interventions. The committee's review shall include, but is not limited to, the Pupil Monitoring Plan (PMP), the ELL plan, social family background history (if appropriate), the Home Language Screener Questionnaire form, attendance history, progress monitoring and general education history.
3. If it is determined that the student has received appropriate educational interventions and they have been ineffective in addressing the student's educational needs, a referral for a comprehensive evaluation may be made.
4. The following information will be included in the request for evaluation packet: the Request for Evaluation, Notice of Intent and Parental/Guardian Consent to Conduct an

Evaluation, Speech and Language Evaluation Report (if applicable), Vision Screening Referral Report, Observation of Student Behaviors form (s) and School Social Worker Student Background Screening.

- a. For students who present emotional concerns, anecdotal records will also be included.
- b. For ELLs, the request for evaluation packet must also include: the individual ELL Student Plan with current results and data; the Home Language Screening Questionnaire form; language proficiency/dominance tests (formal and/or informal) in both English and the native language (if appropriate) with information to include dominant language at home; and the student's prior experience with formal education.

Eligibility for a special program for children with a disability is determined after the completion of the comprehensive evaluation and the activities described in the general education interventions procedures are completed.

Procedures for the development and review of IEPs for students with disabilities:

The School will establish procedures that provide for parents, guardians, surrogate parents, or persons acting in loco parentis to participate in decisions concerning the individual educational plan. Parents of each student with a disability will be members of any group that makes decisions for their child. In order to ensure that parents are present at each meeting, or are afforded the opportunity to participate at each meeting:

- Parents will be notified of the meeting at least ten days prior to set meeting to ensure that they have an opportunity to attend.
- The meeting will be scheduled at a mutually agreed upon time and place.
- A written notice to the parent will indicate the purpose; time; location of the meeting; who, by title or position, will be in attendance; and will include a statement informing the parents that they have the right to invite individuals with special knowledge or expertise about their child.

If neither parent can attend, the School will use other methods to ensure parent participation, including individual or conference telephone calls or video conferencing.

A meeting may be conducted without a parent in attendance if the parent indicated in the notification of meeting that they will not be able to attend and gives permission to proceed without or the school is unable to obtain the attendance of the parent. In this case, the school will maintain a record of its attempts to arrange a mutually agreed upon time and place.

The School will take whatever action is necessary to ensure that the parents and the student, beginning at age fourteen (14), understand the proceedings at a meeting, including arranging for an interpreter for parents and students who are deaf or whose native language is other than English.

IEP Team Participants

Decisions as to which particular teacher(s) or special education provider(s) are members of the IEP team will be made by the school based on the needs of the student.

The IEP team, with a reasonable number of participants, shall include:

- at least one regular education teacher of the student
- the parent(s) of the student
- at least one Special Education teacher
- A representative of the school who is qualified to provide or supervise the provision of specially designed instruction to meet the unique needs of students with disabilities, is knowledgeable about the general curriculum, and is knowledgeable about the availability of the schools resources
- An individual who can interpret the instructional implications of evaluation results
- At the discretion of the parent or the school, other individuals who have knowledge or special expertise regarding the student, including related services personnel, school counselor, special area teachers or support personnel.
- The student, if appropriate, and in all cases where a purpose of the meeting will be the identification of the student's transition service's needs. If the student does not attend the IEP team meeting to identify transition service's needs, the school will take steps to ensure that the student's preferences and interests are considered
- Agency representatives– To the extent appropriate and with the consent of the parents the school will invite a representative of any participating agency that may be responsible for providing services

IEP team member excusal

A member of the IEP team is not required to attend an IEP team meeting, in whole or in part, if the parent of a student with a disability and the School agree, in writing, that the attendance of the member is not necessary because the member's area of curriculum or related services is not being modified or discussed in the meeting.

A member of the IEP team also may be excused from attending an IEP team meeting, in whole or in part, when the meeting involves a modification to or discussion of the member's area of the curriculum or related services, if the parent, in writing, and the School consent to the excusal and the member submits, in writing to the parent and the IEP team, input into the development of the IEP prior to the meeting.

If a required IEP team member is unable to attend the meeting as scheduled, the parent can agree to continue with the meeting and request an additional meeting if more information is needed, or request that the meeting be rescheduled.

IEP timelines

Timelines for IEPs include the following:

- An IEP will be developed within thirty (30) calendar days following the determination of a student's eligibility for special education and related services and be in effect prior to the provision of these services.
- A meeting shall be held at least annually to review, and revise, as appropriate, each IEP.

Considerations in IEP development, review, and revision

The IEP team considers the following factors in the development, review, and revision of the IEP:

- Strengths of the student and concerns of the parents for enhancing the education of their child (Is this intended to include the mastery of a IEP goal as well?)
- Results of the initial or most recent evaluation or reevaluation
- As appropriate, results of the student's performance on state or district-wide assessments
- Academic, developmental, and functional needs of the student.
- In the case of a student whose behavior impedes the student's learning or the learning of others, strategies, including the use of positive behavioral interventions, supports, and other strategies to address that behavior
- In the case of a student with limited English proficiency, the language needs of the student as related to the IEP.
- In the case of a student who is blind or visually impaired, provision of instruction in Braille and the use of Braille.
- The communication needs of the student.
- Whether the student requires assistive technology devices or services.
- At least annually, whether extended school year (ESY) services are necessary for the provision of FAPE to the student.
- If, after considering all the factors mentioned above, the IEP team determines that a student needs a particular device or service, including an intervention, accommodation, or other modification, in order to receive FAPE, the IEP includes a statement to that effect

Content of the IEP

Each IEP will include the following:

- A statement of the student's present levels of academic achievement and functional performance, including how the student's disability affects the student's involvement and progress in the general curriculum.
- A statement of measurable annual goals, including academic and functional goals designed to meet the student's needs that result from the student's disability to enable the student to be involved in and make progress in the general curriculum.
- A description of benchmarks or short-term objectives for students with disabilities who take alternate assessments aligned to alternate achievement standards, or any other student with a disability, at the discretion of the IEP team.
- A statement of the special education and related services, and supplementary aids and services, based on peer-reviewed research to the extent practicable, to be provided to the student, or on behalf of the student.
- A statement of the classroom accommodations, modifications, or supports for school personnel that will be provided for the student to advance appropriately toward attaining the annual goals.
- An explanation of the extent, if any, to which the student will not participate with nondisabled students in the regular class or in the activities described above.
- A statement addressing any individual appropriate accommodations necessary to measure the academic achievement and functional performance of the student on the State or district assessments.
- If the IEP team determines that the student will take an alternate assessment instead of the regular state or district assessment of student achievement, the IEP must include a statement

of why the student cannot participate in the regular assessment and why the particular alternate assessment selected is appropriate for the student.

- The projected date for the beginning of the special education, services, accommodations, and modifications described and the anticipated frequency, location, and duration of those services.
- A statement of how the student's progress toward meeting the annual goals will be measured and when periodic reports on the progress the student is making toward meeting the annual goals will be provided.

Changes to the IEP:

The School will ensure that the IEP team revises the IEP as appropriate to address:

- Any lack of expected progress toward the annual goals and in the general curriculum, if appropriate
- Results of any reevaluation conducted
- Information about the student provided to or by the parents
- The student's anticipated needs or other matters
- Parent requests for revisions of the student's IEP

Generally, changes to the IEP must be made by the entire IEP team at an IEP team meeting and may be made by amending the IEP rather than by redrafting the entire IEP (interim IEP).

An IEP must be in effect before special education and related services are provided to an eligible student and will be implemented as soon as possible following the IEP team meeting. In addition, the IEP will be accessible to each regular education teacher, special education teacher, related service provider, and other service provider who is responsible for its implementation. All teachers and providers will be informed of their specific responsibilities related to the implementation of the IEP and the specific accommodations, modifications, and supports that must be provided for the student in accordance with the IEP. The School will make substantial efforts to assist the student in achieving the goals and objectives or benchmarks listed on the IEP.

The School will take steps to ensure that students with disabilities have available to them the variety of educational programs and services available to nondisabled students in the area served by the school district, including art, music, industrial arts, consumer and homemaking education, and vocational education.

The range of services provided will depend on the student's needs and accommodating those needs to the degree that the school can provide accommodation. The ESE teacher WILL provide services within his/her scope that the school does not need to contract out for.

Range of Services:

1. If the school has students with Speech and/or Language Impairment, the school will contract with a Speech and Language Pathologist *and provide* Speech Therapy and Language Therapy. The location, duration, and frequency of service will be dependent upon each individual student's needs and that which is stipulated on the Individual Educational Plan (IEP).
2. If the school has students with a Specific Learning Disability, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation.

3. If the school has students with Other Health Impairment, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation. A school counselor may also provide weekly or monthly counseling.
4. If the school has students with Emotional Behavioral Disability, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation. A school counselor may also provide weekly or monthly counseling.
5. If the school has students with Spectrum Disorder, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation. A school counselor may also provide weekly or monthly counseling.
6. If the school has students that are Deaf or Hard of Hearing, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation.
7. If the school has students with Developmental Delay, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation. The school will work with the Sponsor to re-evaluate the students with a Developmental Delay in order to determine the most appropriate services.
8. If the school has students with Dual Sensory Impairment, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation. The school may contract other personnel to provide services that are deemed necessary on the IEP.
9. If the school has students with Intellectual Disability, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation.
10. If the school has students with Physical Therapy needs the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, consultation and collaboration. In this case the school would contract with Physical Therapist *and provide* physical therapy. The location, duration, and frequency of service would be dependent upon each individual student's needs and that which is stipulated on the Individual Educational Plan (IEP).
11. If the school has students with Occupational Therapy Disability, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation. In this case the school would contract with an Occupational Therapist *and provide* occupational therapy. The location, duration, and frequency of service would be dependent upon each individual student's needs and that which is stipulated on the Individual Educational Plan (IEP).
12. If the school has students with Orthopedic Impairment Disability, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation. In this case the school would contract with an Occupational Therapist and/or Physical Therapist *and provide* occupational or physical therapy. The location, duration, and frequency of service would be dependent upon each individual student's needs and that which is stipulated on the Individual Educational Plan (IEP).

13. If the school has students with Traumatic Brain Injury, the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation.
14. If the school has students with Visual Impairment. In this case the school will provide services within the General Education setting. An ESE teacher may provide the following services: co-teaching, support facilitation, or consultation. The school may contract other personnel to provide services that are deemed necessary on the IEP.

The School will not be equipped to provide a full range of services. As with all students, the greatest service we can provide special student populations is to hold them to the highest reasonable academic and behavioral standards. At Somerset, we believe that all students can and should be judged according to high academic and behavioral standards. We agree with the President's Commission on Special Education: A New Era: Revitalizing Special Education for Children and Their Families that, "the system must be judged by the opportunities it gives and the outcomes achieved by each child." While certain students require support due to special needs, these students will be included in the mainstreamed classroom. Special education services for fulfilling IEP stipulations and 504 Plans will be in compliance with all applicable statutory and regulatory requirements, as is reasonable. Parents of newly admitted students will be asked whether their children have received special education services in the past. When a parent indicates that a child has received special education services, records will be solicited and carefully examined by school faculty and ESE Coordinator in conjunction with the Sponsor assigned District Support Personnel, as is evident in the staffing plan budget. Parents and teachers will attend a meeting led by the ESE Coordinator (certified in special education and responsible for developing and implementing IEPs), District Support Personnel and a school administrator to determine appropriate services to be delivered at the school.

In regular School Based Team (SBT)/Child Study Team (CST) meeting conversations, faculty will discuss concerns about particular students; when appropriate these concerns will be brought to the attention of families. These discussions will be guided by a spirit of proactivity. In other words, faculty will not wait until a student has established a pattern of failure; concerns about a potential special need will be raised as soon as they are identified. The intimate nature of the school will allow us to conduct a thorough pre-RTI referral process. Faculty will make subtle research-based adjustments in classroom instruction and assess the impact of these adjustments, reporting the results to other faculty members and to families. Parents will be notified about these adjustments.

If these adjustments fail to address the area of concern, a SBT/CST/IEP meeting will be held—directed by the school's ESE coordinator or school site administrator to determine next steps. During this meeting, parents and regular academic teaches will discuss adjustments that have been made thus far in the classroom. Assessments will be identified that might shed light on a student's needs. Once these assessments have been conducted, the Team will be reconvened and determine whether or not a student is eligible for RTI services in order to determine eligibility for special education, and whether or not the student's parents consent to such services being provided. Students with disabilities will be included in the mainstream classroom to the greatest extent possible.

B. Describe how the school will ensure that students with disabilities will have an equal opportunity of being selected for enrollment in the charter school.

The School will not discriminate on the basis of race, religion, or national or ethnic origin, or exceptionality in the admission of students. Any eligible student who submits a timely application and whose parents accept the conditions of the Parental Involvement Contract shall be considered, unless the number of applications exceeds the capacity of the program, class, grade level, or building. The School will be open to any student residing in the county. The School will have an open admissions procedure, utilizing a "first come, first served" policy as required by statute, unless the number of applicants exceeds capacity. In such case, all applicants shall have an equal chance of being admitted through a random selection process conducted by the School's accounting firm in conformity with Florida's Charter School Legislation. This process doesn't take into account a student's background, ethnicity, race, socio economic status or disability, and therefore allows for every student who applies to have an equal opportunity to enroll in the school.

C. Describe how the school will work with the sponsor to ensure the charter school is the appropriate placement for each student with a disability, based on the student's needs.

The School hereby agrees to adopt and implement the Sponsor's policies and procedures with respect to the Special Education, as amended from time to time, within the power of the school and according to reasonable expectation. Operating under the auspices of the Sponsor as the Local Education Agency (LEA), the School will assume responsibility for programming and delivering related services to exceptional students, as identified in the student's IEP with adherence and fidelity to the Sponsor's policies, and with provisions further detailed in the paragraph that follows. The School does acknowledge a need for a collaborative linkage with the Sponsor, especially with respect to the responsibilities that exist for providing a free appropriate public education to children with disabilities And ensuring that the needs of ESE students are met.

Students with disabilities may receive accommodations in the General Education setting as deemed appropriate on each Individual Educational Plan. During IEP meetings, the team will use a list of suggested accommodations or create custom accommodations to meet the needs of the students within the least restrictive environment. For example, if a student struggles to complete assignments within a given time period due to a processing delay, extended time to complete assignments is a reasonable and appropriate accommodation implemented within the General Education setting. For students requiring a more restrictive learning environment (i.e. Resource Room or Separate Class setting) to support their educational needs, an IEP team meeting will be held with the staffing specialist, a representative from the student's zoned school, and the child's parents to discuss the appropriate educational Placement.

Identifying students with special needs- Appropriately certified personnel will ensure that students' needs are being met even before student is identified or evaluated for Exceptional Education Services through a Response to Intervention (RtI) process, wherein interventions will be front-loaded in the general education classroom as a first step allowing student to receive support and have an opportunity to learn. The RtI

framework will be a comprehensive support to students. The school will practice RtI as prevention oriented approach to linking assessment and instruction. This can then inform teachers on how to best teach their students. The goal of the RtI model at the school is to minimize the risk for long-term negative learning outcomes by responding quickly and efficiently to documented learning or behavioral problems and ensuring appropriate identification of students with disabilities.

The School will use the Response to Intervention (RtI) model for the implementation of research-based instruction and intervention. The school will identify students at-risk for poor learning outcomes; monitor student progress; provide evidence-based interventions and adjust the intensity and nature of those interventions depending on a student's responsiveness; and subsequently begin the process to identify students with learning disabilities or other disabilities. The RtI implementation at the school will contribute to more meaningful identification of learning/behavioral problems, improve instructional quality, provide all students with the best opportunities to succeed at the school, and assist with the identification of learning difficulties and problems. The RtI model at the school will have four essential components: A school-wide, multi-level instructional and behavioral system for preventing school failure, screening, progress monitoring, data-based decision making for instruction and movement within the multi-level system. Regardless of the number interventions the school implements, each will be classified under one of the three levels of prevention. This will allow for a common understanding across the entire process.

At Tier I, research-based core instructional and behavioral methodologies, practices and supports designed for all students provide the foundation in general education. Tier II consists of supplemental instruction and interventions that are provided in addition to and in alignment with core instruction and behavioral supports to targeted groups of students identified as needing additional assistance. The school will use the Comprehensive Research Based Reading Plan (CRRP) to determine specific intensive reading and math interventions that can be used for students at Tiers I and II. Tier III is targeted for those students that require intensive instructional or behavioral intervention in addition to and in alignment with core instruction. At this tier, instruction and intervention intensity is reflected in increased frequency, greater duration and/or more individualization.

The RtI process consists of the following:

- RtI teams review (Tier 1 meetings) the screening data and identify students in need of additional support through Tier 2 intervention. For those students that meet benchmark standards, they will continue to remain at Tier 1 and their progress monitored at the next benchmark assessment.
- While receiving intervention at Tier 2, a student's progress will be monitored by the RtI team to determine if progress is being made adequately. If a student is not progressing and the intervention(s) has been implemented as designed, the student will be referred to the School Based Team (SBT).

As previously stated, faculty follows the standards to develop lesson plans accordingly. Teachers will follow the state mandated RtI process to monitor interventions being delivered to all students that demonstrate a need based on state assessments and teacher

recommendation. Further, one of the programs that the school is considering, Triumphs, is an approved program for the teachers to use as a Response to Intervention. Section 4 of the application clearly enumerates the RtI steps: **Response to Intervention (RtI)**- The RtI model is a multi-tiered approach to providing high quality instruction and intervention matched to student needs, using learning rate over time and level of performance to inform instructional decisions.

Embodied in each tiers are four steps:

Step 1-Identify the problem.

Step 2-Analyze the problem and determine why there is a discrepancy.

Step 3-Establish a performance goal for the student, develop an intervention plan to address the goal, and monitor the student's progress during implementation.

Step 4-Use research-based data, collected during the progress monitoring, to evaluate the effectiveness of the intervention. Once effectiveness has been evaluated, RtI team determines if additional intervention is needed and/or adjust the intervention to support student progress.

RtI Three Tier Model: Within the RtI structure, resources are aligned in direct proportion to student needs and are depicted into a three-tier model that used increasingly more intense instruction.

•**Tier 3: Intensive, Individualized Interventions Supports.** The most intense instruction and intervention based upon individual student need. During this stage, intervention frequency is increased and one to one support is provided as needed.

•**Tier 2: Targeted, Supplemental Interventions Supports.** More targeted instruction/intervention in addition to supplemental support, in addition to differentiated/small group instruction. Identified students will receive a minimum of 20 additional minutes of instruction to provide instructional support.

•**Tier 1: Core, Universal Instruction Supports:** General academic instruction and support is provided to all students in all settings. Section 6 points out that the intimate nature of the school will allow us to conduct a thorough pre-RTI referral process. Section 6 goes on to explain that the School Based Teams/Child Study Teams will administer tests/assessments will be identified that might shed light on a student's needs. Once these assessments have been conducted, the team will be reconvened and determine whether or not a student is eligible for RTI services in order to determine eligibility for special education, and whether or not the student's parents consent to such services being provided. Section 6 also mentions identifying students with special needs through a Response to Intervention (RtI) process, wherein interventions will be front-loaded in the general education classroom as a first step allowing student to receive support and have an opportunity to learn. The RtI framework will be a comprehensive support to students. The school will practice RtI as prevention oriented approach to linking assessment and instruction. This can then inform teachers on how to best teach their students. The goal of the RtI model at the school is to minimize the risk for long-term negative learning outcomes by responding quickly and efficiently to documented learning or behavioral problems and ensuring appropriate identification of students with disabilities.

The School will use the Response to Intervention (RtI) model for the implementation of research-based instruction and intervention. The school will identify students at-risk for poor learning outcomes; monitor student progress; provide evidence-based interventions and adjust the intensity and nature of those interventions depending on a student's responsiveness; and subsequently begin the process to identify students with learning disabilities or other disabilities. The RtI implementation at the school will contribute to more meaningful identification of learning/behavioral problems, improve instructional quality, provide all students with the best opportunities to succeed at the school, and assist with the identification of learning difficulties and problems. The RtI model at the school will have four essential components: A school-wide, multi-level instructional and behavioral system for preventing school failure, screening, progress monitoring, data-based decision making for instruction and movement within the multi-level system. Regardless of the number interventions the school implements, each will be classified under one of the three levels of prevention. This will allow for a common understanding across the entire process.

At Tier I, research-based core instructional and behavioral methodologies, practices and supports designed for all students provide the foundation in general education. Tier II consists of supplemental instruction and interventions that are provided in addition to and in alignment with core instruction and behavioral supports to targeted groups of students identified as needing additional assistance. The school will use the Comprehensive Research Based Reading Plan (CRRP) to determine specific intensive reading and math interventions that can be used for students at Tiers I and II. Tier III is targeted for those students that require intensive instructional or behavioral intervention in addition to and in alignment with core instruction. At this tier, instruction and intervention intensity is reflected in increased frequency, greater duration and/or more individualization.

The RtI process consists of the following:

- RtI teams review (Tier 1 meetings) the screening data and identify students in need of additional support through Tier 2 intervention. For those students that meet benchmark standards, they will continue to remain at Tier 1 and their progress monitored at the next benchmark assessment.
- While receiving intervention at Tier 2, a student's progress will be monitored by the RtI team to determine if progress is being made adequately. If a student is not progressing and the intervention(s) has been implemented as designed, the student will be referred to the School Based Team (SBT).

Least restrictive environment (LRE) and placement determinations:

To the maximum extent appropriate, students with disabilities will be educated with students who are not disabled. A school will use the term "inclusion" to mean that a student is receiving education in a general education regular class setting, reflecting natural proportions and age-appropriate heterogeneous groups in core academic and elective or special areas within the school community; a student with a disability is a valued member of the classroom and school community; the teachers and administrators support universal education and have knowledge and support available to enable them to effectively teach all children; and a student is provided access to technical assistance in best practices, instructional methods, and supports tailored to the student's needs based on current research.

In determining the educational placement of a student with a disability, the School will work with the sponsor to ensure that:

- The placement decision is made by a group of persons, including the parents, and other persons knowledgeable about the student, the meaning of the evaluation data, and the placement options.
- The placement decision is made in accordance with the LRE provisions listed above.
- The student's placement is determined at least annually, is based on the student's needs as indicated in their IEP.
- In selecting the LRE, consideration is given to any potential harmful effect on the student or on the quality of services that he or she needs.
- A student with a disability is not removed from education in age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

In providing or arranging for the provision of nonacademic and extracurricular services and activities (including meals, recess periods, counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by the school, and referrals to agencies that provide assistance to individuals with disabilities) the school will ensure that each student with a disability participates with students who are not disabled to the maximum extent appropriate to the needs of the student. The School will ensure that each student with a disability has the supplementary aids and services determined by the student's IEP team to be appropriate and necessary for the student to participate in nonacademic settings.

Operating under the auspices of the Sponsor as the Local Education Agency (LEA), the School will assume responsibility for programming and delivering related services to exceptional students, as identified in the student's IEP with adherence and fidelity to the Sponsor's policies, and with provisions further detailed in the paragraph that follows. The School does acknowledge a need for a collaborative linkage with the Sponsor, especially with respect to the responsibilities that exist for providing a free appropriate public education to children with disabilities and ensuring that the needs of ESE students are met.

The School hereby agrees to adopt and implement the Sponsor's policies and procedures with respect to serving students with disabilities, including the procedures for identifying students with special needs, developing Individualized Education Plans, and 504 Plans (as applicable). Special Education students will be provided with programs implemented in accordance with federal, state, and local policies (specifically, the Individuals with Disabilities Education Act (IDEA); the Americans with Disabilities Act of 1990 (ADA); Section 504 of the Rehabilitation Act of 1993; Sections 1000.05 and 1003.57, Florida Statutes; Chapter 96-186, Laws of Florida; and Chapter 6A-6 of the Florida Administrative Code.

Additionally, the School will follow guidelines and procedures as required by SLCPS. The educational program for exceptional students will include and adhere to the principles of the law as follows:

- **Free appropriate public education (FAPE)** - will be provided to every exceptional student enrolled in the School. That is, Free - no cost to parents; appropriately suited to individual needs of the child; public - provided by and paid for by the public education system; education-including extracurricular activities.

- **Appropriate evaluation** – evaluations will occur within appropriate timeframes and in accordance with published guidelines.
- **Individual Education Plans (IEP) and Educational Plans (EP)** will be developed, and maintained and meetings will be held in accordance with Sponsor’s guidelines.
- **Parent/Student Participation in Decisions** – including, but not limited to, giving consent for evaluation and initial placement, helping design the IEP, helping the School understand their child.
- **Procedural Due Process** – a non-discriminatory policy regarding the eligibility, identification, location, placement and evaluation process as well as adherence to procedural guidelines for all of these will consistently be implemented. Notwithstanding, when in question, due process hearings may be initiated by a parent or the district on the proposal or refusal to initiate or change the identification, evaluation, or educational placement of the student or the provision of a free appropriate public education.
- **Least Restrictive Environment:** Students with disabilities will be educated in the least restrictive environment and will be segregated only if the nature and severity of the disability is such that education in regular classes, with the use of supplementary aids and services, cannot be achieved satisfactorily. Similarly, gifted students will be educated in an environment that promotes acceleration

Developing Individualized Education Plans: Students will be guaranteed a free appropriate education and evaluation as well as consequent placement and implementation of an appropriate IEP. The written individualized educational plan for each student will include measurable annual learning goals and behavioral goals that may involve the evaluation of behavior through a Functional Assessment of Behavior (FAB) and the development of a Behavior Intervention Plan (BIP). Additionally, program components, goals, progress reports to parents on goals, diploma options, curriculum whether standard and/or modified, and assessment may also be addressed therein. Supplementary aids and related services will also be identified as well as necessary accommodations and modifications will be clearly delineated in this written plan. The School will ensure that appropriate personnel will be trained in using PEER and Sunshine Connections. The school will use the Florida Department of Education’s “Developing Quality Individual Educational Plans” as a guide when developing IEPs.

The IEP Team will include: parent, LEA, Gen Education, Special Education Teacher and all additional members of the team that will be notified with a reasonable amount of time and all appropriate contacts will be made. Input from all team members and student data will be used to create a program, including goals and accommodations.

504 Plan Procedures: A student is entitled to FAPE and may be entitled to Section 504 accommodations if he or she has a physical or mental impairment that substantially limits one or more major life activities. That is to say, for students experiencing difficulty in the classroom and for whom there is the suspicion of a disability should initially be referred to the SBT. The SBT will follow all established procedures and determine if appropriate to refer for possible 504 Plan services.

The eligibility/ineligibility is based on a variety of sources. 504 Eligibility sources may include teacher observations, information from parents, and information from medical providers, standardized test scores, grades, or other pertinent information. The school will contact the Sponsor

to request to schedule Section 504 eligibility meetings. Parents must receive notice of the Section 504 meeting and be invited to attend. Parents and students should be encouraged to attend the meeting and provide input that would help the committee in making decisions. Section 504 teams that convene for annual or interim meetings should consist of the parents, the student, the school administrator or designee, and school personnel who are familiar with the student, such as the student's teacher or counselor.

Federal and State Reports: Unless otherwise exempted by Chapter 1002, Florida Statutes, the School will complete federal, state and any other reports deemed necessary in accordance with the timelines and specifications of the Sponsor and the State Department of Education.

D. Describe how the school will utilize the regular school facilities and adapt them to the needs of exceptional students to the maximum extent appropriate, including the use of supplementary aids and services.

The School will make adaptations to school facilities, to the maximum extent appropriate and within provisions of the law, the Americans with Disabilities Act of 1990 (ADA), to ensure that students with disabilities enrolled in the School will be educated in the least restrictive environment. Supplementary aids and services will be provided on a need basis as stated on a student's IEP. Contracted SLP, OT, and PT personnel will be hired by the school to service the needs of each student.

Supplementary supports and services and/or modifications - Multidisciplinary Teams will first consider the least restrictive environment for all students with disabilities and will be segregated only if the nature and severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily. The supplementary aids and services that will be provided to the students with disabilities will be dependent on the individual needs of each child. Each Multidisciplinary team will consider the least restrictive environment for the SWDs. Those students whose needs can be met in the General Education setting will receive either consultative or collaborative service from the ESE teacher. Depending on the needs of the students, the following collaborative services may be offered by the ESE Teacher: co-teaching or support facilitation. Students in need of a co-teaching model will receive direct services from the ESE teacher and General Education teacher. Teachers will plan, grade and teach together. The ESE Teacher will provide instruction throughout the entire class period. For students in need of collaboration through support facilitation, the ESE teacher and General Education teacher will teach together but the level and frequency of support may vary per student.

Students with disabilities may receive accommodations in the General Education setting as deemed appropriate on each Individual Educational Plan. During IEP meetings, the team will use the list of suggested accommodations on PEER/Sunshine Connections or create custom accommodations to meet the needs of the students within the least restrictive environment. For example, if a student struggles to complete assignments within a given time period due to a processing delay, extended time to complete assignments may be given within the General Education setting. A separate room will be

provided for the use of supplementary aides and services such as OT, PT, speech/language therapy, counseling or any services by any contracted personnel.

E. Describe how the school's effectiveness in serving exceptional education students will be evaluated.

The School's effectiveness in serving special education students will be evaluated in the ability for the student to demonstrate learning gains consistent with the annual goals specified in the child's IEP. In addition, data from State, district and school based assessments (baseline, screening, progress monitoring and diagnostic) will be collected and monitored regularly by the ESE and General Education teachers to measure growth and determine if modifications or adjustments to instructional strategies or accommodations are needed.

The goals for determining the School's effectiveness in serving special education students are consistent with the goals set for all students of the School or as specified in the child's IEP. SWD's goals will be monitored quarterly. Parents will be notified of progress through a Status Report on Goals.

In addition to these goals, data from interim assessments, districts, state assessments will be used to determine whether students' needs are being met. Parents will be notified of student progress on a quarterly basis, at minimum, through a Status Report on such goals. In addition, feedback from the Sponsor's annual ESE compliance review will also help the School to measure its effectiveness in serving student's needs. The district will monitor the ESE program to ensure full compliance.

F. Explain how exceptional students who enter the school below grade level will be engaged in and benefit from the curriculum.

When an ESE-eligible student is determined to be performing below-grade-level in reading, writing, mathematics, and/or science, the IEP Team may be convened to review the IEP. The student's IEP must address all of the student's educational needs, including the student's below-grade-level performance. The IEP Team may recommend Tier 2 RtI interventions to address the student's educational need in reading, writing, mathematics, and/or science.

The School's program allows students to make real-world connections thereby encouraging all students to be more engaged. This allows students, including those in special education, entering below grade level to benefit more from the core curriculum. The school will take steps to ensure that these students, in particular, are successful. For example, the school will determine the level of mastery in reading, writing, mathematics and science for all students using baseline data and interim assessment data. This information, coupled with the prior year's standardized tests results and student records, will be used to determine the best educational setting for students (e.g., appropriate course selection, tutoring, referral for special services).

The Florida Standards articulate rigorous grade-level expectations in the areas of Mathematics and English Language Arts. Students with disabilities must be supported and challenged to excel within the general curriculum and be prepared for success in their post-school lives, including college

and/or careers. In order to accomplish this, the School will commit to instruction that incorporates supports and accommodations, including¹:

- Supports and related services designed to meet the unique needs of these students and to enable their access to the general education curriculum.
- An Individualized Education Program (IEP), which includes annual goals aligned with and chosen to facilitate their attainment of grade-level academic standards.
- Teachers and specialized instructional support personnel who are prepared and qualified to deliver high quality, evidence-based, individualized instruction and support services.
- Teachers who maintain a culture of rigor and high expectations in alignment with the Florida Standards expectations.
- Instructional accommodations in materials or procedures-, which do not change the standards but allow students to learn within the framework of the Florida Standards.
- Assistive technology devices and services to ensure access to the general education curriculum and the Florida Standards.
- Instructional supports for learning based on the principles of Universal Design for Learning (UDL), which foster student engagement by presenting information in multiple ways and allowing for diverse avenues of action and expression.

Apart from providing the specific services listed in a student's IEP, EP, and/or ELL plan, as applicable, the School's faculty will differentiate instruction as necessary, as well as offer tutoring services or other such assistance to ensure students remain successful. Student performance will be continuously assessed and students not making adequate progress towards mastery of the *Florida Standards and NGSSS as applicable* will be provided with appropriate supports and interventions as follows:

- Reading strategies in the content areas will be facilitated throughout the curriculum to provide students with additional practice in addition to those taught during Reading/Language Arts classes.
- Morning, Saturday, and daily pullout tutoring may be required for those students consistently demonstrating non-mastery of the standards.
- Students consistently demonstrating non-mastery of benchmarks on teacher generated quizzes, chapter tests, projects, investigations, and poor academic progress will be targeted for supplemental and intensive instruction/intervention.
- For all students showing deficiencies in any of the content areas, the IEP team will reconvene to review the current IEP and modify the goals, accommodations in an effort to remediate the student and provide the most appropriate educational plan of action.

In addition, students needing remediation based on respective subject area assessments in specific subject areas will be assigned to and placed on a specific Progress Monitoring Plan (PMP) targeting these deficiencies. This plan requires active participation from the student, the parents and specific teachers in order to ensure continuous student improvement. This initiative allows each student to have ownership and understating of his/her learning style and allows each student to track and monitor his/her achievement. The PMP will be comprised of specific measurable individualized goals for that student,

¹<http://www.corestandards.org/assets/application-to-students-with-disabilities.pdf>

as well the strategies and services (tutoring/required additional classes, etc.) to be implemented in order for the student to achieve the specified goal.

G. Provide the school's projected population of students with disabilities and describe how the projection was made.

The School will be nonsectarian in its programs, recruitment, admission policies and operations. The promotional plan to be followed in publicizing the School will be designed to reach the entire community and, accordingly, all groups within it. By publicizing the availability of the School throughout Saint Lucie Count, the School's demographic composition should mirror that of the local community. Therefore it is anticipated that the School's total enrollment should include approximately 11% of students with disabilities.

The school has based its projections on the average current enrollment in the District, which currently estimate an average of 11% SWD student population. The data was derived from the 2015 LEA Profile published by Florida Department of Education Bureau of Exceptional Education and Student Services.²

H. Identify the staffing plan, based on the above projection, for the school's special education program, including the number and qualifications of staff.

The school will have at least one (1) general ed teachers who is dually certified in ESE with proper certifications available to serve students with disabilities as projected by an estimated 11% of SWDs currently attending the district schools. The school teaching staff will include a certified ESE Teacher with demonstrated experience in providing support and services to children with disabilities. The ESE Teacher will be an employee of the School or a shared employee of SCPA, and will at a minimum possess full certification in special education. The school will increase number of staff based on actual enrollment of SWD and their specific needs.

The ESE Teacher will ensure the implementation of all IEPs and Section 504 Plans. The needs of the population of students with disabilities will dictate the role of the ESE Teachers. The ESE teachers will provide services within the General Education setting through consultation, collaboration, and/or support facilitation, as well as maintain all ESE records to ensure compliance. If the needs of the SWDs include consultative and collaborative services, the ESE teacher can arrange his/her schedule to meet the needs of the students and maintain compliance of records. For example, the ESE teacher may co-teach a class in Reading/LA and/or math and meet the needs of those students as well as consult with the General Education teachers on a weekly or monthly basis to ensure SWD students on consultation are making progress and accessing the curriculum. However, if the need arises to hire an additional ESE teacher(s), that decision will be made based on the needs of the population of students with disabilities.

Consultation provided by the ESE Teacher may include:

² <http://www.fldoe.org/academics/exceptional-student-edu/data/index.stml>

- adjustments to the learning environment
- modifications of instructional methods
- adaptation of curricula, and the use of appropriate accommodations to meet the needs of individual students

ESE teachers will be hired to service students with disabilities, in accordance with the level of support needed to implement the related services and specialized instruction detailed on the IEP.

The school will employ teachers who meet all licensure and/or certification requirements that apply to the area in which the individuals are providing services to the special education students, or contract out for services as needed. Speech-language, occupational, and physical therapy services will be contracted services that the School may provide for students who qualify for those services. Similarly, all personnel who provide related services (e.g. psycho-social counseling will be provided by a psychologist, social worker or mental health professional, etc.) to students will meet all required licensure and/or certification requirements pertaining to their area of related service.

We recognize the importance of 'front-loading' our special education program as a new charter school, in order to promptly and thoroughly organize our provision of services. In later years, the school will hire additional highly-trained special education faculty, aiming for a ratio of at least one special education teacher to every fifteen to twenty special education students. The school will contract out for specialists in occupational therapy, physical therapy, speech and language therapy, and counseling, as needed. In its first five years, the school will contract with a part-time nurse who will collect and organize student health records, administer medications, and perform any necessary exams (such as vision testing, scoliosis exams, etc.). A full-time nurse may be contracted if there is an inordinate need. The school may also contract with a school psychologist who will provide counseling services for students as determined by the students' IEPs. This psychologist may serve as a liaison to outside services. Faculty advisors will share contact information for a collection of community-based counseling services, to which they may refer interested families.

1. Describe how the school will serve gifted and talented students.

The School recognizes the special needs of gifted learners and is committed to offering programs that provide maximum development of each student's academic talents. Instructional programs for gifted students emphasize acceleration and enrichment based on students' strengths and needs as indicated by their giftedness. The philosophical focus of the gifted program promotes increased access, rigor, and achievement.

Gifted Education Program will emphasize a quantitatively differentiated curriculum based on content, concepts, processes, and applications through products/projects in language arts, mathematics, science and/or social studies. Such a differentiated curriculum provides for in-depth consideration of topics and concepts beyond the requirements of regular courses, and therefore, is designated as an academically accelerated program.

The curriculum for the gifted student assures access to the general curriculum, with emphasis on what the Educational Plan (EP) team determines will offer opportunities for growth for the gifted learner based on the student's strengths and present level of performance. Therefore, the curriculum for gifted students reflects Florida Standards and Next Generation Sunshine State Standards through the implementation of the appropriate Pacing Guides and the Gifted Goals and

Objectives identified in the students' EPs. These include, but are not limited to, the important concepts of: critical thinking, creative thinking, developing independence in learning, personal growth, leadership skills, research skills, and problem solving.

In order to implement the curriculum for the gifted, specific instructional strategies include an effective and differentiated approach designed for the abilities of gifted students. The following curriculum differentiation strategies are in place to ensure that each individual student progresses in the curriculum to the maximum extent appropriate.

- Curriculum Compacting - involves eliminating the repetition of work that has already been mastered and streamlining lessons that can be mastered at a pace commensurate with the student's motivation and ability.
- Independent Study - opportunity for students to pursue areas of personal interest or to individually investigate course topics.
- Enrichment Clusters - learning situations that are purposefully designed to produce a product or service that will have an impact on an intended audience.
- Learning Centers - a physical area of the classroom that is organized with various materials and learning experiences for specific instructional purposes.
- Flexible Grouping - grouping of students according to their learning needs, strengths, and preferences.

A range of service delivery options will be available to meet each gifted student's special needs based on the student's Educational Plan (EP) and will be provided with administrative support to assure adequate funds for materials and professional development. The following delivery models may be available for students:

- **Middle School Gifted Program (6-8)** - offer gifted content area courses (Mathematics, Science, Social Studies, and/or Language Arts/English) and/or State-approved middle school gifted elective courses. All of the students in the gifted course are eligible for gifted services and the teacher is endorsed to teach gifted or on an approved waiver to complete the gifted endorsement.

Instructional Strategies for Gifted -The School will offer various services to meet the needs of the gifted student based on the Educational Plan. These services may include but are not limited to:

- Acceleration: (e.g. enrichment, world immersion activities (i.e. as science and social studies fairs, music and art exhibits, academic competitions, mentoring, career exploration and goal setting integrated into the curriculum);
- Differentiation: (e.g. curriculum compacting, modifications of content through differentiated curriculum); and
- Ability grouping: (e.g. specialized gifted courses, social skills development and/or counseling).

Identification of Gifted Students:

The School will follow Saint Lucie County Public School guidelines and procedures for Students who are Gifted.

For those students who may be gifted, the following procedures will be followed:

1. The screening process for the School includes the development of a talent pool of students who demonstrate unusual ability. Students will be screened using two or more of the following criteria:
 - High academic achievement, as indicated by standardized test 89 percentile or higher or above proficiency in Standardized Assessment Scores (FSA) or course work grades of A or B.
 - Above average creative output in artistic, literary, scientific, or mathematics endeavors
 - Very rapid learning rate or unusually insightful conclusion
 - Multiple nominations from teachers and staff who observe unique talent
 - Parental reports of advanced developmental behavior, such as early reading, verbal precocity and use of complex syntax, or evidence of mechanical aptitude
 - Outstanding academic, creative, or leadership abilities, self-reported or peer-reported.
2. A student profile is developed for a student being referred to the SBT. The student profile includes the following:
 - Gifted Characteristics Checklist- Students need to demonstrate a majority of gifted characteristics on the rating scale to continue in the process; and
 - Information that can be utilized to demonstrate the student's ability and need for gifted program services. This information may include, but is not limited to: standardized test scores (A standardized achievement test is administered to students who do not have Stanford Achievement Test or Florida Standards Assessment scores), Classroom performance indicators such as report card grades, class work, and/or projects.

A SBT meeting is convened in order to review the information gathered in the student's profile. The SBT makes the determination of whether or not to continue the evaluation process, based on the supporting documentation and a majority of gifted characteristics as measured by the Gifted Characteristics Checklist.

Once it has been determined that a student meets the screening requirements to proceed with a gifted evaluation, the gifted coordinator will collect the documentation required for referral and schedule a meeting with the student's parent, teachers, and school psychologist to review the documents and secure parent permission to evaluate the student.

Upon review of the completed evaluation and referral packet, district staff will notify the gifted coordinator of eligibility. If the student is found ineligible, parents will be notified in writing. If it is determined that the student is eligible for gifted services, the gifted coordinator will schedule an EP meeting with the district staffing specialist, the student's parent(s), and a teacher of the gifted to develop an Education Plan (EP). The Gifted Eligibility Determination Form will be used to evaluate placement in the gifted program.

Plan B Referral and Eligibility:

The School will follow the procedures delineated in the Sponsor's "*District Plan to Increase the Participation of Underrepresented Students in the Gifted Program*" as described below:

A referral for gifted education can be made by a teacher, a parent/guardian, or any qualified individual who has knowledge of student's abilities. A student profile is developed for a student being referred to the School Based Team (SBT). The student profile includes the following:

- Gifted Characteristics Checklist - Students must demonstrate a majority of gifted characteristics on the rating scale to continue in the process; and
- Information that can be utilized to demonstrate the student's ability and need for gifted program services. This information may include, but is not limited to:
 - standardized test scores;
 - classroom performance indicators such as report card grades, class work, and/or projects.

An SBT meeting is convened in order to review the information gathered in the student's profile. Based on the supporting documentation and a majority of gifted characteristics as measured by the *Gifted Characteristics Checklist*, the SBT makes the determination of whether or not to continue the evaluation process,

Student Evaluation Procedures

Replicating #5151's Plan to Increase the Participation of Underrepresented Students in the Gifted Program (Gifted Plan B Matrix) utilizes four indicators of giftedness to determine eligibility for students in underrepresented groups:

- The Gifted Characteristics Checklist is used to determine students' verbal, learning, motivational, and social/leadership abilities.
- A variety of standardized academic achievement test data
- Gifted Plan B Matrix depending on the student's grade level.
- To determine the intellectual development of a potentially gifted student, a licensed psychologist will administer an individualized test of intelligence.
- The *Williams Creativity Scale* is used to determine creativity. The *Williams Creativity Scale* is an assessment of creativity completed by the student's teacher. It contains 48-items assessing originality, fluency, flexibility, elaboration, curiosity, imagination, complexity, and risk taking.
- Additionally, all students must display a need for a special program and a majority of the characteristics of gifted children as measured by the *Gifted Characteristics Checklist* in order to be determined eligible for gifted programs.

Eligibility Criteria

To meet eligibility under the *Plan to Increase the Participation of Underrepresented Students in the Gifted Program* (Plan B), a student must obtain a total of nine points in three of the four categories on the matrix scoring system with a minimum score of 112 in the Intelligence Quotient category.

EP Plan Development:

The EP team will meet to develop an appropriate EP plan, which will include:

- A statement of the student's present levels of educational performance that may include, but is not limited to, the student's strengths and interests, the student's needs beyond the general

curriculum, results of the student's performance on State and district assessments, and evaluation results

- A statement of goals, including benchmarks or short-term objectives
- A statement of the specially designed instruction to be provided to the student
- A statement of how the student's progress toward the goals will be measured and reported to the parents
- The projected dates for the beginning of services and the anticipated frequency, location, and duration of these services

The EP team will consider the following during development, review, and revision of the EP:

- The strengths of the student and the needs resulting from the student's giftedness
- The results of recent evaluations, including class work and State or district assessments
- In the case of a student with limited English proficiency, the language needs of the student as they relate to the EP

Timelines for development of the EP include the following:

- An EP is in effect at the beginning of each school year for each student identified as gifted who is continuing in a special program.

An EP is developed within thirty (30) calendar days following the determination of eligibility for specially designed instruction in the gifted program and is in effect prior to the provision of these services.

- Meetings are held to develop and revise the EP at least once every three (3) years for students in grades 6-8
- EPs may be reviewed more frequently, as needed, such as when a student transitions from elementary to middle school or from middle to high school.

EP Participants Include:

- The parents, whose role includes providing strengths of the student, expressing concerns for enhancing the education of their child, participating in discussions about the child's need for specially designed instruction, participating in deciding how the child will be involved and participate in the general curriculum, and participating in the determination of what services the district will provide to the child and in what setting
- At least one teacher of the gifted program
- One regular education teacher of the student who, to the extent appropriate, is involved in the development of the student's EP; involvement may include the provision of written documentation of a student's strengths and needs for review and revision of the subsequent EPs
- A representative of the school district (staffing specialist) who is qualified to provide or supervise the provision of specially designed instruction for students who are gifted and is knowledgeable about the general curriculum and the availability of resources of the school
- An individual who can interpret the instructional implications of the evaluation results; this individual may be a teacher of the gifted, a regular education teacher,
- At the discretion of the parent or the school district, other individuals who have knowledge or special expertise regarding the student, including related services personnel (**Note:** The determination of the knowledge or special expertise shall be made by the party who invited the individual to participate in the EP meeting)

Implementation of the EP

- An EP will be in effect before specially designed instruction is provided to an eligible student and will be implemented as soon as possible following the EP meeting.
- The EP will be accessible to each of the student's teachers who are responsible for the implementation, and each teacher of the student is informed of specific responsibilities related to the implementation of the EP

Section 7: English Language Learners

- A. *Describe how the school will comply with state and federal requirements for serving English language learners, including the procedures that will be utilized for identifying such students and providing support services.*

The School will adhere to all applicable provisions of Federal law relating to students who are English Language Learners (ELL), including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974. *Note: The ELL Plan, as referenced herein, reflects current policies and procedures adopted by the Sponsor. The School hereby agrees to adopt and implement the Sponsor's policies and procedures with respect to the ELL Plan, as amended from time to time.

The School will follow the St. Lucie County Public Schools' District ELL Plan* and will abide by the requirements of the LULAC et.al. vs. State Board of Education Consent Decree (1990), which is the framework for compliance with federal and state laws and also addresses the civil rights of ELL students with regards to Identification and assessment, equal access to appropriate programming and categorical and other programs for ELL students, personnel, monitoring issues, and outcome measures.

To that end, the School will service the English Language Learner (ELL) student populations as follows:

Identifying English Language Learners (ELL) Students: The School will survey ALL parents upon initial entry (registration) using the Home Language Survey (HLS). This is required by the League of United Latin American Citizens (LULAC) et al. v. State Board of Education Consent Decree. The Home Language Survey includes three questions and is given at the time of registration. The questions are as follows:

1. Is a language other than English used in the home?
2. Did the student have a first language other than English?
3. Does the student most frequently speak a language other than English?

If a parent answers "yes" to one or more of the three aforementioned HLS questions, then the student is assessed in English. Initial ELL testing is to be completed within first ten days of entry in the school, using the following assessment:

- Comprehensive English Language Learning Assessment (CELLA) Online Assessment will be administered to students who have at least one affirmative response on the HLS
- **The school may also administer the OLPS-R**, which is also another acceptable assessment for charter schools. In this case, the IOWA Reading and Language tests will be administered to students scoring a level 5 on the OLPS-R.

- For secondary students a programmatic assessment for mathematics will be given if the student places in ESOL 1-4.

ESOL Program Placement: The School will provide ESOL instruction in English and ESOL instruction in the basic core subject areas in accordance with the guidelines and procedures outlined by the current SLCSB ELL Plan.

Program instruction will be designed to develop the student's mastery of the four language skills, including listening, speaking, reading, and writing, as rapidly as possible.

If the school has 15 or more ELL students speaking another language (per language group) other than English upon registration, the school will ensure that a linguistically qualified teacher or paraprofessional will be staffed to assist ELL students in understanding content instruction. (LULAC et al vs. School Board of Education Consent Decree). Teachers and paraprofessionals assigned to this program are expected to assist

ELL students using their home language in the core subject areas of mathematics, science, and social sciences. Bilingual paraprofessionals will assist students through the use of the following:

- working in small groups
- translating information
- interpreting test questions and homework assignments as appropriate

Content-area instructional delivery models will include:

- BCC (Bilingual Curriculum Content/Optional)
- CCE/ESOL (Curriculum Content in English Using ESOL Strategies)

Students identified as ELL will be placed in **two** English language courses as applicable to the grade level and language proficiency, as follows:

A student identified as ELL will be placed in **two** ESOL courses (meaning one course as required for the student's grade level and one course required based on the student's language proficiency) as applicable to the student's grade level and language proficiency:

1. Language Arts content course scheduled by grade level:

M/J Language Arts 1 Through ESOL

M/J Language Arts 2 Through ESOL

M/J Language Arts 3 Through ESOL

2. Language proficiency course scheduled by English Proficiency Level:

M/J Developmental Language Arts Through ESOL (Level 1 Reading)

M/J Developmental Language Arts Through ESOL (Level 2 Reading)

M/J Developmental Language Arts Through ESOL (Level 3 Reading)

M/J Developmental Language Arts Through ESOL (Level 4 Reading)

*If levels need to be combined, the *Developmental Language Arts Through ESOL* placement may be in the best combination of mixed language level courses (ESOL levels I through IV- I/II; III/IV). The School will implement an ESOL program of instruction in meeting the needs of the ELL population to be served.

Providing Support Services: English Language Learners will receive instruction which is comprehensible, equal and comparable in amount, scope, sequence and quality to the instruction provided to English proficient students. All teachers will identify ELL students and their respective ESOL levels to enable delivery of comprehensible instruction, for mastery of state standards. All teachers will utilize ESOL strategies (which they will document in their lesson plans) as well as alternative assessments appropriate for ELL students. Teachers will also utilize grading guidelines and report card comments as appropriate for ELLs. The School will follow guidelines detailed in the Sponsor's Student Progression Plan, at minimum, as applicable to ELL students, for appropriate grade level placement, promotion, and graduation requirements of all students including ELL students.

Administrators will be responsible for monitoring the implementation of strategies by the classroom teacher using the classroom walk-through model. Evidence can be observed during classroom visits, through lesson plans, through use of materials and audiovisuals, and through grade book notations. All teachers of ELLs document the ESOL strategies used for each lesson in their lesson plans. Some of the ELL Strategies to assist ELLs include but are not limited to the following:

- **Identifying Similarities and Differences** - Mind mapping, Venn diagrams, T Charts, Cause and Effect Organizers, Word Sorts
- **Cooperative Learning** - Group Projects, Language Experience Approach, Shared Reading and Writing, Book Pass, Dramatizations
- **Nonlinguistic Representations** – Pictures, Manipulatives, Concept Maps, Student Drawings Mnemonic Clues, Visualization, 5 Senses Organizer
- **Questions-Cues-Advanced Organizers** - Activate background knowledge, Front-load key vocabulary, Predicting, inferencing, concluding, Reciprocal teaching and modeling, Think alouds and guided questions, KWL
- **Home learning and Practice** - Lesson opening with review and preview, Metacognition of strengths and weaknesses. Reflective journals, Sharing goals and objectives with parents, Praise efforts to use English, Hold high expectations, Honor individual learning styles, Use authentic assessment.
- **Resources:** Word-to-Word dictionaries in the students' heritage language/English language will be available in the ESOL and Content classrooms throughout the year, as well as, for all district and state assessments.

Furthermore, the School Principal will commit to providing instruction to ELL students in equal amount, sequence and scope, as to non-ELL students, by ensuring:

- The same program goals and objectives for ELLs as non-ELLs exist (content of basic subject area courses is the same in scope, sequence and quality as the instruction provided to non-ELLs)
- Teacher classroom goals and objectives are for mastery of standard
- Instructional delivery, not content, is modified to meet the needs of ELLs
- Content area teachers receive appropriate ESOL training, and utilize appropriate ELL strategies when ELLs are enrolled in their classes
- All ELLs participate in statewide assessments – and accommodations are provided in accordance with State and District mandates and guidelines, which may include:
 - English to heritage language dictionary;
 - Flexible setting (parent must be notified prior to testing);
 - Flexible scheduling; and
 - Assistance in the heritage language (as specified in testing manual for each respective section of test to determine level of assistance).
- ESOL Department and Testing Chair attend all required District PDs
- Abide by Student Progression Plan, including provisions for ELL students.

Home Language Assistance Program: If the school has 15 or more ELL students speaking another language (per language group) other than English upon registration, the school will ensure that a linguistically qualified teacher or paraprofessional will be staffed to assist ELL students in understanding content instruction. (LULAC et al vs. School Board of Education Consent Decree). Teachers and paraprofessionals assigned to this program are expected to assist ELL students using their home language in the core subject areas of mathematics, science, and social sciences. Tutoring logs indicating services provided will be kept at the school by the administrator supervising the program.

Bilingual paraprofessionals will assist students through the use of the following:

- working in small groups
- translating information
- interpreting test questions and homework assignments as appropriate
- helping students comprehend textbooks and other written materials.

ELL Plan - All students classified as ELL will have an Individual ELL Student Plan. Such plan is part of the permanent student cumulative record folder upon entry into the ESOL program. The plan will include biographical student information (name, grade, home language) initial assessment and placement data, ESOL program and update information, program participation, amount of instructional time and/or schedule, exit information, post program review, ELL committee information, as well as a Progress Monitoring Plan (PMP) if needed. The plan will be updated on an ongoing basis to include programmatic changes, assessments, level updating, and ELL committee meeting information.

The ELL Plan will:

- Inform the student, parent, and teachers of the student's ESOL language level
- Monitor student progression
- Establish meetings between the school, the parents, and the student to discuss academic progress

- Provide methods for evaluation and provisions for monitoring and reporting student progress
- Provide for parental and teacher involvement to ensure that the students are being properly serviced
- Provide for student exit from and reclassification into the program.
- Provide documentation for post program review for students who have exited the ESOL program

The School will designate an ESOL coordinator to be responsible for developing and updating all Student ELL Plans, keeping a record of parental contact and ESOL Program Records Folder.

Parental Involvement: To promote parent and community participation in programs for ELLs, the school will invite parents to participate in district parent organizations. Parents of ELLs who are, or wish to be, in leadership positions will also be invited to attend local conferences and will be provided translation technology for better understanding.

The ELL Committee: The main function of the ELL Committee is to resolve any issue that affects the instructional program of an ELL student. It is composed of: an administrator or designee, the ESOL teacher/coordinator, the home language teacher (if any), the classroom/subject area teacher(s), and a guidance counselor, or other educators as appropriate for the situation. The parent(s) will be invited to attend any meeting of the ELL Committee.

The ELL Committee will:

- Review instructional programs or progress.
- Address parental/teacher concerns.
- Review instructional program of former ELL (LF) students during the 2-year post-reclassification period with consistent pattern of academic underperformance.
- Handle Reclassification of former ELL.
- Review academic progress for Extension of ESOL services.
- Review all available data to consider exiting a student out of the ESOL program.
- Request evaluations/support from SST/RtI
- Schedule meetings to review the student's progress and make recommendations after thorough review of all necessary data
- Invite parent(s)/guardian(s) to attend all meetings, discuss and explain all recommendations
- Ensure that the parent(s)/guardian(s) understands the proceedings of the meeting, which may include arranging for an interpreter for parent(s)/guardian(s) whose native language is other than English
- Convene meetings in a timely manner and record recommendations in the Individual WLEP Plan
- Maintain an ELL Committee log to detail the date, name of child, reason for convening a meeting, and the outcome of the meeting.

The Student LEP Plan/ELL Plan will be updated annually by the principal's designee/ESOL coordinator.

The Comprehensive English Language Learning Assessment (CELLA): The CELLA will be administered each spring to all current ELL students to measure proficiency and gains in reading, writing, listening, and speaking as follows:

- Criteria used is two exams: CELLA and current state standardized exam or other exam approved by the Sponsor (formerly FCAT 2.0)
- Student must achieve scores at or above the Proficient Level on all four language acquisition components of CELLA
- There are alternate exit procedures as well; however, all must be based on two forms of assessment. That is, the School's ESOL coordinator, in coordination with the teachers, will implement the aforementioned procedures to exit students from the ESOL program.

All ESOL students that EXIT during the school year will need to have an ELL Committee meeting. All relevant sources of data, including the CELLA Online will need to be reviewed by the ELL committee.

The Language Arts teacher will document former ELL student's progress in the student's ELL Plan using a Post-Program Review Report and a Post-Program Review Student Profile are generated with information regarding ELL students who have exited the ESOL program within the last two years. Documentation of the progress review for each ESOL-exited student will be conducted at the end of the student's first grading period, first semester, first year, and second year after exiting. LEP plan will reflect the Student's current Language Arts teacher's employee number at time of monitoring. Post Program Review will be the responsibility of the Language Arts teacher, not the ESOL teacher.

If student is not performing due to language deficiencies, student is referred to ELL committee. A decline of 1.0 in GPA requires ELL Committee review.

The school will monitor the student's progress via:

- report cards
- test scores
- classroom performance
- Benchmark Assessments
- Post Program Review Reports (as applicable)
- Standardized tests (as applicable)
- Student Case Management referrals (as applicable)

This information will assist schools in determining if student's progress as well as the school's effectiveness servicing the needs of its ELL population.

B. Identify the staffing plan for the school's English language learner program, including the number and qualifications of staff.

The (shared employees) high school's Vice Principal, the Academic Advisor, three teachers and two of the office staff persons are multilingual and will be instrumental in facilitating for caretakers/ parents. Staffing and hiring of teachers and support staff will be based upon the number of students who enroll, according to registration and screening. All faculty shall be included in the ESOL identification plan for all students. The guidance team shall work with each individual teacher to screen students who are identified. The administration shall work with the faculty to ensure progress toward ESOL certification requirements and to assist in program implementation

for student assistance. During the hiring process, potential staff will be evaluated not only on their content area of certification, but on their endorsement level of ESOL.

The School will ensure that experienced and ESOL certified teachers, as appropriate, will be hired to serve the School's English Language Learner Program, based on students' proficiency levels. The number of teachers will be based on the number of students identified upon student enrollment (results from home language surveys and/or ESOL levels). Additionally, the School is committed to ensuring that all core curriculum personnel instructing ELL students receive the appropriate training.

The school will identify an ESOL coordinator who will have the responsibility of overseeing, training, and assisting staff in meeting the needs of the school's ELL population throughout the school year.

All instructional members will be trained and expected to:

- identify the students in their grade book and record the ESOL level next to each student's name;
- use appropriate lessons and reflect ESOL strategies being used in lesson plans; and
- use appropriate grading guidelines and report card comments.

Additionally once the School has 15 or more ELLs who speak the same language, the School will employ a bilingual paraprofessional or teacher, as required. Teachers and/or paraprofessionals assigned to this program will be expected to assist ELL students using their home language in the core subject areas and providing instructional assistance in the classroom to ensure the delivery of comprehensible instruction for the ELL students.

Bilingual paraprofessionals will assist students through the use of the following:

- working in small groups,
- translating information,
- interpreting test questions and homework assignments as appropriate, and
- helping students comprehend textbooks and other written materials.

The ESOL program coordinator, who will serve as a staff contact person, will have the responsibility of overseeing/assisting staff in meeting the needs of the School's ELL population throughout the school year.

Professional Development - The School will offer on-site staff development opportunities for all staff to acquire the ESOL endorsement. The Principal/Staffing Committee will identify each teacher's training status or requirement. The School will work to provide ESOL in-service training program(s) to assist language arts, basic subjects and other subject area teachers. The School will work with its Sponsor in informing staff of the sessions or web-based courses available to meet the ESOL/META training requirements.

C. Explain how English Language Learners who enter the school below grade level will be engaged in and benefit from the curriculum.

The School curriculum is designed to serve students of all ability levels, and the School will ensure that all students will be engaged in and benefit from the curriculum, including English Language

Learners who enter the school below grade level. Any student in need of remediation for not making adequate progress towards mastery of the Florida State Standards will have access to supervised study time and tutoring services during school and non-school hours (e.g. after school, Saturday mornings, etc. and whenever possible, to accelerate and/or remediate student achievement).

Apart from providing the specific services listed in the English Language Learner's LEP Plan, the School's faculty will differentiate instruction as necessary, as well as offer tutoring services or other such assistance such as what is offered to non-ELL students, to ensure students are successful. Student performance will be continuously assessed and students not making adequate progress towards mastery of the standards:

- All students not meeting standards will be placed on a Progress Monitoring Plan and specific strategies to remediate any learning deficiencies will be implemented (excluding those ELL students who have been participating in the ESOL program for less than 2 years.) This plan requires active participation from the student, the parents and specific teachers in order to ensure continuous student improvement. This initiative allows each student to have ownership and understating of his/her learning style and allows each student to track and monitor his/her achievement. The PMP will be comprised of specific measurable individualized goals for that student, as well the strategies and services (tutoring/required additional classes) to be implemented in order for the student to achieve the specified goals.
- ESOL/Reading strategies in the content areas will be facilitated throughout the curriculum to provide additional practice in addition to those taught during language arts classes.
- Early bird, after school, Super Saturday, and daily pull-out tutoring may be required for those students consistently demonstrating non-mastery of the standards.
- Students consistently demonstrating non-mastery of Benchmarks on teacher generated quizzes, chapter tests, projects, investigations, and poor academic progress will be targeted for supplemental and intensive instruction/intervention.

Section 8: School Climate and Discipline

A. Describe the school's planned approach to classroom management and student discipline.

The School's philosophy regarding student behavior ensures commitment to the school's mission on a daily basis. The School believes that a safe and orderly school is of primary importance to creating an enjoyable learning environment for both students and teachers. Furthermore, when students behave in a respectful, responsible and safe manner, they enjoy a more productive learning experience and develop into responsible citizens.

Thus, students will be expected to abide by a strict code of behavior. Proper conduct will be recognized and consequences will be given for breaking rules in accordance with the belief that inappropriate behaviors that interfere with the learning process and the expectations set for character development can be reduced and ultimately extinguished through consistent, best-practice behavior management techniques. Whenever necessary and appropriate a child study may be convened to create a plan of action for addressing a learner's behavioral challenges as a means for intervention and assistance rather than mere punishment for repetitive negative behaviors that may be addressed through assistance and intervention.

Students will be taught character education throughout the school year, reinforcing a sense of responsibility in their actions and deeds, thus molding more self-aware, capable individuals. The School expects each parent to take an active role in supporting this plan. It is in the student's best interest that parents and staff work together to ensure a happy, safe and productive learning experience.

The School will abide by the Sponsor's Code of Student Conduct **at minimum (anything not covered in the Somerset COC)**, therein incorporating the district's policies and expectations for students related to, including but not limited to, consistent and timely attendance, respect for persons and property, appropriate dress, technology usage, student publications, student activities, student records, and the right to appeal, including grievance procedures et. al. This information will be made available to parents and students upon registration. Parents are expected to read and discuss the policies with their child/children and return the appropriate form(s) with signatures for the students' portfolio records.

Furthermore, a collaborative problem solving process will be utilized to address learning and/or behavioral challenges identified by the classroom teacher and/or identified by the parent and corroborated by the teacher as an in-school behavior. The School will have a team/Discipline Committee (like a child study team) comprised of a School counselor, a member of the administrative team, and respective department heads e.g. members of the curriculum council (wherein every department is represented) and referring teacher and parent, when appropriate, will meet to discuss the pattern of behavior, targeted potential strategies to aim at assisting the child curtail the undesired behavior or learning outcome. The group will really consider the actual repetitive harmful behavior, and assign targeted strategies and or interventions (including timeframes for implementation and an informal plan of action) will be planned, implemented and

subsequently evaluated at a subsequent meeting. The student's response and the results of intervention will be discussed and further action will be determined based on specific data and results gathered. Through this process, the student's needs can be addressed across the curriculum and the strategies can be individualized as well as the student's needs can be discussed and results compared, with allocation of necessary resources being implemented throughout the school day and in every discipline. The goal of this approach is to assist and support the child, avoiding, whenever possible, the necessity for punitive measures that will interrupt the integrity of the everyday academic or social setting of the child.

B. Describe the school's Code of Conduct, including the school's policies for discipline, suspension, dismissal and recommendation for expulsion.

The school's specific Code of Conduct is as follows:

CODE OF CONDUCT

Somerset College Preparatory Middle School is a college preparatory school.

The school holds its students accountable to the highest level of student conduct. We expect our students to treat others with respect and courtesy. The goal of the Code of Conduct is to assist students in developing self discipline, character and responsibility for our school, the larger community, family and fellow students. The primary objective of this code is to develop each student's potential for learning and to foster positive interpersonal relationships. If this is to be accomplished, it is necessary that the school environment be free of disruptions which interfere with teaching and learning activities. The student's conduct determines to a great extent the full development of his/her potential for learning and the development of positive relationships

CAFETERIA CONDUCT

Running and shouting are considered improper behavior in the cafeteria. Students will proceed through the cafeteria line in an orderly fashion, "first come, first served." Students may not hold a place in line for other students. Students are responsible for cleaning up after themselves, by placing their trash in the proper receptacles and helping to maintain a clean eating environment. Students are not permitted to send out for food and parents are not to have food delivered to the school, unless pre-approved by administration at least 24 hours in advance. Students are to report promptly to their lunch period and are not permitted to leave the designated lunch-time areas without the permission of the supervising faculty. Misconduct in the cafeteria will result in disciplinary sanctions.

MEDIA CENTER CONDUCT

The Media Center is a quiet place for individuals to read, study, research, and receive formal instruction from the librarians or teachers. Open food and drink containers are not permitted in the Media Center. Materials are checked out for a period of two weeks. A replacement fee will be charged for lost or damaged materials. Students with outstanding fees will not be issued final

transcripts and/or report cards. Taking a book without properly checking it out is stealing, and violates the value placed on integrity. Any student stealing books will be held accountable and subject to disciplinary action. Students are expected to be respectful of other students, staff, faculty, materials and equipment in the Media Center at all times. Students using computers must have written consent by parents/care-taker on file. Once Internet Permission Forms are submitted, students will receive an indicator to be placed on student i.d. Students must have student i.d.s displayed when on computers.

USE OF PORTABLE ELECTRONIC DEVICES

Cellular telephones and other electronic equipment may only be used in the school building during school hours when approved by instructional staff and for educational purposes, and will be confiscated if misused. Confiscation will be accompanied by a detention. Cell phones and other electronic equipment that is confiscated will be held for 24 hours and returned only to the student's parents or legal guardian. A student's personal laptop computer may be used in class only with the teacher's permission, after the Academy's IT has implemented the required firewalls and blocks.

Expectation	Rules	Consequences	By who
SCPAMS students will contribute to keeping the campus safe for everyone.	No student shall possess, sell use, or furnish any type of weapon, or dangerous object, including, but not limited to firecrackers, matches, lighters, stink bombs, etc.	Up to and including immediate dismissal	Admin
SCPAMS students are expected to resolve conflicts peacefully, which means reporting potential problems to teachers, counselors, staff, or administration.	No student is permitted to threaten to cause or actually cause physical injury to another. Spectators and instigators will be treated the same as fighters. Bullying is not allowed and will be dealt with strongly.	Up to and including immediate dismissal	Admin

SCPAMS students respect themselves, other students, and all staff at all times.	THE FOLLOWING ARE NOT ALLOWED Disobedience/Disrespect Defiance/Lying Intimidation Profanity/Vulgarity Obscenity Racially inciting statements Sexual harassment Hate crimes	Up to and including immediate dismissal	Admin
SCPAMS is a drug, alcohol and tobacco free learning environment.	No student shall possess, sell, furnish, use, or be under the influence of any alcohol, tobacco, narcotic, or controlled substances. Possession of drug paraphernalia is not allowed.	Up to and including immediate dismissal- Contact Law Enforcement	Admin
SCPAMS students are responsible citizens who respect their fellow students and their school.	THEFT, ROBBERY, EXTORTION, GRAFFITI, VANDALISM, AND PROPERTY DAMAGE ARE NOT ALLOWED: Students are not allowed to steal, attempt to steal, take or damage property of another or any SCPAMS property or equipment.	Up to and including immediate dismissal- Contact Law Enforcement	Admin
SCPAMS students will come to school dressed according to the SCPAMS uniform policy in all aspects.	Students will wear approved SCPAMS uniforms purchased from the designated SCPAMS vendor, with SCPAMS logo.	Parent Phone Call and Unexcused absence until issue is rectified: 10 per year can result in retention	Admin
SCPAMS students will attend all their classes.	Students may not leave campus without written permission and proper identification from person picking up the student	Unexcused absence: 10 per year can result in retention	Admin

Expectation	Rules	Consequences	Who
SCPAMS students are expected to be in class on time.	All students are expected to be in class on time. Entering the classroom late disrupts the educational process as per SCPAMS tardy policy.	1-3: Teacher Detention 3 per class=1 unexcused absence: 10 per year can result in retention	Admin

CONSEQUENCES OF CONDUCT INFRACTIONS

“Up to” can include the following:

- OSS Out of school suspension ISS In school suspension
- ASD After school detention SS Saturday school

Detentions/Suspensions

1. Detentions are held after school for one hour. Students will be given a minimum of 24 hours notice of detention. Detention must be served when scheduled. Students present for any part of a school day will be expected to serve a detention if it is scheduled for that day. Acceptable reasons for missing a detention include student illness or a doctor’s appointment. Written proof of a doctor’s appointment will be required upon the students return to school. If such proof is not provided upon the students’ return, they will be considered to have skipped the detention. Detention takes precedence over any other after school activity or sport.
2. Students who fail to attend detention as scheduled, arrive late to detention, or who are asked to leave detention for misbehavior will be required to make up that detention and will be assigned one additional detention or one Saturday School.
3. Detentions not served in one school year may be carried over to the next school year at the discretion of Administration.
4. Students will be notified of receipt of detentions.
5. Upon receipt of any combination of the eighth (8th) After School Detention or Saturday School, a student shall be liable for dismissal from Somerset College Preparatory Middle School upon recommendation of the Administrative Team. Any student that receives any combination of 9 or more After School Detentions or Saturday Schools and is not dismissed from the school, will be placed on probation for all or part of the student’s remaining school years. The terms of the probation will be recommended by the Discipline Committee and determined by the Principal. The Discipline Committee shall be comprised of 3 faculty members, Principal, Vice Principal and a Board Member. A parent may be asked to participate on the Discipline Committee as long as the

process is blind. Students may also be dismissed from SCPAMS for a single serious offense as determined by the administration and/or the Discipline Committee. Only the Principal, after consultation with Discipline Committee, may ask a student to withdraw from the Academy (mandatory withdrawal). Once a student is withdrawn, their re-admittance in the future will be at the discretion of the Principal.

6. A second suspension during a school year at SCPAMS may result in his/her immediate dismissal from the school.

***Under ordinary circumstances, one or more sanctions may be appropriate. However, a student may be placed on probation for all or part of one school year due to a previous school year's infractions. Students who have been suspended two or more times in a school year will be placed on probation for the first quarter of the following year. Suspensions will be recorded in the student's permanent record, and are maintained on file from year to year.**

RIGHT of SCPAMS STUDENT DISMISSAL

FS 1002.33(7) The admissions procedures and **dismissal procedures**, including the school's code of student conduct, identifies the charter school's authority to develop and implement admission procedures and dismissal procedures.

Rationale for dismissal

Families and students who fail to meet the SCPAMS Board established policies for continued enrollment include:

- Wearing Board approved uniform as designated by time and location and manner as per SCPAMS policy.
- Attendance requirements as per FS 1001.41 requiring a minimum of 170 days of attendance.
- Behavior as per SCPAMS policy.
- GPA Minimum of 2.0 policy

Steps taken prior to dismissal

A. Documentation

1. Document uniform violations and notify parent.
2. Document discipline violations and notify parent.
3. Document parent volunteer hours and notify parent.
4. Document attendance and notify parent.

B. Conferences

1. Refer for Discipline Committee as appropriate.
2. Hold conferences with parents and student regarding violations.
3. Hold dismissal hearing with parents and student.

Dismissal Procedures

1. Letter to parent regarding intent to dismiss and requesting a hearing.
2. Final declaration of dismissal or option of withdrawal.
3. Transfer records to home-zoned school.

The School believes that a safe and orderly school is of primary importance. When children behave in a respectful, responsible and safe manner, they learn more and develop into responsible adults whose "character counts". The Somerset Academy Code of Excellence expects students to be honest, kind, respectful, patient, proud, and courteous.

The Somerset Code of Conduct is a school-wide plan that clearly outlines student expectations. Proper behavior is recognized and consequences are given for breaking the code. In order to ensure a safe and orderly learning environment, Somerset Academy is enforcing stricter standards for its students.

Each parent must take an active role in supporting this plan. We want our children to learn to be responsible citizens. It is in the children's best interest that parents and staff work together to ensure a happy, safe and productive learning experience.

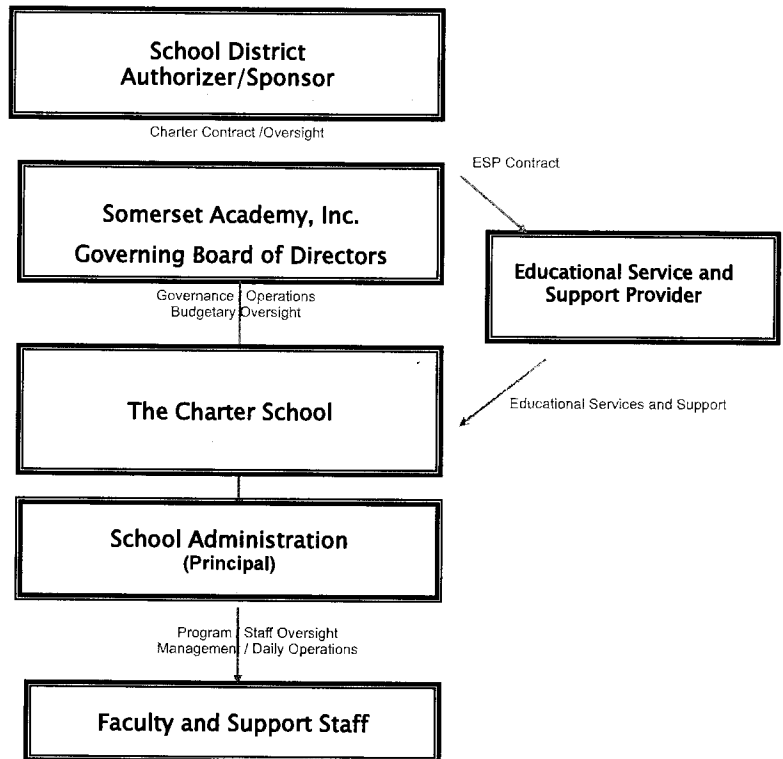
III. ORGANIZATIONAL PLAN

Section 9: Governance

A. Describe how the school will organize as or be operated by a non-profit organization.

Somerset Academy, Inc., a non-profit Florida corporation, is the legal entity that will operate the School as per the *Articles of Incorporation*, (Appendix A) and *Bylaws* (Appendix B). The governing board of directors (the "Governing Board") will have the responsibility for the activities and affairs of the corporation, including management of the school and for providing continuing oversight of school operations. All corporate powers and functions shall be exercised by the Governing Board. The Governing Board is committed to the mission of the school and is cognizant of its responsibility to effectively and properly manage public funds.

B. Provide an organizational chart for the school and a narrative description of the chart. Clearly describe the proposed reporting structure to the governing board and the relationship of the board to the school's leader and administration.



The Somerset Academy, Inc. Governing Board is the ultimate policy-making body with the responsibility of operation and oversight of the school including but not limited to academic

direction, curriculum, and budgetary functions. The school principal, hired by the board, will be responsible for all aspects of school operations within the scope of operating policies and procedures and budgetary functions as adopted and approved by the Governing Board. The school's faculty and staff will report directly to the principal, who shall report to the Governing Board.

The School's on site administration (principal, an assistant principal and/or lead teacher) will ensure that the operations of the School (resources, courses, policies) are in accordance with the mission and vision of the School as adopted and approved by the Governing Board. The administrative staff, as instructional leaders, will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the School. The faculty and secretarial staff will be responsible for carrying out these procedures in their daily activities and interactions with students, parents and the community.

C. Provide a description of how the governing board will fulfill its responsibilities and obligations, including but not limited to:

- o Adoption of the annual budget*
- o Continuing oversight over charter school operations*

The Governing Board is the ultimate policy-making body for the school, and will have the responsibility for the affairs and management of the school. The Governing Board will provide continuing oversight of school operations, including a responsibility to effectively and properly manage public funds.

The Governing Board will fulfill its responsibilities and obligations by performing the following duties, as well as any and all other duties specified in Florida Statutes regarding Governing Boards of Charter Schools and any other duties specified therein the Applicant's Bylaws:

- Oversee operational policies; Academic accountability, and financial accountability.
- Annually adopt and maintain an operating budget.
- Exercise continuing oversight over charter school operations.
- Report its progress annually to its sponsor, which shall forward the report to the Commissioner of Education at the same time as other annual school accountability reports.
- Ensure that the charter school has retained the services of a certified public accountant for the annual financial audit who shall submit the report to the governing body.
- Review and approve the audit report, including audit findings and recommendations
- Monitor a financial recovery plan in order to ensure compliance (if applicable).
- Report progress annually to its sponsor, including at least the following components (i.e. Charter School Annual Report):
 - a. Student achievement performance data
 - b. Financial status of the School, including revenues and expenditures at a level of detail that allows for analysis of the ability to meet financial obligations and timely repayment of debt.
 - c. Documentation of the facilities in current use and any planned facilities for use by the charter school for instruction of students, administrative functions, or investment purposes.
 - d. Descriptive information about the charter school's personnel, including salary and

benefit levels of charter school employees, the proportion of instructional personnel who hold professional or temporary certificates, and the proportion of instructional personnel teaching in-field or out-of-field.

- D. Describe the policies and procedures by which the governing board will operate, including board powers and duties; board member selection, removal procedures and term limits; code of ethics, conflict of interest, and frequency of meetings.
Charter school governing boards must be guided by a set of by-laws that define how the board will operate. Applicants may include their proposed by-laws.*

The Applicant's Bylaws clearly specify the selection, removal procedures, and term limits of Board Members, and is summarized as follows:

Selection: Directors shall be elected at a duly organized meeting of the Governing Board. Notice of the Governing Board's intentions to elect any such Director shall be included in the agenda for that meeting and publicly announced in accordance with Sunshine Law requirements. Newly created directorships resulting from an increase in the number of directors comprising the board and all vacancies occurring on the board for any reason shall be filled by the majority of the members in office at a duly organized meeting of the Governing Board. A member elected to fill a newly created directorship or a vacancy will serve until a successor is elected. Newly elected members will agree to support the founding organization's vision in order to maintain continuity between the founders and the subsequent board members.

Removal Procedures: A Director may be removed without cause by a majority of the Directors then in office.

Term Limits: Each member of the Board of Directors shall have a term of five (5) years and may only be elected for up to three (3) consecutive years. Upon serving the maximum term, a Director's term shall automatically expire without further action of the Board.

The policies and procedures by which the board will operate, including specific board member powers are specifically detailed in the attached Bylaws.

A brief overview of those policies and procedures is as follows:

Board Member Powers: Subject to the limitations of the Florida not-for-profit corporation law, the corporation's Articles of Incorporation and Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board shall have the following powers in addition to any other powers enumerated in the Bylaws and permitted by law

- Select and remove all of the officers, agents and employees of the corporation and prescribe powers and duties for them which are not inconsistent with the law
- To conduct, manage and control the affairs and activities of the corporation
- To adopt, make and use a corporate seal
- To borrow money and incur indebtedness for the purpose of the corporation
- To act as trustee under any trust incidental to the principal object of the corporation, and

- receive, hold, administer, exchange and expend funds and property subject to such trust
- To acquire by purchase, exchange, lease, gift, devise, bequest or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property
- To assume any obligations, and enter into any contracts or other instruments
- To form and be a member or shareholder of a not-for-profit entity organized under the law of any state
- To carry out such duties as described in the Articles of Incorporation and Charter Contract

Board Member Duties: The Governing Board will perform the following duties, as well as any and all other duties specified in Florida Statutes regarding Governing Boards of Charter Schools and any other duties specified in the Bylaws:

- Oversee operational policies; Academic accountability, and financial accountability.
- Annually adopt and maintain an operating budget.
- Exercise continuing oversight over charter school operations.
- Report its progress annually to its sponsor, which shall forward the report to the Commissioner of Education at the same time as other annual school accountability reports.
- Ensure that the charter school has retained the services of a certified public accountant for the annual financial audit who shall submit the report to the governing body.
- Review and approve the audit report, including audit findings and recommendations
- Monitor a financial recovery plan in order to ensure compliance (if applicable).
- Report progress annually to its sponsor

Code of Ethics: It is Board policy that employees and board members uphold the highest standards of ethical, professional behavior. To that end, these employees and board members will agree to commit themselves to carrying out the mission of this organization and shall:

- Be mindful of and honor the safety, health and welfare of the public in the performance of professional duties.
- Act in such a manner as to uphold and enhance personal and professional honor, integrity and the dignity of the profession.
- Treat with respect and consideration all persons, regardless of race, religion, gender, sexual orientation, maternity, marital or family status, disability, age or national origin.
- Recognize that the mission at all times is the effective education of children and the development of institutions to foster that mission.
- Engage in carrying out the Board's mission in a professional manner.
- Collaborate with and support other professionals in carrying out the educational mission.
- Build professional reputations on the merit of services.
- Keep up to date and informed on emerging issues and business of the Board, and to conduct themselves with professional competence, fairness, impartiality, efficiency and effectiveness.
- Uphold and implement policies adopted by the Board of Directors.
- Keep the faculty, parents, students and community informed about issues affecting them.
- Conduct organizational and operational duties with positive leadership exemplified by open communication, creativity, dedication and compassion.
- Exercise whatever discretionary authority they have under the law so as to carry out the mission of the organization.

- Serve with respect, concern, courtesy, and responsiveness in carrying out the organization's mission.
- Demonstrate the highest standards of personal integrity, truthfulness, honesty and fortitude in all activities in order to inspire confidence and trust in such activities.
- Avoid any interest or activity that is in conflict with the conduct of official duties.
- Respect and protect privileged information to which they have access in the course of their official duties.
- Strive for personal and professional excellence and encourage the professional development of others.

Conflict of Interest Policy: As a nonprofit, tax-exempt organization authorized to operate charter schools, the operations of the Applicant can also be viewed as a public trust, which is subject to scrutiny by and accountable to the public. Consequently, a fiduciary duty exists between the Board, officers, management employees, and the public, which carries with it a duty of loyalty and fidelity. The Board, officers, and management employees have the responsibility of administering the affairs of corporation honestly and prudently. Those persons shall exercise the utmost good faith in all transactions involved in their duties, and they shall not improperly use their positions with, or knowledge gained from the organization for their personal benefit.

Nature of Conflicting Interest: A conflicting interest may be defined as an interest, direct or indirect, with any persons or firms mentioned above. Such an interest might arise through:

- Owning stock or holding debt or other proprietary interests in any third party dealing with the Corporation.
- Holding office, serving on the Board, participating in management, or being otherwise employed (or formerly employed) with any third party dealing with the Board.
- Receiving remuneration for services with respect to individual transactions involving the Corporation.
- Using the corporation's time, personnel, equipment, supplies or good will for other than Board - approved activities, programs and purposes.
- Receiving personal gifts or loans from dealing or competing third parties. Receipt of any gift is disapproved except gifts of a value less than \$150, which could not be refused without discourtesy. No personal gift of money should ever be accepted.

Interpretation of this Statement of Policy: The areas of conflicting interest listed and the relations in those areas, which may give rise to conflict are not exhaustive. Conflicts might arise in other areas or through other relations. Directors, officers and management employees will hopefully recognize such areas and relation by analogy. However, it is the policy of the Board that the existence of any conflict of interest shall be disclosed before any transaction is consummated. It shall be the continuing responsibility of the Board, officers, and management employees to scrutinize their transactions and outside business interests and relationships for potential conflicts and to immediately make such disclosures.

Disclosure Policy and Procedure: Transactions with parties with whom a conflicting interest exists may be undertaken only if all of the following are observed: 1. The conflicting interest is fully disclosed; 2. The person with the conflict of interest is excluded from the discussion and approval of such transaction; 3. Where products, goods or services are being procured or sold, that there exists reliable independent evidence of fair value (which shall be specifically identified in and

attached to the minutes), which may include a competitive bid or market survey or comparable valuation or other reliable evidence of market value; and The Board has determined that the transaction is in the best interest of the organization.

Disclosure in the organization should be made to the Board Chair who shall bring the matter to the attention of the Board. Disclosure involving the directors should be made to the Board. The Board shall determine whether a conflict exists and in the case of an existing conflict, whether the contemplated transaction may be authorized as just, fair and reasonable. If the conflict is not deemed to be material and the conflicted party is excluded from the decision making process, then the Board can use its reasonable judgment and make a decision, which it deems to be in the best interest of the entity. The decision of the Board on these matters will rest in its sole discretion, and its concern must be the welfare of the Corporation and the advancement of its purpose.

Meeting schedule selection: A procedure for selection of meeting schedule is clearly written in the Applicant's Bylaws. The Applicant will vote upon and post their meeting schedule for the opening school year, and annually thereafter, in accordance with chapter 119 of the Florida Statutes, relating to public records, and public meetings.

In accordance with 1002.33(7)(d)(2) F.S., the governing board will hold at least two public meetings per school year in the school district. The meetings will be noticed, open, and accessible to the public, and attendees will be provided an opportunity to receive information and provide input regarding the charter school's operations.

- E. List each of the proposed members of the school's governing board, indicating any ex-officio members and vacant seats to be filled. Complete Addendum B (Form IEPC-M1A) for each school currently or previously operated by the Governing Board.*

The following is a list of the members of the school's governing board and a brief description of their backgrounds, skills, and experience highlighting their proposed contribution in servicing as a governing board member. *(Please see completed Addendum B, attached, for additional information on the existing governing board and the schools it operates in the State of Florida.)*

SOMERSET ACADEMY, INC. BOARD MEMBERS

David Concepcion – Director / Chair

Mr. Concepcion has been a part of the Charter School movement, originally serving as Board Member and Chairman of Mater Academy Charter Schools from 2003-2006, and later joining the Somerset Academy Charter Schools as an Executive Board Member since 2006. David worked as the Chief Legislative Aide with the Florida House of Representatives, Mayor's Chief of Staff and City Clerk in the City of Hialeah, FL, and currently serves as the Assistant City Manager and City Clerk at the City of Pacific Grove, CA. Mr. Concepcion has experience in the areas of bill-drafting, presentation of legislation, implementation of legislation among governmental agencies, fundraising, governmental relations, and municipal management. Mr. Concepcion works directly with local constituency and serves as a liaison to the community with the media, state, federal and local agencies. Mr. Concepcion attended the University of Florida, where he obtained a Bachelor

of Arts Degree in Political Science with a specialization in International Relations and Latin American Studies; and is currently studying to obtain his Masters in Public Administration from St. Thomas University.

Lourdes Isla – Director / Vice-Chair

Ms. Lourdes Isla is an accomplished educator with ten years of experience in the field of education. Ms. Isla is currently the principal of Mater Gardens Academy Elementary and Middle Charter Schools, both A+ charter schools in Miami-Dade County. She is responsible for overseeing the daily school operations of 500 students and over 30 staff members. Under Ms. Isla's direction, the schools are ranked among the top third of public elementary and middle schools in Miami-Dade County, achieving Adequate Yearly Progress under Federal standards of the No Child Left Behind Act and earning "A" grades from the Florida Department of Education. In 2014, the school was honored with the distinction of being recognized as one of the countries outstanding public schools by the U.S. Department of Education and awarded designation as a National Blue Ribbon School. Ms. Isla is currently pursuing her doctorate degree in Organizational Leadership from Nova Southeastern University.

Todd German – Director / Treasurer

Todd was born in Augsburg, Germany when his father was serving in the U.S. Army. Raised in Virginia Beach, Todd has been a resident of the Florida Keys for 16 years and has lived in Key West since 1999. As a young man, Todd enlisted in the U.S. Army on his 18th birthday and served in the 82nd Airborne and 7th Special Forces at Ft. Bragg, N.C.

Professionally, Todd is an Investment Advisor and partner in Keys Wealth Management, a private investment management firm. He has previously served as a senior officer for a number of local financial institutions. Since arriving on the island, he has immersed himself in leadership roles in the arts, civic activities and the business community.

Most recently, Todd is the President of the Key West Collegiate School, Vice Chair of the Community Foundation of the Florida Keys, Vice President of the Key West Business Guild and member of the Key West Citizen Editorial Board. In addition, he is the Chairman and spokesperson for Hometown! PAC.

He is the former President of the Montessori Charter Elementary School, Former Chair of the Key West Citizen's Review Board, and former President of the Key West Botanical Garden Society. Todd is a graduate of Leadership--Monroe County, the Key West Ambassador Program and the Key West Citizen's Police Academy.

He holds memberships in all the associations promoting business in Key West--the Attractions, Lodging, Innkeeper's and Realtor's Associations. His daughter Valerie, an Ultra Marathoner, is currently an Internal Medicine resident at Eastern Virginia Medical School.

Ana Diaz, M.S. Elementary Ed. – Director / Secretary

Ms. Diaz has been in the field of education for over fourteen years. She earned her Master's Degree in Elementary Education from the University of Florida and began her career as a teacher

in the Miami-Dade County Public School System. Ms. Diaz continued her studies at Nova Southeastern University where she completed her certification in Educational Leadership. In the fall of 2005, Ms. Diaz began working with Charter Schools and she serves as the Principal of Pinecrest Preparatory Academy Charter School. In addition to supervising the daily school operations, her areas of expertise include curriculum planning, program evaluation, data analysis, assessment design and professional development. Ms. Diaz has been an integral part in the success of the Pinecrest Academy Inc. school organization. Since her election to the Somerset School Board in May of 2013, Diaz has effectively provided oversight and support in her areas of expertise for several of the Somerset Schools and organization.

Raul L. Martinez, Jr.- Director / Parent Representative

As the Deputy Chief of Staff & District Director, Mr. Martinez oversees all district offices operations and work flow. He is responsible for recruiting, hiring, training, and managing district staff; he also represents Congressman Joe Garcia at events; monitors district issues and politics, while conducting staff outreach. Mr. Martinez also develops and implements policy objectives, strategies and operating plans for the Congressman's district offices and directs all activities and staff in the district.

Previously, as the Interim Chief of Staff, Mr. Martinez, was the Member's chief policy advisor. He was responsible for developing and implementing position strategies and operating plans for the Member's offices and managing and directing all activities and staff of the Member's Washington D.C. and district offices including overseeing the office budget. Mr. Martinez acted as the Member's principal liaison and responded to office visits and telephone inquiries from constituents and various interest groups.

As Hispanic Vote Director, Mr. Martinez managed community-oriented, metric-driven program to register, engage and turnout Hispanic voters in support of President Barack Obama's re-election in partnership with field, political, communications, digital, data, voter protection and operations departments. He implemented local capacity-building efforts – developing training materials in English and Spanish, organizing voter education events, engaging community stakeholders as strategic partners in organizing structure and contributed to field program by organizing 100's of Hispanic engagement activities across Florida recruiting over 200 volunteers.

Other positions Mr. Martinez has held include Hispanic Outreach Director for Democracy at Stake, Managing Partner of Martinez Consulting Group, Regional Manager – Prestige Builders Group; Senior Account Manager – Public Relations Agencies and Public Information Officer – Miami-Dade Aviation Dept.

Mr. Martinez earned a Bachelors Degree in Public Relations and Communications from Florida International University and Associates in Arts from Miami-Dade Community College.

Jenny Equijarosa – Director / Parent Representative

Ms. Esquijarosa is a graduate from Florida International University, school of Journalism and Mass Communications. Her background in event planning and marketing makes her a valuable asset to the Somerset Board. Additionally, Ms. Equijarosa is a charter school parent, having served on the Pinecrest Academy Charter School Board. Responsibilities include logistics & production of

dozens of local and nationwide events ranging from private functions of 50 guests, to public events and street festivals of 50,000 consumers. Furthermore, she coordinated marketing, promotional and public relations programs for the live entertainment division, including an exclusive concert series for the Florida Marlins. Ms. Esquijaosa has been with the Somerset Board since 2014.

Tony Morales- Director / Student Alumnus

Tony Morales is a proud alumnus of Somerset Academy Charter High school. Graduating summa cum laude from Broward College, he obtained his Associates Degree and is now currently attending the University of Pennsylvania.

He currently serves as the Chairperson of the Board of Directors for *Under A Tree, Inc.*, a nonprofit that works with educational administrators, postsecondary academics, management consultants, venture capitalists, business leaders, and politicians, to connect diverse student populations with transformational leadership education and high-profile mentorship.

Also the CEO of *Prepory*, he develops college admissions consultancy strategies, including human capital sourcing, international marketing, curriculum crafting, and operations flow formulation.

Mr. Morales serves as Consulting Director for 180 Degrees Consulting, the world's largest nonprofit student consultancy. In that capacity, he leads projects to drive organizational change across clients including Camden City Public Schools in New Jersey and Freire Charter School in Pennsylvania. Previously, he served as Director of Strategy and Analytics and Director of Compliance and Governmental Affairs for Academica Virtual Education.

George B. Ozuna – Director

George B. Ozuna is a Hydrologist with the U.S. Geological Survey (USGS) whose public service has spanned over 30 years. After graduation from the University of Texas at San Antonio with a B.S in Geology in 1980 he was hired by the USGS as a hydrologist in 1981, and assigned to the San Antonio office. Initially, he was a team member for a project collecting and analyzing data on the Edwards aquifer. From 1984 to 1990 he served as a project chief on several different studies that included such work as: monitoring well installation, aquifer testing, evaluating shallow ground-water systems, and describing the surface hydrogeology. In June 1991, he became the San Antonio Water Quality Specialist, assisting the Office Chief in the development of water-quality projects in the office. In 1993, George was selected as the San Antonio Office Chief as Supervisory Hydrologist and 2009 was promoted to a new position as Deputy Director for the USGS Texas Water Science Center. In January 2013 he took on a new position as Senior Program Manager.

George has worked tirelessly throughout his USGS career to apply his hydrologic knowledge and research to address water issues in the San Antonio area. His outreach efforts to the area's predominantly Hispanic community have been a major factor in the link between the USGS and the San Antonio Hispanic community. This is evidenced by his personalized educational lectures to the area schools and communities and his student mentorship program. Frequently, these efforts have been on George's personal time and paid for out of his own pocket.

In his career with the USGS, he continually is involved in diversity efforts; he served as a vocal member of the Ethnic Minority Advisory Committee and actively on the USGS Bureau Outreach and Recruitment Team. As the USGS representative, George served on the committee that prepared the Department of the Interior Hispanic Association of Colleges and Universities (HACU) Memorandum of Understanding. His participation in the diversity programs for the USGS extended the USGS diversity programs goals into his own office and serve as a model of success for all of the USGS.

To his staff, the students he has mentored, the Hispanic community within San Antonio, and his family, George is an extraordinary modest unsung champion. He is a man of integrity in both his professional and personal life. He has sacrificed many opportunities to leave the San Antonio area for career advancement in order to be an active resource to the Hispanic community of his ancestors. He has maintained an honest obligation regarding the science impact of his hydrology discipline that makes a huge difference to the welfare of the Hispanic community where he lives and works. On the job and after work, his colleagues and neighbors admire and respect him as a person that the San Antonio community as a whole and the Hispanic community in particular can count on to always act selflessly on their behalf.

George is widowed after 30 years of marriage to his wife Ninfa and has two children; Andrea, 22, is a graduate of Incarnate Word High School and now a senior at Rockhurst University. Their son Matthew, 21, is a graduate of Central Catholic High School and a junior at University of North Texas.

Louis J. Marin – Director

Louis Marin is the Compliance Officer at Generations Federal Credit Union since June 2013. In that capacity, Marin is responsible for monitoring both Federal and State laws and regulations applicable to Credit Union operations administering loss prevention programs, managing security, vendor management programs and risk management processes. In addition, he serves as the Security Officer for the \$400 million, 48,000 member credit union. A native of San Antonio, Texas, Marin obtained his Bachelor's of Business Administration degree in Accounting from University of Texas at San Antonio in 1981. After an extensive career in the private and public sectors, Marin began working with the credit unions in 2004, where he served as the Vice-President of Project Management, until his currently held position. He is married to his wife Sandra and they have two children; Danielle and James. He serves on several volunteer committees and is a certified Sports Official in basketball, soccer, football and softball.

F. Outline the methods to be used for resolving disputes between a parent and the school.

The school's governing board will appoint a representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes. The representative may be a governing board member, charter school employee, or individual contracted to represent the governing board. The representative's contact information

will be provided annually in writing to parents and posted prominently on the charter school's website if a website is maintained by the school. The appointed representative and charter school principal or director, or his equivalent, will be physically present at board meetings in accordance with 1002.33 (7)(d)(1) and 1002.33(7)(d)(2), Florida Statutes.

Positive relations between the School and its parents and families are a primary concern. For that reason, every effort will be made to handle disputes in the most positive way possible. The following steps have been outlined in order to facilitate resolution of such issues:

- Step 1: Make an appointment to clarify issue with your student's teacher (if applicable).
- Step 2: Make appointment to clarify issue with the school administrator.
- Step 3: Contact Educational Support Provider
- Step 4: Contact Board Appointed Parent Liaison
- Step 5: State concerns at a scheduled Governing Board meeting.

If the school is filing the application in conjunction with a college, university, museum, educational institution, another nonprofit organization or any other partner, provide the following information:

- G. Name of the partner organization. NA*
- H. Name of the contact person at the partner organization and that person's full contact information. NA*
- I. A description of the nature and purpose of the school's partnership with the organization. NA*
- J. An explanation of how the partner organization will be involved in the governance of the school. NA*

Section 10: Management

- A. *Describe the management structure of the school. Include job descriptions for each administrative position and identify key roles, responsibilities and accountability.*

The management structure for the school's day-to-day operations will be as follows:

The Governing Board will hire and oversee the school principal. **The Principal**, as the instructional leader, will be responsible for all aspects of day-to-day administration of the school within the scope of the board's operating policy and in compliance with district, state, and federal guidelines for the school's operation. The Principal will hire, oversee, and evaluate faculty and staff. The principal will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the school including procedures for curriculum and instruction, classroom management, discipline, faculty and staff evaluation, data analysis, testing, support services, parental communication, professional development, discipline, community outreach, oversight of facilities and internal financial controls, etc. The principal will report to the board on the school's operations and finances at minimum at every governing board meeting and will be expected to communicate with the board as often as needed by the School and/or board members in order for school's operational needs to be met.

The administration will implement policies and procedures for the daily operations of the school. The principal will delegate duties to administrative support staff to ensure that daily operations, resources, policies and procedures are being implemented in accordance with the school's mission. Faculty and staff will be responsible for carrying out these procedures in their day-to-day duties, activities, and interactions with students, teachers, and parents of the school.

The duties and key roles for these key personnel are detailed in the job descriptions, Appendix D

The Board expects it will contract with Academica, an Educational Services and Support Provider, to provide off-site support to the school. The support services to be provided are central office functions including but not limited to: assistance with facilities design and maintenance, staffing recommendations and human resource coordination, curriculum support, research and updating, sponsor relations and reporting, program marketing, general accounting services including bookkeeping, payables, asset management, budget preparation, risk management, cash flow analysis, and preparation of financial statements provided to the Governing Board for oversight and approval.

The Sample ESP agreement, in Appendix C herein includes all anticipated professional support services to be provided.

Financial Oversight and Management - The Governing Board has the ultimate responsibility of ensuring that the school's finances are managed properly. As per the duties described in *Section 9-Governance*, the Board will annually adopt and maintain an operating budget and maintain oversight of all school-based finances. The Governing Board will ensure that the charter school has retained the services of a certified public accountant for the annual financial audit. The ESP, as

contracted by the Board, will assist the School with additional preparation and reporting of the school's finances.

The school principal, with support from the ESP, will prepare the estimated budget using anticipated enrollment projections prior to the beginning of each fiscal year. Hiring and procurement decisions will be made at that time. Enrollment will be closely monitored in order to make sure that appropriate master schedules and hiring decisions remain within budgetary constraints. Budget reports will be prepared and presented to the Sponsor and the Board on a monthly basis for oversight. Budgets will be prepared and presented to the Board at all quarterly board meetings.

The board has also established financial policies and internal controls for the school's operational and internal accounts. These policies and controls are detailed in Section 18, *Financial Management and Oversight*, of this application.

B. Outline the criteria and process that will be used to select the school's leader and the process by which the school leader will be evaluated.

The school principal will be hired by the board, and will be responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The Board intends to recruit talented individuals who have knowledge of and experience with instructional, educational, and school-site matters. The school will adhere to the anti-discrimination provisions of s. 1000.05, Florida Statutes.

At minimum, the Governing Board will seek an individual who has:

- extensive administrative and teaching experience;
- State of Florida Educational Leadership Certification;
- experience working with school or advisory educational boards;
- strong managerial capabilities;
- knowledge of the needs of student population;
- positive evaluations from previous administrative position(s);
- letters of recommendation;
- excellent communication skills; and
- demonstrated capacity to meet and or exceed the Florida Principal Leadership Standards

Administrator Evaluations-

In compliance with s. 1012.34, F.S., the administrator's evaluation must, at minimum, be based on the following components:

1. **Performance of students.** *At least* one-third of a performance evaluation will be based upon data and indicators of student performance* This portion of the evaluation will include growth or achievement data of the students attending the school over the course of at least 3 years. If less than 3 years of data are available, the years for which data are available will be used.

*Student learning growth will be assessed annually and measured by statewide assessments using performance standards adopted into State Board Rule for courses beginning in 2015-16. For courses/subjects not measured by statewide assessments, and courses with statewide assessments without a state-adopted growth model, the school will abide by the district's adoption of either all,

some or none of the results of statewide assessments in the performance of students component. (s. 1012.34, F.S.)

2. Instructional Leadership - *At least* one-third of the performance evaluation must be based on instructional leadership. Evaluation criteria for instructional leadership must include indicators based upon each of the leadership standards adopted by the State Board of Education under s. 1012.986, including: performance measures related to effectiveness of classroom teachers, recruitment and retention of effective & highly effective teachers, improvement in the percentage of instructional personnel rated as highly effective & effective, appropriate use of evaluation criteria and other practices that result in student learning growth.

3. Professional & Job Responsibilities - the remainder of the performance evaluation may include, but is not limited to, professional and job responsibilities as adopted by State Board of Education and/or the Governing Board of the school and may also include a mechanism to give parents and teachers an opportunity to provide input into the administrator's performance assessment, when appropriate.

Accordingly, the school will use the FCPCS School-Based Administrator Evaluation System - which meets the above statutory requirements and is aligned to the Florida Principal Leadership Standards, approved by the Florida Department of Education.

The governing board will conduct formal administrator evaluations annually in accordance with s. 1012.34, F.S.

The evaluation systems for school administrators must:

- Be designed to support effective instruction and student learning growth, and performance evaluation results must be used when developing district and school level improvement plans.
- Provide appropriate instruments, procedures, timely feedback, and criteria for continuous quality improvement of the professional skills of instructional personnel and school administrators, and performance evaluation results must be used when identifying professional development.
- Include a mechanism to examine performance data from multiple sources, including opportunities for parents to provide input into employee performance evaluations when appropriate.
- Identify those teaching fields for which special evaluation procedures and criteria are necessary.
- Differentiate among four levels of performance as follows:
 1. Highly effective.
 2. Effective.
 3. Needs improvement or, for instructional personnel in the first 3 years of employment who need improvement, developing.
 4. Unsatisfactory.
- Provide for training and monitoring programs based upon guidelines provided by the department to ensure that all individuals with evaluation responsibilities understand the proper use of the evaluation criteria and procedures.

C. Provide a staffing plan for each year of the charter term aligned with the school's projected enrollment as detailed on the cover page of this application.

See Staffing Plan Tab in Budget

Costs for educational staff and administrators are forecast using the published pay scale in effect in the district where the school is located as a guide. The number of instructional personnel is in line with Florida's laws relating to class size.

- Teacher Salaries were derived at by using an average salary of \$40,500 teacher for Year 1, with a CPI of approximately 2% for every year thereafter.
- Paraprofessionals are budgeted at an average salary of \$ 18000
- Substitute teacher costs assumes that substitutes will be hired for 10 days/full-time teacher at a rate of \$80 day.
- Administrative Salaries include a ½ Principal, \$ 42,500 and an Assistant Principal, on loan from the high school as needed at no cost to the middle school.
- Clerical and Administrative assistant salaries include those for Registrar, Administrative Assistants/Clerical personnel
- Contract Services include professional fees paid to entities such as the Services and Support Provider, Speech Therapist, and other ESE service providers.
- As noted in the detailed Revenue Worksheet included in the application, the budget anticipates that 11% of students will be classified as ESE. There is room in the budget to modify the amount paid for ESE services under Miscellaneous and in the Budget Surplus, should the rate of contracted services for ESE and ESOL increase due to the various needs of the students once enrolled.
- Employee Benefits are calculated at a rate of 22% of all salaries (excluding contracted services). This includes health insurance costs, 401k contributions, tuition reimbursements, Worker's Compensation, and all mandatory federal and state employment taxes. As noted in the application, for employee insurance and benefits selection, the Governing Board has engaged the services of ADP Totalsource, a professional employer organization that provides human resource services to small and moderate size employers. The use of a professional employer organization allows the staff of the School to enjoy the same level of benefits that are available to employees of large organization such as Fortune 500 companies (including health/dental/vision insurance and Retirement/401k plans).

D. Explain the school's plan for recruitment, selection, development, and evaluation of staff.

The qualifications to be required of the teachers and the potential strategies used to recruit, hire, train, and retain qualified staff.

Recruitment – The School will ensure that faculty members are certified, highly qualified professional personnel.

Accordingly, the School will:

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August 2015

- Recruit teachers through the State-sponsored, *Department of Education, Teach in Florida* website, and through teachers-teachers.com
- Coordinate efforts to partner with postsecondary educational institutions to serve as host school for interns whenever possible, and
- Organize other efforts to attract in-field experts to serve as teachers in the various disciplines that require higher levels of academic content delivery.

Recruitment efforts will also include advertisements in local newspapers and on the school's website, presentations and fliers at local universities, school job fairs, and via word of mouth. Considerable effort will be taken during interviews to hire the most qualified candidates that cumulatively represent the diverse racial/ethnic background of the local community and county that we serve.

Selection Process- The school will look for candidates who demonstrate the following qualifications:

Administration

- Educational background: Master's Degree or higher
- Extensive administrative and teaching experience
- State of Florida Certification in Educational Leadership
- Vast experience in working with school or advisory educational boards
- Strong managerial capabilities
- Knowledge of the needs of the student population served by the School
- Positive evaluations from previous administrative position
- Letters of recommendation
- Excellent communication skills

Faculty/Staff

- Educational background: Bachelor's Degree or higher in field
 - State Certification for the required position
 - Excellent presentation and interpersonal skills
 - Satisfactory recommendation and/or evaluations from previous employer
 - Personal characteristics, knowledge, and belief in the school's mission
 - An ability and motivation to work as part of a team in a small-school setting with parental involvement
 - References/Letters of Recommendation

Hiring Process - The School's Governing Board will appoint a screening committee to recruit, interview and recommend to the board qualified candidates for Administrative positions, as needed. This committee may include current charter school administrators, employees of the organization, current board members and ESP personnel. Based on the recommendations of the committee, the Board conducts final interviews of the most qualified candidates and hires the Principal and any assistance principals (as the need arises).

The Principal, once hired, recruits teachers and may appoint a school-based committee to screen highly - qualified and certified teachers. This committee develops an interview questionnaire for

specific positions, conducts initial screening interviews and makes recommendations to the principal. The principal reviews recommendations, conducts final interview, and makes all final hiring decisions within the scope of the budget, as approved by the Governing Board.

The school will not employ an individual to provide instructional services if the individual's certificate or license as an educator is suspended or revoked by this or any other state. The school agrees to fingerprint all employees as required by Section 1012.32, F.S., all employees agree to background checks, and drug-screening. The School will adhere to the antidiscrimination provisions of s. 1000.05, Florida Statutes. Furthermore, the school will not discriminate based on actual or perceived disability, gender, nationality, race or ethnicity, religion, sexual orientation in the hiring of its employees.

Employee Evaluations- In compliance with s. 1012.34, F.S., instructional personnel evaluations must, at minimum, be based on the following components:

1. **Performance of students*** – in accordance with s. 1012.34, F.S., *At least* one-third of a performance evaluation will be based upon data and indicators of student performance. This will include growth or achievement data of the teacher's students.

*Student learning growth will be assessed annually and measured by statewide assessments using performance standards adopted into State Board Rule for courses beginning in 2015-16. For courses/subjects not measured by statewide assessments, and courses with statewide assessments without a state-adopted growth model, the school will abide by the district's adoption of either all, some or none of the results of statewide assessments in the performance of students component. (s. 1012.34, F.S.)

2. **Instructional practice.** *At least* one-third of the performance evaluation will be based upon instructional practice. Evaluation criteria used when annually observing classroom teachers, as defined in s. 1012.01(2)(a), excluding substitute teachers, will include indicators based upon each of the Florida Educator Accomplished Practices (FEAPs) adopted by the State Board of Education. For instructional personnel who are not classroom teachers, evaluation criteria will be based upon indicators of the Florida Educator Accomplished Practices (FEAPs) and may include specific job expectations related to student support.

3. **Other indicators** –the remainder of a performance evaluation may include, but is not limited to, professional and job responsibilities as those recommended by the State Board of Education and/or identified by the approved plan, peer reviews, objectively reliable survey information from students and parents based on teaching practices that are consistently associated with higher student achievement, and other valid and reliable measures of instructional practice.

Accordingly, the school will implement the FCPCS Charter School Evaluation System for Classroom Teachers and Other Instructional Personnel in alignment with the Florida Educator Accomplished Practices (FEAPs) and in compliance with s.1012.34, F.S.

All teachers will be formally evaluated on an annual basis. Newly hired teachers (new to the district and/or new to the profession) will be formally evaluated at least twice in the first year of teaching and will be under a probationary contract. All personnel must be fully informed of the

criteria and procedures associated with the evaluation process before the evaluation takes place. Instructional personnel and administrative personnel who have been evaluated as less than effective must participate in professional development programs as part of the improvement prescription (s. 1012.98, F.S.)

The CWT (Classroom Walk -Through) Program will be used frequently to provide feedback on objective - setting, grade level appropriateness of lessons, appropriate higher-level thinking strategies and appropriate use of texts and materials. Instructional strategies, classroom management skills, and engagement of learners in the classroom will also be observed and teacher performance will be evaluated as a means to inform instruction and provide for professional growth opportunities.

Non-instructional staff, such as clerical staff will also be evaluated and receive feedback on their performance via in-house assessment tools and individual conferences with the principal or designee.

The evaluation systems for school instructional personnel must:

- Be designed to support effective instruction and student learning growth, and performance evaluation results must be used when developing district and school level improvement plans.
- Provide appropriate instruments, procedures, timely feedback, and criteria for continuous quality improvement of the professional skills of instructional personnel and school administrators, and performance evaluation results must be used when identifying professional development.
- Include a mechanism to examine performance data from multiple sources, including opportunities for parents to provide input into employee performance evaluations when appropriate.
- Identify those teaching fields for which special evaluation procedures and criteria are necessary.
- Differentiate among four levels of performance as follows:
 - 1.Highly effective.
 - 2.Effective.
 - 3.Needs improvement or, for instructional personnel in the first 3 years of employment who need improvement, developing.
 - 4.Unsatisfactory.
- Provide for training and monitoring programs based upon guidelines provided by the department to ensure that all individuals with evaluation responsibilities understand the proper use of the evaluation criteria and procedures.

Staff Development Plan - In setting high expectations for both students and teachers, the School will be committed to maintaining the level of high quality instructors by implementing a comprehensive professional development plan. The school will support the professional development needs of all professional staff by subsidizing college classes, facilitating the attainment of continuing education credits, and offering trainings.

Teacher training will be offered throughout the school year in a variety of forms. Select teachers will attend local, state and national conferences and serve as trainer to the remainder of the staff

upon return to the School. Appropriate and relevant school wide training will occur on teacher planning days as well as on early release dates. All staff will participate in school-initiated and other relevant and necessary workshops for professional development, and a member of the administrative team will coordinate, assist and monitor the staff development process. In-house workshops and meetings will be held monthly by administrators and may occur as often as biweekly through team leaders, in order to facilitate support, encourage communication, allow for team planning, and troubleshoot concerns and needs.

All Staff will be offered, at minimum, the following school-site and district-based trainings:

- Curriculum Implementation by Subject/Specialty – Teachers will participate in school-wide trainings and individual department trainings throughout the school year related to curriculum implementation, Florida Standards and FSA implementation - These include but are not limited to: *Horizontal and Vertical team planning, CollegeBoard's SpringBoard Training, Implementing Florida Standards in English/Language Arts and Mathematics instruction.*
- Comprehensive Research-Based Reading Plan Implementation and Instructional Reading Strategies Across The Curriculum
- Differentiated Instruction – This training teaches teachers and coaches how to differentiate and individualize instruction in order to create effective targeted instructional lessons and tutoring to increase student achievement and maximize instructional time.
- Data-Driven Decision-Making – Administrators and staff learn how to analyze, extrapolate and disaggregate school data from a variety of sources and to use this data to create effective school improvement plans and increase student achievement.
- PS RtI MTSSS Framework – Staff learn to create RtI Leadership team that utilizes the Problem-Solving (PS) model to meet the academic and behavioral needs of all students.
- Technology for the Next Generation – Staff will participate in hands-on technology workshops to learn how to integrate technology into the classroom. The purpose is to ensure schools are growing with technology to ensure students and teachers are prepared for the expectations of the 21st century and national technology standards.
- Interactive White Board Trainings: Beginner/Intermediate
- Safety and Security – Safety and security training will instruct staff on daily safety procedures, and how to prevent and protect the school and students, to handle emergency situations, and to recognize potential threats in accordance with the school safety plan.
- Deliberate Practice Plan (DPP) –In addition to school wide professional development opportunities, faculty members will each complete an Deliberate Practice Plan (DPP) (formerly known as Individual Professional Development Plan (IPDP)) as a means to document and identify areas for personal targeted professional growth, including the identification of strategies for obtaining specified goals, its' compatibility to ensuring the professional development exercise will serve to benefit the student, and a timeframe in which the staff development exercise should occur. All DPPs will be approved by the Principal, or designee, at such time the principal may elect to recommend additional recommended professional development that should occur within a given timeframe. The principal or member of the administrative staff, together with the teacher, will commit to the IPDP, including the allocation of necessary resources for plan implementation, and observation of new/struggling teachers by veteran/mentor teachers to implement support strategies.

The professional development plan for administrators will encompass both internal and district-based in-service trainings. Administrators may also participate in professional development conducted through: the National Association of Secondary School principals; the National Association of Elementary School Principals; the Southern Association of Colleges and Schools/AdvancEd; Association for Supervision and Curriculum Development; and state trainings.

At a minimum, administrators will be encouraged to participate in the following professional development trainings and conferences:

- Florida Annual State Charter School Conference - administrators will attend state conference on an annual basis.
- Clinical Educator Training –This training provides quality support for developing administrators for the classroom or other educational environments such as the student services area. The Clinical Educator Program is designed to assist experienced educators as they exercise the very critical task of supporting and mentoring developing professionals in a variety of settings. This course helps develop skills for coaches and mentors in a formative observation, clinical supervision, feedback skills, and professional development planning for increased instructional effectiveness. The Florida Performance Measurement System’s formative and summative processes are incorporated.
- Teacher Formal Observation for Principals: Training is provided by the Florida Consortium of Charter Schools
- Classroom Walk-through Training - Provides school leaders with strategies and tools to effectively structure classroom visits and follow-up reflection. Reflective thinking about one's practice provides an effective strategy for change and improvement by fostering a process of communication between the instructional leaders and the teacher to increase the focus on student achievement. The process provides a powerful strategy for increasing student achievement; a strategy for classroom visits that focuses on teaching and learning; methodology for analyzing the classroom for feedback purposes, and the use of reflective conversation for providing feedback.
- Budget Training for Administrators – This training addresses school budgeting as it pertains to both the school’s operating budget and internal accounting policies and procedures, *Financial and Program Cost Accounting and Reporting for Florida Schools* (Redbook) requirements, and checks and balances to ensure a sound budget.
- Master Scheduling for Administrators – Administrators are trained on creating an efficient and effective master schedule that meets the national, state and district course requirements, is financially sound, and that meets class size requirements.
- Developing the School’s Improvement Plan – This training assists school administrators to develop a sound and effective school improvement plan to ensure an equitable and high-quality school improvement plan. This process includes data analysis, goal-setting, budget planning, professional development planning and reflective practices.

- Principal Chat Sessions – Charter School Administrators meet by level (secondary, elementary) to go over pertinent topics and to share best practices. These sessions include curriculum development, standards implementation, scheduling, educational changes, innovative programs, and more. Experienced administrators share their best practices for using student achievement data with newly appointed assistant principals.

Retention of Staff: The School wishes to provide the best benefits and employee services possible. Our experience has shown that when employees deal openly and directly with supervisors, the work environment can be excellent, communications can be clear, and attitudes can be positive. We believe that the School will amply demonstrate their commitment to employees by responding effectively to employee concerns.

A number of the programs (Social Security, workers' compensation, and unemployment insurance) cover all employees in the manner prescribed by law. Additionally, the school will provide a wide range of benefits such as Flexible Benefits Plan; Direct Deposit; Retirement/401(k) Savings Plan; Bereavement Leave; Dental Insurance; Family Medical Leave; Financial Counseling; Health Insurance; Holidays; Life Insurance; Long-Term Disability; Sick Leave; Vision Care Insurance to ensure the retaining of qualified and capable staff. These fringe benefits are reflected in the budget – See Appendix F.

Other programs may include:

Educational Assistance/Tuition Reimbursement: The School recognizes that the skills and knowledge of its employees are critical to the success of the institution. The educational assistance program encourages personal development through formal education so that employees can maintain and improve job-related skills or enhance their ability to compete for reasonably attainable jobs within the School. The following criteria will be used for Tuition Reimbursement for Full-time Certified Teacher Employees:

3-12. Educational Assistance

1. All full-time certified teachers shall be eligible to receive tuition reimbursement for up to twelve (12) graduate semester hours, per contract year, from an accredited institution of higher learning at a rate not to exceed \$150.00 per semester hour, up to a total of 36 graduate semester hours leading to an advanced degree in subject field.
2. The period in which the twelve hours may be taken extends from the fall term to the succeeding fall term for the particular institution the employee is attending. Tuition reimbursement shall be limited to:
 - a. Graduate level courses leading to a Master's Degree, Specialist Degree, or Doctorate Degree in the teacher's subject area.
 - b. Undergraduate and/or graduate level courses leading to state certification in a subject area designated as critical staff shortage area.
 - c. Graduate level courses in the teacher's subject area, in the event the teacher's Master's Degree, Specialist Degree, or Doctorate Degree is not in his/her subject area.
 - d. Graduate level courses leading to state certification in Educational Leadership are subject to additional requirements and approvals.

- i. Employee's wishing to submit Educational Leadership, or any Leadership degree program coursework for reimbursement must apply prior to beginning the program.
 - ii. The application process begins with the approval of the Principal at our School.
 - iii. Approval for reimbursement will be based on school needs
 - iv. A minimum of 3 years teaching experience is required. In addition, one (1) year must have been at an Academics School.
 - v. All evaluations must be excellent.
 - vi. If you are a teacher in a Middle/High School, you must have a Master's in field prior to applying for Leadership reimbursement.
3. Teachers receiving reimbursement must have obtained a "B" average or better in the course(s) for which reimbursement is expected.
 4. In order to receive reimbursement, receipt(s) for paid tuition and official transcript(s) shall be submitted to the Human Resources Department upon completion of the course(s), along with the completed tuition reimbursement request form.
 5. Request for reimbursement must be submitted within 90 days of completion of the course. You must provide the tuition reimbursement request form, transcripts and a copy of the paid receipt.

Please note, you will not be reimbursed for parking decals, etc.

Employee Assistance Program: The School cares about the health and well-being of its employees and recognizes that a variety of personal problems can disrupt their personal and work lives. Through the Employee Assistance Program (EAP), the school will provide confidential access to professional counseling services for help in confronting such personal problems as alcohol and other substance abuse, marital and family difficulties, financial or legal troubles, and emotional distress

Flexible Spending Account (FSA): A Flexible Spending Account (FSA) program that allows employees to have pre-tax dollars deducted from their salaries to pay for eligible out-of-pocket expenses. The pre-tax contributions made to the FSA can be used to pay for predictable non-reimbursed health care expenses and dependent care expenses during the plan year. Through the FSA program, staff can reduce taxable income without reducing real income, in order to keep more of the money they earn.

Support for Beginning and Struggling Teachers: Observation of new and struggling teachers by veteran teachers and support strategies will be implemented as applicable. A new educator support system format will also be used as a means to offer support to beginning teachers, through the assigning of a willing mentor, who will be assigned for struggling and/or beginning teachers.

Section 11: Education Service Providers

If the school intends to enter into a contract with an Education Service Provider (ESP)³:

A. Describe the services to be provided by the ESP.

The ESP's services include assistance with facilities design, staffing recommendations and human resource coordination, curriculum development, research and data updating, sponsor relations and reporting, program marketing, and bookkeeping, budgeting, and financial forecasting, provided to the Governing Board for its oversight and approval.

B. Provide a draft of the proposed contract between the school and the ESP including, at a minimum, proposed services, performance evaluation measures, fee structure, renewal and termination provisions, and terms of property ownership (real, intellectual and personal).

A sample contract that would be negotiated between the School and the ESP is included herein as *Appendix C Sample ESP Agreement*.

Additionally, the board will conduct a performance evaluation of the ESP on an annual basis to measure the service levels provided by the organization. The evaluation is grouped by area or specialty of service provided by the ESP and using a rating scale ranging from 1 (unsatisfactory) to 5 (highly effective). The Boards reviews this evaluation as a means of determining service improvement, satisfaction with services and ESP contract renewal.

C. Unless the ESP is the parent non-profit organization, explain why the ESP was selected, including what due diligence efforts were conducted to inform the selection and how the relationship with the ESP will further the school's mission.

The Board analyzed data regarding several ESP's currently working with charter schools in Florida and concluded that the ESP chosen offered the most competitive price and had a proven track record of success.

The ESP is one of an affiliated group of charter school service and support entities, which compose one of Florida's longest serving and most successful charter school service and support organizations. Currently working with over 120 charter schools, in Florida and throughout the country, the ESP's mission is to facilitate the vision of the School's governing board by providing

³ An Education Service Provider (ESP) is an organization that provides comprehensive services to a school. Organized as non-profit or for-profit companies, ESPs generally fall into two categories:

- *Educational Management Organizations (EMOs)* that provide comprehensive school management services and may provide school designs and/or educational programming as well, and
- *Comprehensive School Design Providers* that offer a replicable school model or common pedagogical, instructional and governance approach.

the services and support necessary to allow each school to fulfill its mission.

The ESP was selected for the following reasons including, but not limited to:

- ✓ The company is staffed by professionals and educators with extensive knowledge of and experience with Florida Charter Schools.
- ✓ The president of the ESP, Fernando Zulueta, is a founding Board Member of the Florida Consortium of Charter Schools, and a Board Member of The National Alliance for Public Charter Schools. Mr. Zulueta has received numerous awards for his work with charter schools including the "Cervantes Award" sponsored by Nova Southeastern University for significant efforts to support excellence in the education of Hispanic students.
- ✓ The ESP's affiliated group serves the largest number of high-performing (HP) schools of any charter school service organization in Florida. (See evidence in Addendum C)
- ✓ The ESP's affiliated group was the first charter school service and support entity in Florida to seek SACS/AdvancED accreditation for the schools it serves, and all of the schools it serves are either fully accredited or in the process of obtaining accreditation. For example, Somerset Academy, Inc., one of the charter school networks serviced by the ESP, was the first charter school system in the Nation to receive District Accreditation from SACS/AdvancEd. Mater Academy, Inc., another charter school network serviced by the ESP, was also awarded District Accreditation from SACS/AdvancED.
- ✓ The White House's College Opportunity Agenda & the Harvard Graduate School of Education has invited the administration of Mater Academy Charter Middle/High, a charter school serviced by the ESP, to be part of a select gathering of thought leaders and decision makers focused on increasing access to college for all Americans. The school was presented with an Inspiration Award from the College Board for being one of the three most inspiring secondary schools in America.
- ✓ The exemplary academic performance and fiscal soundness achieved for its charter school clients by this service and support organization has resulted in 15-year charter renewals for all schools which have had initial contracts completed. (see evidence in Addendum C)

D. Explain the ESP's roles and responsibilities for the financial management of the proposed charter school, if applicable, and the internal controls that will be in place to guide this relationship.

The ESP will conduct general accounting services including bookkeeping, purchasing support, payables, asset management, budget preparation, cash flow analysis, and preparation of interim financial statements and assistance with the work of the school's independent certified auditor. The school principal/administrator is responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The ESP, contracted by the board, will work with the school principal to provide financial forecasting services to the Governing Board for its oversight and approval.

The principal will prepare a school-site budget, report at least quarterly to the Governing Board on the progress of the site-based budget. The ESP will assist the Board and the principal in developing a budget that will be supportive of an optimal educational experience for students, while maintaining fiscal soundness and accountability. The principal maintains authority to make the

hiring and spending decisions, which affect the budget. The ESP's role is to monitor the budget and advise the school and Board on how to remain fiscally sound.

Accounts- State funds are received by the district/fiscal agent. The district/fiscal agent then wires the funds directly to the school's account. The ESP does NOT receive said funds. The ESP will simply process school invoices relating to daily operations. The accounts payable clerk will code invoices per the "Red Book", verify the accuracy of the invoice, and send the invoice to the school principal for approval. The school's internal fund accounts will all be maintained at the school site under the direction of the school administrator. These accounts will be reconciled monthly by the school treasurer.

E. Unless the ESP is the parent non-profit organization, explain how the governing board will ensure that an "arm's length," performance-based relationship exists between the governing board and the ESP.

The Governing Board will ensure that an "arm's length " performance-based relationship exists between the governing board and the ESP as described in the questions above. The ESP is hired by the Board of the non-profit organization that governs the charter school to perform specific duties, at the discretion of the Board. The ESP does not manage the day-to-day operations of a school, but rather provides "back office" support for the Board through a team of individuals with expertise in the areas of business, law, facilities, quality assurance, strategic planning and development, and governmental compliance. The ESP charges a flat annual fee per student enrolled at the school.

The ESP was established as a for-profit entity, similar to most organizations or vendors that provide services to public school districts and other charter schools (i.e. law firms, accounting firms, software companies, speech therapy agencies, educational materials vendors, uniform companies, etc.).

The Boards annually evaluates the ESP, as described above, and determines continuation and renewal of services based on the ESP's performance. The ESP is hired by the Board to provide certain services, which support the operations of the school. The principal, as the leader, is the individual responsible for the day-to-day operations of the school. Both the ESP and the principal report to the Governing Board, which has the ultimate authority to hire and fire them. Although the ESP may provide support and guidance to principals, it does NOT hire these individuals. They are hired and report directly to their Governing Boards. The ESP does not sign off on annual performance evaluations for principals or staff.

The ESP does not establish or implement a school's curriculum. The ESP does, however, assist the Board and the school in developing their own curriculum by providing them with the resources and tools for research and development, strategic planning, and sharing of best practices of other successful charter schools.

F. Provide a summary of the ESP's history, including its educational philosophy and background and experience of senior management.

Academica is one of the Nation's most experienced and successful charter school service and support organizations. Founded in 1999 on the principle that each charter school is a unique educational environment governed by an independent board of directors that best knows the right path for its school, it is Academica's mission is to facilitate that governing board's vision. Academica has a proven track record of developing growing networks of high performing charter schools. (See Addendum C).

As one of the longest-serving and successful charter school service and support organizations in the nation, the company serves more than 120 charter schools in Florida, California, Nevada, Texas, Utah, and Washington D.C. providing educational programs from pre-kindergarten through high school.

In Florida, Academica schools have been recognized on a local, state, and national level for their achievements. For example, the Somerset Academy and Mater Academy Schools were recently designated by the Southern Association of Colleges & Schools (SACS) as the first fully accredited charter school systems in the United States.

Further, International Studies Charter High School was ranked #13 in the nation as one of the nations "Best High Schools" by U.S. News & World Report and Newsweek magazines and #1 in the state of Florida, this year. The Advanced Placement® participation rate at International Studies Charter High School is 100 percent. It was awarded a Gold Medal based on its performance on state assessments and college readiness. Academica-serviced high schools represented 5 out of the top 25 schools while 14 Academica-serviced schools were ranked overall. Last year, two Academica-serviced schools were 2014 National Blue Ribbon Award honorees: Doral Performing Arts & Entertainment Academy and Mater Gardens Academy. Additionally, the Somerset and Mater Academy schools earned District accreditation from the Southern Association of Colleges & Schools (SACS) -- the first, and only, fully accredited charter school systems in the United States. On average, Academica's charter schools earned a letter grade of "A" during the 2014 testing year from the Florida Department of Education.

The president of the ESP, Fernando Zulueta, is a founding Board Member of the Florida Consortium of Charter Schools, and a Board Member of The National Alliance for Public Charter Schools. Mr. Zulueta has received numerous awards for his work with charter schools including the "Cervantes Award" sponsored by Nova Southeastern University for significant efforts to support excellence in the education of Hispanic students.

G. Provide a complete list of other charter schools the ESP operates or previously operated using Addendum C (Form IECP-M1A).

Please see attached Addendum C

Section 12: Human Resources and Employment

- A. *Explain the school's compensation plan, including whether staff will be publicly or privately employed.*

The School will be a not-for-profit, private employer, and will not participate in the Florida Retirement System. Full time, salaried employees will be entitled to Health Insurance and other benefits as detailed below. For employee insurance and benefits selection, the Governing Board has engaged the services of ADP Totalsource, a professional employer organization that provides human resource services to small and moderate size employers. The use of a professional employer organization allows the staff of the School to enjoy the same level of benefits that are available to employees of large organization such as Fortune 500 companies (including health/dental/vision insurance and Retirement/401k plans). More information on ADP is found on www.adptotalsource.com.

The proposed school will use its Governing Board's adopted performance-based salary schedule for instructional personnel and school administrators, in accordance with s. 1012.22(1)(c) relating to *Compensation and Salary Schedules*. The Board's plan includes a base salary schedule for classroom teachers, other instructional personnel, and school administrators in which annual adjustments are based on performance as follows:

- An employee who is "**highly effective**," as determined by his or her evaluation, would receive a salary increase that must be greater than the highest annual salary adjustment available to that individual through any other salary schedule adopted by the board
- An employee who is "**effective**," as determined by his or her evaluation, would receive a salary increase between 50-75 % of the annual salary increase provided to a highly effective employee.
- An employee who is in "**need of improvement (or developing)**" or is "**unsatisfactory**," as determined by his or her evaluation would not be eligible for a salary increase.

Such adjustments will be in addition to the base salary schedule that is not a bonus and becomes part of the employee's permanent base salary and shall be considered compensation under s.121.021(22).

Advanced Degrees will not be used for base salary calculations, but may be used for supplements. Supplements will be annual additions to the base pay, but will not be not part of the continuing base salary.

- B. *Describe the personnel policies and procedures to which staff will be required to adhere, including expectations for participation in the school's professional development program. If personnel policies and procedures have not been developed provide a clear plan, including timeline, for the development and approval by governing board.*

The school will adhere to all antidiscrimination provisions of section 1000.05, F.S. The school will not discriminate based on actual or perceived disability, gender, nationality, race or ethnicity,

religion, sexual orientation in the hiring of its employees. All faculty and staff members employed by the School will possess the personal characteristics, knowledge base of and belief in the educational and curriculum design as described in this proposal, as well as an ability and motivation to work as part of a team with parental involvement. The School will look for personnel who bring with them a sense of enthusiasm and commitment as well as a strong belief in and understanding of the charter school concept.

Employees are expected to observe high standards of job performance and professional conduct. When performance or conduct does not meet standards, the School may terminate employment, or it may endeavor, if it deems appropriate, to provide the employee a reasonable opportunity to correct the problem. If, however, a corrective opportunity is given and the school determines that the employee has failed to make the correction, he or she will be subject to further discipline, including termination.

Under the No Child Left Behind Act (NCLB) of 2001, all teachers must be "highly qualified" to teach in the school. The definition of a highly qualified teacher includes meeting at least the following three criteria:

1. Having a bachelor's degree
2. Having State credentials or certificate
3. Demonstrated core academic subject matter competence

All instructional and non-instructional personnel who are hired or contracted to fill positions and members of the governing board of the school must undergo background screening as required by Section 1012.32, F.S. The school will be a safe, Drug-Free and Tobacco-Free Environment. All employees will be required to undergo background checks and drug-screenings.

Additionally, school employees will be required to adhere to The Code of Ethics of the Education Professional in Florida as defined in FAC Rule 6A – 10.080.

Contracts: Instructional personnel will receive either a probationary contract (for instructional personnel new to the profession or new to the district) or an annual contract (for personnel who have completed a probationary contract or are already under an annual contract). The contracts will provide just cause reasons, and process, for suspension or dismissal of instructional personnel during the term of an annual contract. At the end of the probationary contract, the Governing Board may choose to award or not award the Teacher an annual contract pursuant to §1012.335, Florida Statutes, with or without cause. Teachers will be evaluated in accordance with provisions of §1012.34, Florida Statutes.

The rules set forth below are not exhaustive and are intended to provide employees with illustrations and fair notice of what is expected from them. Obviously, however, such listing cannot identify every situation of unacceptable conduct and performance. Employees should be aware that conduct not specifically listed below, but which adversely affects or is otherwise detrimental to the interests of the school, to students, or to other employees, may also result in disciplinary action.

Probation Period

Pursuant to Florida Statute, Section 1012.335, all instructional personnel will be issued a probationary employment contract for a period of one school year upon initial employment in the school.

Voluntary Termination

The School will consider an employee to have voluntarily terminated or abandoned his or her employment if an employee does any of the following:

- Elects to resign from the school.
- Fails to return from an approved leave of absence on the date specified by the school.
- Fails to return to work without notice to the school for three (3) consecutive days.

Involuntary Termination

The School expressly reserves the right to discharge employees for cause, but without being in violation of the laws of the State of Florida and the United States of America. The School assures thorough, consistent, and even-handed termination procedures. Terminated employees will receive all earned pay to the next regular pay period. An employee may be terminated involuntarily for any reason not prohibited by law, including a leave of absence in excess of 180 days, incompetency, misconduct, or other violations of the school's rules of conduct for employees. Involuntary termination, other than for an administrative reason or abandonment of employment, will result in forfeiture of all earned accrued compensation, other than as required to be paid by law.

Job Performance: Employees may be disciplined/discharged for poor job performance, including but not limited to, the following:

- Below-average work quality or quantity
- Poor attitude or lack of cooperation
- Excess absenteeism, tardiness, or abuse of break or lunch privileges
- Failure to follow instructions or procedures
- Failure to follow established safety/security procedures

Additionally, school employees will be required to adhere to The Code of Ethics of the Education Professional in Florida as defined in FAC Rule 6A – 10.080.

Misconduct: All school instructional personnel will be required to adhere to the Principles of Professional Conduct for the Education Profession in Florida as defined in FAC Rule 6A-10.081. Violation of any principles detailed therein shall subject the individual to revocation or suspension of the individual educator's certificate, or the other penalties as provided by law. In addition, any employee may be disciplined or discharged for misconduct, including but not limited to the following:

- Dishonesty;

- Insubordination;
- Theft;
- Discourtesy (to students, parents, peers, supervisors, etc.);
- Misusing or destroying school property or the property of another;
- Disclosing or using confidential or proprietary information without authorization;
- Falsifying or altering school records, including the application for employment;
- Interfering with the work performance of others;
- Harassing other employees or students;
- Being under the influence of, manufacturing, dispensing, distributing, using, or possessing alcohol or illegal or controlled substances on school property or while conducting school business or supervising students;
- Possessing a firearm or other dangerous weapon on school property or while conducting school business;
- Conduct which raises a threat to the safety and well being of the school, its employees, students, or property, including being charged or convicted of a crime that indicates unfitness for the job; and/or
- Failing to report to the school any charge or conviction under any criminal, drug, state or felony arrests. *Employees must self-report within forty-eight (48) hours to appropriate authorities (as determined by district) any arrests/charges involving the abuse of a child or the sale and/or possession of a controlled substance. Such notice shall not be considered an admission of guilt nor shall such notice be admissible for any purpose in any proceeding, civil or criminal, administrative or judicial, investigatory or adjudicatory. In addition, shall self-report any conviction, finding of guilt, withholding of adjudication, commitment to a pretrial diversion program, or entering of a plea of guilty or Nolo Contendere for any criminal offense other than a minor traffic violation within forty-eight (48) hours after the final judgment. When handling sealed and expunged records disclosed under this rule, school districts shall comply with the confidentiality provisions of Sections 943.0585(4)(c) and 943.059(4)(c), Florida Statutes.
- Failing to immediately report suspicion or knowledge of child abuse, abandonment or neglect. *The school will follow the district policy regarding any and all procedures for reporting child abuse, abandonment or neglect. All employees who know or have reasonable cause to suspect that a child is an abused, abandoned, or neglected child, must report such knowledge or suspicion immediately to the Department of Children and Families Florida Abuse hotline. The employee should immediately notify the school principal and follow the districts procedures including completion of appropriate reporting documentation. Failure to immediately report suspected child abuse, abandonment, or neglect may result in termination by the school and criminal penalties by law enforcement authorities.

The school may proceed directly to a written reprimand or to termination for misconduct or performance deficiency, without resort to prior disciplinary steps, when the school deems such action is appropriate. If an employee is recommended for dismissal by the principal of the school, the principal will propose such dismissal at a meeting of the Board of the School. The employee shall have the right to contest the dismissal at the board meeting and present testimony or evidence in connection with the dismissal action.

Professional Development

In setting high expectations for both students and teachers, the School will be committed to maintaining the level of high quality instructors by implementing a comprehensive professional development plan. The school will support the professional development needs of all professional staff by subsidizing college classes, facilitating the attainment of continuing education credits, and offering trainings.

Teacher training will be offered throughout the school year in a variety of forms. Select teachers will attend local, state and national conferences and serve as trainer to the remainder of the staff upon return to the School. Appropriate and relevant school wide training will occur on teacher planning days as well as on early release dates. All staff will participate in school-initiated and other relevant and necessary workshops for professional development, and a member of the administrative team will coordinate, assist and monitor the staff development process. The Educational Service Provider may also prepare staff development meetings in which the school may elect to participate. In-house workshops and meetings will be held monthly by administrators and may occur as often as biweekly through team leaders, in order to facilitate support, encourage communication, allow for team planning, and troubleshoot concerns and needs.

In addition to school wide professional development opportunities, faculty members will each complete an Individual Professional Development Plan (IPDP) as a means to document and identify areas for personal targeted professional growth, including the identification of strategies for obtaining specified goals, its' compatibility to ensuring the professional development exercise will serve to benefit the student, and a timeframe in which the staff development exercise should occur. All IPDPs will be approved by the Principal, or his/her designee, at such time the principal may elect to recommend additional recommended professional development that should occur within a given timeframe.

The principal or member of the administrative staff, together with the teacher, will commit to the IPDP, including the allocation of necessary resources for plan implementation, and observation of new/struggling teachers by veteran/mentor teachers to implement support strategies.

Section 13: Student Recruitment and Enrollment

- A. *Describe the plan for recruiting students, including strategies for reaching the school's targeted populations and those that might otherwise not have easy access to information on available educational options.*

The School will make great efforts to reach families reflective of the demographic of the County. A comprehensive advertising and promotional plan will include the use of print, direct mail, grass roots marketing and online media to disseminate information about the school's educational program and open enrollment period. The goal is to reach parents by using various means of information delivery. Promotional flyers and/or postcards may be distributed via direct mail, penny-saver publications, and/or directly to community groups and churches to ensure that harder-to-reach families are aware of the school and their eligibility to apply for enrollment. This information may also be posted in local public facilities such as community centers, parks/recreation centers, libraries and other locations of public access as permitted by local regulations. In order to best reach out to the county's growing diverse population, informational materials will be available in multiple languages, as needed.

The School will distribute press releases and/or public service announcements to various media outlets to promote the open enrollment period, open house and other essential details about the school and its programs. A banner/signage will also be posted on site with relevant information.

Once opened, parents and community partners will be encouraged to inform family, friends, and their community groups about the School. Local elected officials and community leaders will be invited to visit the School. They will also be given an update on the program's growth and asked to share open enrollment information with their constituents through their newsletter and upcoming community meetings.

- B. *Explain how the school will achieve a racial/ethnic balance reflective of the community it serves or with the racial/ethnic range of other local public schools.*

In accordance with federal and state anti-discrimination laws, and with Florida Statute 228.2001, the Somerset Board will not discriminate on the basis of race, religion, national or ethnic origin, or exceptionality in the admission of students at all grade levels. The anticipated target population to be served are middle school students who have a potential desire to attend college post high school, while still reflecting the racial and economic diversity of the geographic area, as dictated by the state.

Students will be considered for admission without regard to ethnicity, national origin, gender, or achievement level. The school expects to achieve diversity reflective of the community.

The school's promotional plan aims to reach a broad audience and, accordingly, all racial/ethnic groups within it. By disseminating information in multiple languages to various media -- including minority and community periodicals, and postcard mailers delivered directly to residential addresses in various communities, the racial/ethnic balance of the School should be equivalent to

that of public schools within the County.

Informational meetings will be held in a variety of community forums, to ensure that a diverse set of families are reached and given the opportunity to learn about the educational opportunity at the School. The governing board and administrators will also work with diverse community groups to seek assistance in disseminating information.

C. Describe the school's enrollment policies and procedures, including an explanation of the enrollment timeline, criteria and/or any preferences for enrollment, and lottery process.

Admission Policy - In accordance with federal and state anti-discrimination laws and in accordance with the Florida Educational Equity Act, Section 1000.05(2)(a), the School will not discriminate on the basis of race, ethnicity, national origin, gender, or disability against a student in its school admission process. An open admissions policy will be implemented wherein the School will be open to any student residing in the County. Any eligible student, as described in F.S. §1002.33(10), who submits an application (prior to the posted deadline) shall be considered, unless the number of applications exceeds the capacity of the program, class, grade level, or building. In such case, all applicants shall have an equal chance of being admitted through a random selection/lottery process. If the number of applications falls short of the established capacity, supplemental registration periods may be held for the purpose of reaching student capacity.

Enrollment Preferences - In accordance with 1002.33(10)(d), F.S. the charter school may give enrollment preference to the following student populations:

1. Students who are siblings of a student enrolled in the charter school.
2. Students who are the children of a member of the governing board of the charter school.
3. Students who are the children of an employee of the charter school.
4. Students who are the children of: An employee of the business partner of a charter school-in-the workplace established under paragraph (15)(b) or a resident of the municipality in which such charter school is located; or A resident of a municipality that operates a charter school-in-a-municipality pursuant to paragraph (15)(c).
5. Students who are the children of an active duty member of any branch of the United States Armed Forces.

In order to minimize any traffic impact caused by the school and ensure that the school is available to serve the residents of the neighborhood where the school is located, the Governing Board of the charter school may elect to limit the enrollment process to target students residing within a reasonable distance of the school as provided under Florida law.

Enrollment Limitation - In accordance to 1002.33(10)(e), F.S. the charter school may limit the enrollment process only to target the following student populations:

1. Students within specific age groups or grade levels.
2. Students considered at risk of dropping out of school or academic failure. Such students shall

- include exceptional education students.
3. Students enrolling in a charter school-in-the-workplace or charter school-in-a-municipality established pursuant to subsection (15).
 4. Students residing within a reasonable distance of the charter school, as described in paragraph (20)(c). Such students shall be subject to a random lottery and to the racial/ethnic balance provisions described in subparagraph (7)(a)8 or any federal provisions that require a school to achieve a racial/ethnic balance reflective of the community it serves or within the racial/ethnic range of other public schools in the same school district.
 5. **Students who meet reasonable academic, artistic, or other eligibility standards established by the charter school and included in the charter school application.**
 6. **Students articulating from one charter school to another pursuant to an articulation agreement between the charter schools that has been approved by the sponsor.**
 7. Students living in a development in which a business entity provides the school facility and related property having an appraised value of at least \$10 million to be used as a charter school for the development. Students living in the development shall be entitled to 50 percent of the student stations in the charter school. The students who are eligible for enrollment are subject to a random lottery, the racial/ethnic balance provisions, or any federal provisions.

Enrollment Timeline (Approximate Dates):

Nov 1-Feb 1	Student Registration
Feb 5	Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted.
Feb 6	Second Registration Period Begins
June 15 th	Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted.

D. Explain any student and/or family contracts that will be used as a requisite for initial and continued enrollment in the school. Describe if and how the school will enforce such contracts.

As noted in the sample Parent Contract provided, through the contract, parents and students agree, as members of the school's family, to abide by all of the school rules and regulations. Through the contract, parents agree, as stakeholders in the school, to abide by all of the school rules and regulations. The sample parent contract stipulates various items that will be utilized in support of the child's education. For example, parental involvement in the educational process is a major initiative. Therefore, one of the stipulations of the contract is that parents willingly agree to hours of service as an investment in the child's education. Please see *Appendix E - Sample Parent Contract*. The School will provide various options to complete such volunteer obligation, in accordance with State law and detailed below.

The School shall implement parent/guardian contracts as provided by law. The school will work to

resolve matters regarding the parent/guardian contract by: 1) setting up a parent/guardian conference (via telephone or in person) to discuss and work with the parent/guardian toward a mutually satisfactory resolution and/or 2) providing opportunities for parents/guardians to fulfill their responsibilities under the contract.

E. Explain any other efforts to encourage parental and community involvement, if applicable.

Parental and community involvement in the School is a fundamental and required part of the philosophy and operation of the School. The goal is to encourage parents to be active participants in their child's education, and give the community ownership of a high quality educational program, and teach children to be civic-minded and socially responsible. Parents and community members will have extensive opportunities for involvement in aspects of school operations. Through the parent/teacher group School Advisory Council (SAC) and other such committees, parent and community representation and decision making in the educational processes of the School is possible. Similarly, the administration will also require the faculty and staff of the School to uphold a strong belief in and understanding of the charter school concept through the inclusion of parents in the educational process. Through open lines of communications, faculty and staff will also encourage parental involvement through such endeavors as follow:

- Parental Service Contracts – parents agree to volunteer with their child's teacher and/or be involved in other ways in school activities.
- School Advisory Council (SAC) This group will consist of school personnel, parents, students, local business, and community members. Members will be able to address and vote on pertinent school matters on a regular basis.
- Quarterly Parent/Teacher Conferences – hosted in the evenings at the School where parents can discuss topics that affect their children's educational progress.
- Open houses, Career Fairs, Family Day - events held to recruit new students, maintain communication and involvement between the School and the surrounding community.
- School Website, Newsletters, and Event Calendar – updated regularly to disseminate information and maintain open lines of communication in the community.
- Community Service Projects – students, faculty and parents will participate in activities to help, give back to, and connect with, the community.

Parent Workshops on education-related topics, such as decision-making regarding school performance and student assessment needs will be offered. Parent/Teacher Conferences and the electronic grade book, will also encourage parents to be fully involved in the School's operations and will promote parental partnerships in the educational process. Volunteer opportunities to complete parent participation hours (communicated through newsletters, the School website, email and calls home) will be plentiful and yearlong. Some of these will include activities such as chaperoning field trips, assisting with class and community service projects, helping in the library, participating in Career Week and Family Day, and assisting with the School store.

IV. BUSINESS PLAN

Section 14: Facilities

If the site is acquired:

A. Describe the proposed facility, including location, size and layout of space.

Somerset College Preparatory Academy Middle proposed facility is to be located on an approximately 10.4 acres at the northeast corner of Peacock Blvd. and California Blvd. This 100,000 square foot site at total build out can house up to 1500 student stations. The site will accommodate the needs of the expected student population and program at that time. The School will lease the facility.

The facility will have an adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency. The proposed facility will have all the requisite programmatic elements including: classrooms, multi-purpose spaces, library/media-lab, science and labs, restrooms, and administrative offices, cafeteria, gymnasium, and ancillary programs.

The **projected** enrollment for year one for the MS is 250. In order to meet the 600 student station, the HS component would cap at 350, not 400. The proposed Phase I facility is designed to accommodate 600 to 650 students. Further, the site infrastructure that is being built as part of Phase I exceeds the requirements necessary for the 600-650 student stations. The number 600 has been presented to the City as a baseline enrollment figure for Phase I. Again, both the Phase I building and site infrastructure is designed to accommodate more than 600 students and associated staff.

Size and Layout of Space:

The proposed facility of approximately 100,000 square feet will provide an appropriate amount of space for the educational program and will have all the requisite programmatic elements such as classrooms, labs, cafeteria, lecture hall, administrative offices, gymnasium and ancillary programs for a 1500 student station.

B. Describe the actions that will be taken to ensure the facility is in compliance with applicable laws, regulations and policies and is ready for the school's opening.

The educational facility will comply with the Florida Building Code pursuant to Section 1013.37, F.S. or with applicable state minimum building codes pursuant to Chapter 553, F.S. and state minimum fire protection codes pursuant to Section 633.025, F.S., as adopted by St. Lucie County. The facility will meet all local and state requirements for education facilities, including but not limited to, restrooms, fire safety, campus security, air quality control, weather proofing, etc.

Somerset will participate in the Sponsor's annual site compliance visits for the purpose of reviewing and documenting, as appropriate, compliance with applicable health and safety requirements. Other inspection agencies may include inspections of kitchens and related spaces as well as Department of Labor and Employment to for OSHA compliance. The School will show proof of the annual inspections prior to the first day of operations.

C. Describe how the facility will meet the school's capacity needs for students to be served.

The facility will be designed to accommodate the approved enrollment of students and will have all the requisite ancillary functions common to educational facilities. These ancillary functions will be designed to ensure the creation of a safe and effective educational environment for students, visitors and staff.

D. Explain the anticipated costs for the facility, including renovation, rent, utilities and maintenance. Identify, if applicable, any funding sources (other than state and local funding) that will be applied to facilities-related costs.

- *The financial plan for the proposed school should align with the facilities-related costs described.*

Estimate of Costs - These Budget projections in *Appendix F* have been derived from actual historical data from other comparable charter school facilities leased by the board, and from experienced charter school facilities developers, updated based upon widely-reported cost escalations for land and construction costs for the corporation's charter school programs. The forecast base rent and all other facilities costs are included for all years of the charter in the proposed budget are as follows:

Lease of Facilities: The amount assumes an average projected cost of \$900 per student station in the budget. This amount is comparable to that paid by several other charter schools with similar enrollment numbers which have opened recently. It is the intent of this proposed school to try to negotiate under similar terms when entering into new leases. The Governing Board considered the cost of construction and the land costs, factor in the current costs, and assumed a very conservative figure of \$900 per student. The Board has obtained confirmation that the budgeted amounts comport with the current forecast of lease conditions. Lease payments will commence upon the taking of possession of the facilities by the School. Long-term leasing provides to the School the ability for the School's Governing Board to focus on its core mission (education and educational programming), outsourcing the design, acquisition, permitting, financing, and construction of facilities to experienced entities in those fields. In addition, long-term leasing separates the School from the vagaries of real estate and financial markets, creating long-term guaranteed access to needed physical plant without the associated risks of ownership. The lease documents will provide that so long as the School is meeting its rent and other obligations, even the foreclosure of the property by the developer's lender will not affect the School's continuing rights to possession and use of the facilities under the lease.

Utilities and maintenance cost estimates are shown in the proposed budget and amounts are comparable to the average annual costs paid by other charter schools with similar enrollment numbers. Water and sewer and electricity bills are projected at \$1,580 /Classroom. Operations of Facility includes Purchased Service CAM (Custodial, fire and alarm, pest control), Property Insurance and Utilities.

E. Describe the back-up facilities plan.

- *What is the alternate plan for facilities if the proposed facility is not available or is determined to be inappropriate for the school's opening?*

The ESP has successfully assisted other charter school applicants in securing state-of-the-art charter school campuses. The ESP also has relationships with award-winning design and engineering firms, as well as contractors with a track record of timely completion of excellent facilities meeting the needs of the School. For example, Mater Academy East Charter School's facility, a 6-month construction project, was awarded "Outstanding Educational Design" and featured as the cover of *The American School & University Magazine's* June 2006 issue.

In the event that issuance of the Certificate of Occupancy is for any reason not expected in a timely fashion, Somerset College Preparatory Academy Charter High School (currently located in SLW has a 5 year lease, renewable at the end of each year, with permission to add portables on site) will allow Somerset College Preparatory Middle School to share space.

If the site is not acquired:

- F. Explain the school's facility needs, including desired location, size, and layout of space.*
- G. Provide an estimate of the costs of the anticipated facility needs and describe how such estimates have been derived.*
 - *The financial plan for the proposed school should align with the facilities-related costs described.*
- H. Explain the strategy and schedule that will be employed to secure an adequate facility.*
- I. Describe the back-up facilities plan.*
- J. Describe the plan and methods the school will employ to comply with Florida's constitutional class size requirements.*

Section 15: Transportation Service

- A. *Describe the school's plan for transportation, including any plans for contracting services. Your plan should discuss, to the greatest extent possible, the issues relevant to the school's transportation plans.*⁴

The School's plan for transportation, including any plans for contracting services, will be pursuant to Florida's Charter School Legislation and consistent with the requirements subpart I.E. of Chapter 1006 and 1012.45, F.S. The School transportation plan will abide by applicable district, state, and federal rules and regulations. Accordingly, the School will ensure that transportation is not a barrier to equal access within a reasonable distance of the School, as required and defined by section 1002.33, F.S.

Somerset College Prep Middle will be a community-based school and as a community based school it is expected that parents will provide the majority of students with transportation. The school will facilitate this assumption by working with parents to encourage car-pooling and alternate means of transportation. However, SCPAM will include a transportation survey with its registration materials to determine the number of children requiring school bus transportation. **As the current HS provides transportation by contracting with A&S Transportation, it is expected that the same will apply to the middle school once the transportation surveys have been reviewed and need has been determined.**

The School's plan for providing reasonable and equitable transportation opportunities for all students is as follows:

Parent Transportation Agreements: The School's plans for contracting services, as described in Florida law, §1002.33(20)(c) F.S., provides that the governing body of the charter school may provide transportation through an agreement or contract with a private provider or with parents. The School will enter into agreements with the parents/guardians to provide transportation for their children as stipulated in the school's proposed parental involvement agreements wherein parents receive volunteer hours. The school believes that the time a parent can spend daily transporting the student (his or her child) to the school is a valuable opportunity for the parent and student to strengthen their bond and share information regarding the day's activities and events at the school.

Ensuring Equal Access: The school will ensure that transportation is not a barrier to equal access within a reasonable distance of the School, as provided in the Florida's Charter School Legislation. In the case transportation is needed and if the parent advises the School that there is a hardship, and he/she is unable to provide the transportation, the School will provide transportation within a defined reasonable distance. In such cases, the School shall be responsible for transporting all students in a non-discriminatory manner to and from the School who reside within a "reasonable distance" of the School --defined herein as a two to four mile radius of the School-- or who

⁴ The charter school and the sponsor shall cooperate in making arrangements that ensure that transportation is not a barrier to equal access for all students residing within a reasonable distance of the charter school as determined in its charter. (Section 1002.33(20)(c), Florida Statutes)

otherwise are entitled to transportation by law.^{5"/>[1] In these situations, the School may provide transportation by contracting with an independent private transportation provider, such as A&S Transportation.}

Transportation for ESE Students: The School may contract with a private transportation carrier to provide specialized transportation for students with disabilities based on their particular student needs and that which may be specified in a student's IEP.

Private Providers: Any private providers contracted by the School will be such providers who have been approved by the State. The School will comply with all applicable requirements of Fla. Stat. 1012.45 and review these rules and statutes at least annually for any changes thereto in ensuring compliance with statutes and rules pertaining to the safety of transported students. The School will provide the Sponsor with the names and contact information of any and all contracted private providers in ensuring monitoring of compliance for the safe transporting of students, upon request by the Sponsor.

^[1] The term "reasonable distance" is defined in accordance with Chapters 1000 through 1013, Florida Statutes, as amended from time to time and the standards and guidelines provided by the State Department of Education.

^{5"/>[1] The term "reasonable distance" is defined in accordance with Chapters 1000 through 1013, Florida Statutes, as amended from time to time and the standards and guidelines provided by the State Department of Education.}

Section 16: Food Service

- A. *Describe the school's plan for food services, including any plans for contracting services or plans to participate in the National School Lunch Program.*

The School will explore the three food service options below:

Option 1:

The School may contract with the school district (if allowed) as a preference for food service to the school. The HS currently has a year to year contract with the Sponsor for food service. We would like to extend this contract to the MS for the first building phase of the new facility.

Option 2:

In the event a reasonable contract cannot be negotiated with the district, the school would look to a private provider for food services. The school would create an RFP for potential food service providers and the board would make the final decision on the vendor. The School may contract with an independent provider to prepare and provide meals, or the school may prepare and serve the meals to students. If an independent provider is required, the school will solicit bids from private vendors for food service. The private vendor selected by the school will prepare and deliver food to the school in accordance with standards established by the Florida Department of Professional and Business Regulations. The private vendor will be required to maintain and supply the school with daily records of all lunches served and current copies of inspection and insurance certificates.

Option 3:

Phase 2 of the new facility will include a cafeteria and fully functional kitchen. Once Phase 2 of the facility has been completed, Somerset Academy Inc. is an approved Sponsor of the National School Lunch Program (NSLP) and therefore the School may participate in the free/reduced priced meal program. The School may be an approved site under Somerset Academy, Inc.'s NSLP Sponsorship and would provide free and reduced priced meals for eligible children. Eligible children are children from households with gross incomes within the free and reduced limits on the Federal Income Guidelines.

Schools have a Verification Plan that is implemented each school year. During the verification period, the confirmations of eligibility for free and reduced priced meal benefits under the National School Lunch Program are completed. Verification includes income documentation or confirmation that the child is included in a currently certified Temporary Assistance to Needy Families (TANF) assistance unit, SNAP, or Food Distribution Program on Indian Reservation (FDPIR). Verification efforts are not required for students who have been directly certified, homeless certified, and migrant certified or designated as a runaway youth. Directly certified

students, migrant children, homeless and runaway youth are granted automatic eligibility for free meal benefits.

An organized meal service that meets local health, state and federal regulations will be offered at the school site. Nutritious meals will be provided in accordance with the USDA Dietary Guidelines of meal component and portion size requirements. Food temperatures will be maintained in accordance with USDA guidelines and state standards. All meals will be distributed to students using a point of sale accountability procedure.

The School would process all necessary lunch applications; adhere to program operation and record keeping requirements; and use of the Child Nutrition Program (CNP) system. The School will implement the following procedure for processing Free/Reduced Lunch Applications:

- Disseminate lunch applications to all students upon enrollment
- Collect lunch applications and determine applications, according to Florida Income Eligibility Guidelines, published in the Federal Register by Food Nutrition Service, USDA;
- Enter determinations for each child into the Sponsor's mainframe
- Provide students with notice of eligibility;
- Serve/Charge student lunches in accordance with determined eligibility;
- Submit claims for reimbursement within 30 days of the following month for each approved month of the school year once approved by the NSLP).

Lunch Area - The school facility will include a lunchroom or, at minimum, a seating area that meets state nutritional and sanitation standards. The School agrees to have two satisfactory health inspections conducted on a yearly basis, by the State Department of Health, County Department, as required, to maintain Permit for Food Service

Section 17: Budget

- A. *Provide an operating budget covering each year of the requested charter term that contains revenue projections, expenses and anticipated fund balances. The budget should be based on the projected student enrollment indicated on the cover page of the application.*

See Appendix F-Operating Budget

- B. *Provide a start-up budget that contains a balance sheet, revenue projections, including source of revenues, expenses, and anticipated fund balance. The start-up budget must cover any period prior to the beginning of FTE payments in which the school will expend funds on activities necessary for the successful start-up of the school.*

See Appendix F-Start-Up Budget

****Start-Up Budget Revenue-** the school will apply for a \$25,000 planning and design grant, as provided by the Charter School Implementation Grant Program. If awarded, the grant will assist the school with the start-up costs, which will be incurred prior to the period when the school will begin to receive operational funding from the sponsor. In the event that the start-up grant is not awarded, the school can either use resources from its network or has identified a non-profit charter school lender that will provide a line of credit to support the opening expenditure. If the school opens at 50% enrollment, debt repayment of this line of credit will be interest only for at least 3 years and the school will have the option to pay when funds are available. See Appendix H.

Startup Budget Expenses: The startup budget expenses detailed below based on the critical expenses for planning and program design and include: marketing and enrollment efforts; office computer and printer; and administrative expenses.

- C. *Provide a detailed narrative description of the revenue and expenditure assumptions on which the operating and start-up budget are based. The budget narrative should provide sufficient information to fully understand how budgetary figures were determined.*

The school's budget forecast was developed using statistical data collected from a decade's worth of operations at more than 100 charter schools successfully operating in Florida and specifically in alignment with the school's proposed 6-8 program. Additionally, representatives of the charter applicant have attended state sponsored charter school budget training workshops in prior years. The data and methodology used to prepare the budget forecast is highly reliable, and every one of the charter schools that developed budgets using this system, completed the past school year with a budget surplus.

The budget contains the following sections to help the reader follow the assumptions presented in the budget:

Budget Summary – this section contains summary information of the overall budget. It is broken up into three different areas:

- Grades Served- Number of students, per student revenue based on the State provided revenue worksheet. In addition, the annual increase in per pupil funding is calculated.
- Revenue and Expenditure Summary- Contained in the expenditure section is information on the size and cost of the facility.
- Teacher Staff Summary – Illustrates the average class size, number of teachers, and benefits per teacher.

Budget Detail – The complete five-year budget is presented in this section. For each year of the budget there is a proposed budget enrollment at 100% of projected enrollment, as well as at 75% and at 50% of enrollment:

- The revenues are calculated based on the number of students using the Revenue Worksheet. For subsequent years the State Source funding is calculated using the funding formula in the Budget Summary multiplied by the number of students.
- The expenditures are calculated based on a function of each line item. Each line item has a cost and a basis for the calculation.
- For salaries the total is presented from the Staffing matrix section for each function.

Budget Monthly Years 1-5 - In these sections the annual budget is presented in a monthly format on a cash basis for each of the years of the charter. The ESP has negotiated payment terms with various vendors and the amounts shown follow the payment terms received.

School Design – In this section the number of classrooms and students is presented in four different formats along with the percentage of ESE, ELL, and students qualifying for free and reduced lunch meals.

Staffing Plan – This section is broken out into three different areas;

- The first item is the assumptions used for calculating the benefits provided to each staff member.
- The second area is to provide the calculation for the number of staff members for each position.
- Next is the calculation of the pay amount times the number of positions for that function. In addition, benefits costs are calculated at the gross amount times the benefits rate from the first item.

All Charter School Calculator – This section is from the Florida Department of Education Revenue worksheet used to calculate the gross State Funding.

Start-up Budget – The budgeted amounts of revenue and expenditures before the school's first fiscal year of operation are presented in this section.

All Charter School Calculator – This section is from the Florida Department of Education Revenue worksheet used to calculate the gross State Funding.

Operating Budget Revenue

The FTE Revenue forecast is based upon data provided by the Florida Department of Education and the sponsoring school district at informational meetings held by sponsors for new charter school applicants. The application includes a detailed Revenue Worksheet in *Appendix F*, which explains how revenue figures were derived.

The Transportation Reimbursement revenue was based on the assumptions provided in the budget notes therein.

The Lunch Program income is calculated based on an estimated percentage of F&R lunch from existing schools in the target area, plus an estimation of students paying for their own meals. The revenue and costs associated with the lunch program are detailed in the *Budget Detail* section of the budget.

Operating Budget Expenditures have been forecast using the statistical expense data compiled from over 100 successfully charter schools operating in Florida. The data is highly reliable and every one of more than 100 charter schools that developed budgets using this system this past school year completed the year with a budget surplus.

Instructional Expenses:

Salaries include classroom teachers, contract or hourly, and teacher aides. The number of instructional personnel is in accordance with Florida Law for class size as it pertains to charter schools (*See Staffing Plan in the Budget*).

- Teacher Salaries were derived at by using an average salary of \$40,500 for Year 1. The number of instructional personnel is in line with Florida's laws relating to class size.
- Paraprofessionals (if applicable) are budgeted at an average salary of \$ 18,000.
- Pupil Personnel Services includes 2 ESE teachers a rate of 42,00 per year, as needed based on student enrollment. As noted in the detailed Revenue Worksheet included in the application, the budget anticipates that 11% of students will be classified as ESE. There is room in the budget to modify the amount paid for ESE services under Miscellaneous and in the Budget Surplus, should the rate of contracted services for ESE and ELL increase due to the various needs of the students once enrolled.
- Substitute teacher costs assumes that substitutes will be hired for 10 days/full-time teacher at a rate of \$80/day.
- Administrative Salaries include a ½ Principal, \$42,500
- Clerical and Administrative assistant salaries include those for Administrative Assistants/Clerical personnel, data processor and Registrar
- Security is provided by the City and Custodial personnel will be on loan from the HS for year one, and is budgeted for year 2.
- Contracted Professional Services in the Budget Detail include professional fees paid to entities such as the Services and Support Provider, Speech Therapist, and other ESE service providers.
- Employee Benefits are calculated at a rate of 23% of all salaries (excluding contracted services). This includes health insurance costs, 401k contributions, tuition reimbursements, Worker's Compensation, and all mandatory federal and state employment taxes. As noted in the application, for employee insurance and benefits selection, the Governing Board has

engaged the services of ADP Totalsource, a professional employer organization that provides human resource services to small and moderate size employers. The use of a professional employer organization allows the staff of the School to enjoy the same level of benefits that are available to employees of large organization such as Fortune 500 companies (including health/dental/vision insurance and Retirement/401k plans).

- **Staff Development** covers Workshops/Trainings workshops and other PD activities (and includes incentive pay for teachers) costs for funds to satisfy FL Statute 1012.34 at approximately \$1,000 per teacher.

Instructional Expenses include expenditures include Classroom Supplies and Equipment, Teacher Supplies, Textbooks and Student Activities budgeted at a per student rate. Supplemental instructional materials (CIRP/SIRP and Technology) as per Reading and Math Interventions (Reading Plus etc.) The budgeted amounts assume that the only revenue that the school will receive is FTE, and is therefore consistent with (and exceeds) the amount allocated to instructional materials under the categorical funding formulas used by the State of Florida.

Contract Services include professional fees paid to entities such as the Services and Support Provider, Speech Therapist, and other contracted instructional services. As noted in the detailed Revenue Worksheet included in the application, the budget anticipates that 11% of students will be Students with Disabilities. There is room in the budget to modify the amount paid for ESE services under Miscellaneous and in the Budget Surplus, should the rate of contracted services for ESE/ESOL increase due to the various needs of the students once enrolled.

The budgeted amounts assume that the main revenue that the school will receive is FTE, and is therefore consistent with (and exceeds) the amount allocated to instructional materials under the categorical funding formulas used by the State of Florida.

Instruction Related Technology includes the purchase of computer equipment/Interactive white boards boards and repairs of such, and educational software and electronic textbooks budgeted per classroom. This amount assumes that the main funding received is FTE, and does not take into account possible Implementation Grant funds. The amount may be categorized as a one-time expense outright, or as the annual expense paid under a long-term financing agreement (i.e. computer leases, loan payments, etc.). It is anticipated that equipment to administer state assessments and comply with digital instruction legislation will be funded by the planning and implementation grant. In the event that the grant is not awarded, the school has allocated resources for equipment leasing.

Board Expenses include Professional Legal Services for governing board, Insurance and Travel for Professional Development

The ESP fees are budgeted by services on a per student basis as follows: Instructional Services (Curriculum Planning, Research, Development and Evaluation) \$115.00/per student; General Administration management \$225.00, Fiscal Services (Planning, Research, Development and Evaluation) \$110.00.

Advertisement and Promotion includes costs related to recruiting students and staff (i.e. printing of brochures, website production, and advertisements in local media outlets).

Independent Financial Audit (Fiscal Services) cost was derived using amounts paid by schools of similar size to accounting firms that perform the Independent Audit.

Food Services: For year one, assuming a continued contract with the district, there is no allocation. For year two, assuming facility expansion, the Lunch Program expense is based on current figures found in the affiliated charter schools. The Applicant is approved under the National School Lunch Program and is qualified to receive reimbursements. Since we are uncertain of the precise population (and number of free and reduced lunch meals to be served) we are unable to provide a more precise budgeted structure for food service. However, an estimated amount is provided in the "Budget Detail" section of the budget.

Pupil Transportation Services is calculated at \$235/bus with 40% utilization for services and fieldtrips.

Operations of Facility/Plant includes Purchased Service - CAM (Custodial, fire and alarm, pest control), Property Insurance and Utilities. The figures included are based on statistical expense data compiled from over 100 successfully charter schools currently operating in Florida. It is the intent of this proposed school to use this data as the threshold when planning for its new facilities. The fees included are comparable to the average annual amounts paid by other charter schools with similar enrollment numbers.

- **Lease of Facilities:** The amount assumes an average cost of \$700 per student station (a triple net lease, which incorporates improvements). This amount is comparable to that paid by several other charter schools with similar enrollment numbers which have opened recently. It is the intent of this proposed school to try to negotiate under similar terms when entering into new leases.
- **Utilities and maintenance cost** estimates are shown in the proposed budget and amounts are comparable to the average annual costs paid by other charter schools with similar enrollment numbers. Water and sewer are set at \$80/Classroom and Electricity 2,600/ Classroom.
- **Operations of Facility/Plant** includes Purchased Service - CAM (Custodial, fire and alarm, pest control) at 2,400/Classroom and Property Insurance at 2,400 /Classroom.

Explain how the governing board will monitor the budget, including a strategy for addressing revenue shortfalls due to lower than expected enrollment.

The Board has the ultimate responsibility to ensure that the School's finances are managed properly. Accordingly, the Board will review and approve a preliminary annual budget prior to the beginning of the fiscal year. The ESP will work with the school Principal to prepare a school-site budget, which will include anticipated revenues and expenditures based on student enrollment. As part of its responsibilities, through a contractual agreement with the ESP, the ESP assists the Board and the Principal with the preparation and reporting of the School's finances including providing each school with quarterly reports which reflect budget vs. actual expenditures. The principal receives a monthly Profit and Loss statement from the ESP detailing expenditures in each of the budgeted categories to monitor spending throughout the year. This strategy allows for the principal and board to make adjustments to expenses in anticipation of any possible shortfalls.

At minimum, the Board will meet quarterly to review all financial statements and budgets and approve revisions to the budget as necessary. In the event a financial recovery plan is necessary, the Board will monitor it and ensure such plan is appropriately maintained.

Professional audit services are allocated and will be used to verify and audit the financial revenues and expenditures of the School to ensure to the Board that all funds have been allocated and used in accordance with generally accepted accounting standards, including internal controls, and will accurately represent the financial position of the school as well as the results of their operations and cash flows. Each year, the auditors are selected by the Board of Directors through an RFP process. In addition, the audit will confirm the operations of the schools and organization were properly conducted in accordance with legal and regulatory requirements, including Florida Statutes, and State Board of Education Rules.

Additionally, to ensure that the board has a sound and viable plan to address revenue shortfalls due to lower than expected enrollment, school's budget (attached herein as Exhibit F) reflects enrollment projections at 50%, 75% and 100% enrollment.

To ensure that the board can address revenue shortfall due to lower than expected enrollment, most expenses in the budget are based on the number of enrolled students. This allows the school to make adjustments to the budget as necessary. Additionally, the Board will be able to allocate the reserve funds as necessary should enrollment be lower than expected.

- D. Provide monthly cash flow projections for the school's start-up period (i.e. from the date on which the application is approved to the beginning of the first fiscal year of operation) through the first year of operation.*

See Appendix F – Budget (Monthly Cash Flow by Year)

- E. Describe the school's fundraising plan, if applicable. Report on the current status of any fundraising efforts, including verification of any fundraising monies reported in the school's start-up or operating budgets.*

Throughout the school year, the school will conduct fundraising activities to generate capital and to supplement the per pupil allocations. Examples of fundraising activities include Book Fairs, Museum Gallery nights where student art and work is showcased, Holiday Sales, School Pictures, yearbook sales, dress down days, and School Fair. The School may also apply for grants from national, state, and local foundations, as well as other sources for education grants, including the Charter School Implementation Grants. Specific grant sources will be determined, based on appropriateness and feasibility, by the school administration and Governing Board.

Additionally, the School will also receive a percentage of the sales made from school pictures and uniform sales. The School will also welcome and encourage sponsorship and donations from local business partners within the local community and hold fundraisers in alignment common interests and events. This includes financial and in-kind donations that will promote the educational program from the benefit of the community.

Section 18: Financial Management and Oversight

- A. Describe who will manage the school's finances and how the school will ensure financial resources are properly managed.*

The Governing Board has the ultimate responsibility to ensure that the School's finances are managed properly. The Board will contract with an Education Services Provider (ESP), which will assist the Board and the School Principal with the preparation and reporting of the School's finances.

The Board will review and approve a preliminary annual budget prior to the beginning of the fiscal year. The Principal of the School will prepare a school-site budget, which will include anticipated revenues and expenditures based on student enrollment. Each quarter, the Board will review the budget and make revisions, as necessary.

The Principal will manage the day-to-day operations and site-based finances, including expenditures and receivables. The Board will adopt a policy whereby the Principal will need to seek prior approval from the Board for expenditures over a pre-approved amount. The Principal will report at least quarterly to the Governing Board on the progress of the site-based budget and make recommendations and seek approval for large expenses. The Governing Board will oversee the Principal and remain responsible for all financial matters delegated to the Principal.

- B. Describe the financial controls, including an annual audit and regular board review of financial statements, which will be employed to safeguard finances.*

The School has established financial procedures to further safeguard its finances. The Governing Board shall annually adopt and maintain an operating budget, retain the services of a certified public accountant or auditor for the annual independent financial audit and review, and will approve the audit report, including audit findings and recommendations. In the event a financial recovery plan is necessary, the Board will monitor it and ensure such plan is appropriately maintained. The Governing Board of the School will also review and monitor the financial statements of the School on at least a quarterly basis during regularly scheduled Board Meetings.

Controls - The Board of Directors is responsible for establishing and maintaining a system of internal controls in order to provide reasonable assurance that the school's assets are safeguarded against loss from unauthorized use or disposition, and that transactions are executed in accordance with the school's authorization and recorded properly in the financial records. Specifically, the Board has established controls in accordance with all applicable federal, state and local laws and in line with accepted industry standards and best practices regarding:

- Revenues, accounts receivable, and cash receipts
- Expenditures, accounts payable, and cash disbursements
- Budgeting and financial reporting
- Risk management
- School inventory & capital assets
- Student records

- Employment records

Standard procedures utilized to ensure sound internal accounting and a system of checks and balances include:

General Accounting - utilization of accepted state codification of accounts pursuant to the Financial and Program Cost Accounting and Reporting for Florida Schools in all transactions pertaining to its operations.

Internal accounting procedures for the School pertaining to receivables and disbursements are as follows:

For receivables, all cash payments will be logged, coded by source and deposited in a timely manner. Deposits are reconciled to cash receipt logs. Disbursements will be made only to approved vendors and must be appropriately authorized. Disbursement voucher packages are prepared at the School site and authorized by the School Principal. Disbursement vouchers are submitted to the ESP with appropriate supporting documentation to substantiate the nature, account classification, business purpose and amount. Disbursement vouchers are reviewed and approved by the Principal and the ESP. For internal accounts, all disbursements require two signatures. For operating and lunch accounts, disbursements require two signatures for any check in the amount of \$2,500 or above. Checks in the amount of \$25,000 or above require that one of the signatures be that of the Board Chair. Authorized signatures on checks are limited to the Chair of the Governing Board, the president, the School Principal/designee, ESP representative, and others, as approved by the Governing Board.

Bank statements will be reconciled on a monthly basis. The School will provide regular financial statements to the Sponsor including a statement of revenues and expenditures and changes in fund balances, prepared in accordance with generally accepted accounting principles. These will be provided on the dates required by the School Board in the charter school contractual agreement between the School and the Sponsor.

Wire Transfers - copies of all wire transfers (e.g., FTE funds, grants, charter school capital outlay) into the school's banking account(s) along with supporting documentation are maintained and recorded in the general ledger by journal entry.

Internal Revenue Collection - funds collected at the school (i.e., lunch monies, fundraisers, field trips) will be initially collected by designated school staff. These funds along with supporting documents are submitted to the Financial Manager whose responsibility is to record and prepare the deposit. All deposits will be prepared in duplicate; the original goes to the financial institution and the copy remains intact in the deposit book. A copy of the financial institution validated receipt along with supporting documentation will be maintained.

Capital Expenditures - purchase orders are required for all capital expenditures and are pre-approved by the Executive Director, Principal, or Designee. Limits are set by the Board of Directors and may change as necessary. These purchase orders are prepared in duplicate with one going to the vendor and the other remaining at the school on file in the Accounting Office. Any purchase order totaling more than the limit as set by the Board of Directors requires Board action.

Operational Checking Accounts - all expenses related to the operations of the school are paid from the operating account. All operating expenditures are subject to the same approval processes as indicated for capital expenditures. All accounts are reconciled on a monthly basis and presented to the Board of Directors for review.

Authorized Check Signers - authorized signers on school accounts are limited to certain specified individuals as approved by the Board of Directors.

Segregation of Duties relating to financial controls –

The school principal/administrator will be responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The school's on-site administration/faculty and staff will report directly to the principal, who then reports to the Governing Board. The ESP, contracted by the board, will provide bookkeeping, and financial forecasting services to the Governing Board for its oversight and approval.

The Board, at minimum, will be responsible for:

1. reviewing and approving a preliminary annual budget prior to the beginning of the fiscal year;
2. reviewing quarterly financial statements, which include a balance sheet and statement of revenue, expenditures and changes in fund balance, at each public board meeting;
3. annually adopting and maintaining operating budget for the school
4. retaining the services of a certified public accountant/auditor to conduct the annual independent financial audit;
5. reviewing and approving the audit report, including audit findings and recommendations; and
6. reporting to all applicable legal agencies including the charter school's sponsor
7. overseeing the school's principal and all financial matters delegated to the principal

The School will provide the Sponsor with annual audited financial reports as of June 30 of each year. These reports will include a complete set of financial statements and notes thereto prepared in accordance with generally accepted accounting principles for inclusion into the Board's financial statements annually, formatted by revenue source and expenditures and detailed by function and object, as per the Sponsor's timelines.

The School will utilize the standard state codification of accounts as contained in the Financial and Program Cost Accounting and Reporting for Florida Schools, as a means of codifying all transactions pertaining to its operations for both internal and external reporting. Financial reporting will be subject to any directives issued by the State of Florida and the local school district.

C. Describe the method by which accounting records will be maintained.

The School will utilize the standard state codification of accounts as contained in the Financial and Program Cost Accounting and Reporting for Florida Schools, as a means of codifying all transactions pertaining to its operations for both internal and external reporting. Financial reporting will be subject to any directives issued by the State of Florida and Sponsor.

Additionally, these policies, identified in the Board's Policies and Procedures Manual, ensure effective internal controls over revenues, expenses and fixed assets and are evaluated on a monthly basis to ensure compliance with all statutory and regulatory authorities.

Among others, these procedures require the school to:

- Utilize the standard state codification of accounts (Redbook) as a means of codifying all transactions pertaining to its operations for both internal and external reporting; the Board reserves the right to use GAAP in accordance with the Florida Statute.
- Open an operating bank account and a school fundraising account with an FDIC insured institution
- Record transactions managed by these accounts in a QuickBooks or similar program
- Reconcile monthly reports and bank statements and keep in monthly binders at the school
- Record and log all cash and checks received and deposit daily.
- Require dual signatures for all checks over \$2500.00, as established by the Board
- Prepare disbursement voucher packages at school-site as authorized by the Principal and submit to ESP with appropriate supporting documentation
- Make disbursements only to authorized/approved vendors
- Conduct physical property inventories at the beginning and end of every school year to safeguard fixed assets.
- Categorize, label, and record all fixed assets in an Inventory Log which is updated throughout the school year as items are purchased and disposed
- Follow the procedures for proper disposal and inventory as detailed in the Internal Accounting Manual
- Retain documents for a specified amount of time

D. Describe how the school will store student and financial records.

The School will maintain both student and financial records in accordance with Chapter 119, Florida Statutes. Retention schedules established by the records and information management program of the Division of Library and Information Services of the Department of State will be followed.

The school maintains both active and archival records for current and former students in accordance with federal, state, local laws and with the regulations prescribed by the Florida Department of Education. The school ensures that all student records are kept confidential as required by applicable law.

All permanent records of students leaving the school, whether by graduation or transfer to another sponsoring district school are transferred to the sponsoring district school in which the student is enrolled. All students leaving the school to attend an out-of county school or a private educational institution shall have a copy of their permanent record forwarded to the school in which the student is enrolled. All permanent records remain in the last school in which the student was enrolled.

All student and financial records are kept in locked, fireproof cabinets or in a fireproofed locked records storage vault. Only certain school personnel have access to student records, and computerized student records are backed up regularly and stored in a secure area.

Financial Data Security - financial data will be maintained on a secured system/network. Only the School Director and authorized representatives of the Board of Directors have access to the data. Appropriate file backups and physical records will be maintained in a secure environment.

E. Describe the insurance coverage the school will obtain, including applicable health, workers compensation, general liability, property insurance and directors and officers liability coverage.

The School will maintain insurance coverage limits that either meet or exceed the District minimum insurance limit requirements. The School's insurance shall cover the School (and its subcontractors, to the extent that it is not otherwise insured) for those sources of liability which would be covered by the latest edition of the standard Workers' Compensation Policy, as filed for use in Florida by the National Council on Compensation Insurance, without restrictive endorsements as stated in the Florida Workers' Compensation Act.

Minimum Limits: There shall be no maximum limit on the amount of coverage for liability imposed by the Florida Workers' Compensation Act or any other coverage customarily insured under Part 1 of the standard Worker's Compensation Policy.

The minimum amount of coverage for those customarily insured under Part 2 of the standard Worker's Compensation Policy shall be:

EL Each Accident: \$500,000; EL Each Disease-Policy Limit: \$500,000; EL Disease-Each Employee: \$500,000

Insurance limits and deductibles are as follows:

- General Liability Limit - \$1,000,000/\$3,000,000 Deductible: \$0
- Auto or Hired Non-Owned Auto Liability Limit - \$1,000,000 Deductible: \$0
- Educators Legal Liability and Employment Practices - Limit: \$1,000,000 Deductible: \$2,500 Aggregate: \$2,000,000
- Umbrella/Excess Liability Limit: \$10,000,000 Deductible: \$10,000
- Crime Coverage – Limit: \$1,000,000 Deductible: \$25,000
- Comprehensive Property Coverage – Limit: 100% TIV Deductible: Named Windstorm 5% of TIV, \$5,000 All other Perils

The insurance carrier has AM Best financial rating of A XII, with over \$1 billion in retained earnings according to AM Best.

For Worker's Compensation: Aon Risk Services, Inc. of FL is licensed in the State of FL and Illinois National Insurance Company is rated "A (Excellent)" by AM Best Company.

Section 19: Action Plan

A. *Present a timetable for the school's start-up, including but not limited to the following key activities:*

- i. Identifying and securing facility*
- ii. Recruiting and hiring staff*
- iii. Staff training*
- iv. Finalizing curriculum and other instructional materials*
- v. Governing Board training (if necessary)*
- vi. Policy Adoption by Board (if necessary)*
- vii. Enrollment Lottery, if necessary*
- viii. Acquire furniture, fixtures, equipment*
- ix. Acquire instructional materials and technology*
- x. Student enrollment*

The activities included should align with the start-up budget described earlier in the application. If an activity will be paid for by a source of funding not included in the start-up budget, it should be clearly indicated. (This timetable is a projection and is not meant to be binding on the school or sponsor)

The school's projected timetable for start-up is as follows:

PROJECTED START-UP TIMELINE

Already obtained	Applying for and securing appropriate legal status
May 1, 2015	Early submission of draft charter school application proposal (if applicable)
May 1 st - July 1 st	Sponsor Review and feedback to Applicant of draft application (if applicable)
August 3, 2015	Submission of charter school application proposal
August - September	Application Review and Board Interviews
September	School Board consideration of Application Grant Solicitation
September-December	Contract Negotiations with School District
December - January	Grant Preparation
October-January	Marketing and Student Recruitment
March 2016	Finalizing curriculum and other instructional materials
January	Initial Recruitment of Faculty and Staff
January-February	Apply to Sponsor for approval of articulation agreement between SCPA and SCPAMS
Nov 1-Feb 1	Student Registration/Application Period
Feb 5	Student Enrollment Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted.
Feb 6	Second Registration/Application Period Begins
June 1	Vendor Contracts Finalized (food service, uniforms, etc)
June 15 th	Students who have registered will be officially enrolled. If number of applicants exceeds capacity, Lottery will be conducted.
May-June 20	Finalize Registrations and Master Schedule
May- June	Curriculum Planning and Purchasing of Materials Technology and School Furniture Purchasing Finalize Staff Recruitment and Hiring
June- July	Preparation of Facilities Finalize Faculty and Staff Hiring Policy Adoption by Board as needed Governing Board Training/Fingerprinting as needed
July- Aug	Conduct Final Facilities and Safety Inspections Staff Training (Summer Institutes) Teacher fingerprinting, drug-testing, and background checks completed.
July-August 2016	Textbook and Furniture distribution and inventory Final Curriculum Review with lead staff Faculty Orientation Workshops – PD Student/Parent Orientations Classes Commence as per Sponsor Calendar

School-Emergency Management and Recovery Plan - The School will implement a Security Action Plan articulated in its Employee Handbook that prepares all staff for unanticipated events including but not limited to: medical, fire, hazardous, weather security, etc. The School will cooperate with the District to provide the safest school possible for the staff and students, and will incorporate all the applicable and appropriate District-approved emergency efforts in order to maintain a safe school environment. Accordingly, the School will adopt the emergency plans for fire, hurricane, tornado, and child safety currently in effect within the District.

All staff members will be trained regarding procedures for disaster preparedness plans outlining procedures for emergency situations and natural disasters. Staff will be trained to implement an action plan within an emergency situation. Both students and staff will be trained in planning for these events through routine drills and practice. Procedures and plans will be provided to teachers and the staff through the employee handbook, and parents and community members will receive information regarding emergency procedures via newsletters and parent meetings.

The Governing Board and the School will ensure that all provisions of the Jessica Lunsford Act (1012.465.F.S.) are adhered to at the school in ensuring the safety of all faculty, staff and students on the property.

V. STATEMENT OF ASSURANCES

This form must be signed by a duly authorized representative of the applicant group and submitted with the application for a charter school.

As the authorized representative of the applicant group, I hereby certify that the information submitted in this application for a charter for Somerset College Prep Academy Middle School is accurate and true to the best of my knowledge and belief; and further, I certify that, if awarded a charter, the school:

- Will be nonsectarian in its programs, admission policies, employment practices and operations.
- Will enroll any eligible student who submits a timely application, unless the school receives a greater number of applications than there are spaces for students, in which case students will be admitted through a random selection process.
- Will adhere to the antidiscrimination provisions of section 1000.05, F.S.
- Will adhere to all applicable provision of state and federal law relating to the education of students with disabilities, including the Individuals with Disabilities Education Act; section 504 of the Rehabilitation Act of 1974; and Title II of the Americans with Disabilities Act of 1990.
- Will adhere to all applicable provisions of federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974.
- Will participate in the statewide assessment program created under section 1008.22, F.S.
- Will comply with Florida statutes relating to public records and public meetings, including Chapter 119, Florida Statutes, and section 286.011, F.S., which are applicable to applicants even prior to being granted a charter.
- Will obtain and keep current all necessary permits, licenses and certifications related to fire, health and safety within the building and on school property.
- Will provide for an annual financial audit in accordance with section 218.39, F.S.

The governing board, at its discretion, allows David Concepcion (name), Governing Board Chair (title) to sign as the legal correspondent for the school.

Signature



e 11/30/11
Date

David Concepcion
Printed Name

Addendum B - Applicant History Worksheet
Schools Currently or Previously Operated by Governing Board

Rule 6A-6.0786
August 2015

Somerset Academy, Inc.			Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure, with supporting documentation if applicable.	Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fldoe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating
2015 (Most Recent Year)								
District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy (Miami-Dade)	13-0520	Active	590/65%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	Active	211/66%	N/A	N/A	N/A	N/A
Dade	Somerset Academy (Silver Palms)	13-0332	Active	623/84%	N/A	N/A	N/A	N/A
Dade	Somerset Academy High School (Miami-Dade)	13-7042	Active	347/76%	N/A	N/A	N/A	N/A
Dade	Somerset Academy High School (South Campus)	13-7038	Active	30/83%	N/A	N/A	N/A	N/A
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	Active	669/80%	N/A	N/A	N/A	N/A
Dade	Somerset City Arts Academy	13-2012	Active	363/69%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Middle School (Country Palms)	13-6043	Active	35/74%	N/A	N/A	N/A	N/A
Dade	Somerset Oaks Academy	13-3033	Active	293/82%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	Active	451/16%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Middle School (South Miami)	13-6053	Active	152/17%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	Active	488/85%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	Active	222/77%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	Active	110/87%	N/A	N/A	N/A	N/A
Dade	Somerset Gables Academy	13-5008	Active	412/15%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Bay	13-5062	Active	249/16%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Bay Middle School	13-6128	Active	42/24%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Virtual Middle High School	13-6016	Active	20/25%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Middle School (Country Palms)	06-5151	Active	827/34%	N/A	N/A	N/A	N/A
Broward	Somerset Academy	06-5141	Active	938/32%	N/A	N/A	N/A	N/A
Broward	Somerset Academy High School	06-5221	Active	1,101/45%	N/A	N/A	N/A	N/A
Broward	Somerset Arts Conservatory	06-5396	Active	116/36%	N/A	N/A	N/A	N/A
Broward	Somerset Academy (Miramar Campus)	06-5405	Active	644/64%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	Active	439/65%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Miramar South	06-5054	Active	105/43%	N/A	N/A	N/A	N/A
Broward	Somerset Academy (Davie)	06-5211	Active	150/59%	N/A	N/A	N/A	N/A
Broward	Somerset Academy East Preparatory	06-5391	Active	289/87%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Hollywood	06-5387	Active	49/78%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Hollywood Middle School	06-5419	Active	11/82%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Village	06-5004	Active	235/93%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Village Charter Middle School	06-5002	Active	116/90%	N/A	N/A	N/A	N/A
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	Active	701/92%	N/A	N/A	N/A	N/A

Addendum B - Applicant History Worksheet
Schools Currently or Previously Operated by Governing Board

Rule 6A-6.0786
August 2015

Somerset Academy, Inc.			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fldoe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with
2014							
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy (Miami-Dade)	13-0520	571/59%	B	\$495,667	11%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	230/67%	A	\$487,286	32%	No
Dade	Somerset Academy (Silver Palms)	13-0332	631/81%	A	\$100,385	2%	No
Dade	Somerset Academy High School (Miami-Dade)	13-7042	345/78%	A	\$287,250	11%	No
Dade	Somerset Academy High School (South Campus)	13-7038	30/73%	A	\$102,599	51%	No
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	640/82%	B	\$100,385	2%	No
Dade	Somerset City Arts Academy	13-2012	315/62%	C	\$174,426	6%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	28/64%	A	\$105,126	55%	No
Dade	Somerset Oaks Academy	13-3033	69/57%	N/A	\$114,845	23%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	475/16%	A	\$897,039	21%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	115/8%	A	\$216,837	29%	No
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	445/76%	B	\$1,041,118	29%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	184/78%	A	\$268,177	22%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	79/75%	C	\$64,060	12%	No
Dade	Somerset Gables Academy	13-5008	294/10%	A	\$414,716	13%	No
Dade	Somerset Academy Bay	13-5062	218/12%	A	\$184,773	7%	No
Dade	Somerset Academy Bay Middle School	13-6128	25/16%	A	\$13,708	7%	No
Dade	Somerset Academy Virtual Middle High School	13-6016	N/A	N/A			No
Dade	Somerset Academy Middle School (Country Palms)	06-5151	870/33%	A	\$406,144	7%	No
Broward	Somerset Academy	06-5141	938/31%	A	\$1,453,590	12%	No
Broward	Somerset Academy High School	06-5221	1,030/40%	A	\$886,551	12%	No
Broward	Somerset Arts Conservatory	06-5396	129/39%	A	\$919,127	106%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	670/57%	A	\$2,740,540	48%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	449/65%	A	\$853,029	27%	No
Broward	Somerset Academy Miramar South	06-5054	78/41%	N/A	\$421,597	70%	No
Broward	Somerset Academy (Davie)	06-5211	144/45%	A	\$921,834	77%	No
Broward	Somerset Academy East Preparatory	06-5391	289/78%	A	\$1,148,905	48%	No
Broward	Somerset Academy Hollywood	06-5387	80/81%	F	\$55,240	7%	No
Broward	Somerset Academy Hollywood Middle School	06-5419	15/80%	A	\$4,733	5%	No
Broward	Somerset Academy Village	06-5004	284/94%	C	\$794,251	33%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	128/91%	C	\$242,720	22%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	786/97%	D	\$1,000,581	16%	No

Addendum B - Applicant History Worksheet
Schools Currently or Previously Operated by Governing Board

Rule 6A-6.0786
August 2015

Somerset Academy, Inc.			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.flde.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If
2013							
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy (Miami-Dade)	13-0520	175/49%	A	\$148,938	4%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	222/50%	A	\$359,633	26%	No
Dade	Somerset Academy (Silver Palms)	13-0332	637/84%	A	\$187,858	4%	No
Dade	Somerset Academy High School (Miami-Dade)	13-7042	343/80%	A	\$403,913	17%	No
Dade	Somerset Academy High School (South Campus)	13-7038	4/100%	N/A	\$71,115	261%	No
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	612/85%	B	\$187,858	4%	No
Dade	Somerset City Arts Academy	13-2012	296/30%	C	\$132,946	5%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	38/24%	C	\$68,963	30%	No
Dade	Somerset Oaks Academy	13-3033	54/24%	N/A	\$46,073	8%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	476/15%	A	\$598,933	15%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	131/18%	A	\$147,518	19%	No
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	315/73%	B	\$551,280	22%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	134/75%	A	\$200,615	25%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	41/78%	N/A	\$15,896	3%	No
Dade	Somerset Gables Academy	13-5008	231/4%	N/A	\$321,017	14%	No
Dade	Somerset Academy Bay	13-5062	N/A	N/A			No
Dade	Somerset Academy Bay Middle School	13-6128	N/A	N/A			No
Dade	Somerset Academy Virtual Middle High School	13-6016	N/A	N/A			No
Dade	Somerset Academy Middle School (Country Palms)	06-5151	868/32	A	\$419,022	8%	No
Broward	Somerset Academy	06-5141	895/36%	A	\$227,621	2%	No
Broward	Somerset Academy High School	06-5221	853/36	A	\$702,884	12%	No
Broward	Somerset Arts Conservatory	06-5396	163/37%	A	\$695,169	69%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	722/63%	A	\$2,490,987	13%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	391/68%	A	\$512,017	20%	No
Broward	Somerset Academy Miramar South	06-5054	79/57%	N/A	\$208,570	37%	No
Broward	Somerset Academy (Davie)	06-5211	149/36%	A	\$778,162	72%	No
Broward	Somerset Academy East Preparatory	06-5391	297/80%	A	\$942,097	42%	No
Broward	Somerset Academy Hollywood	06-5387	N/A	N/A			No
Broward	Somerset Academy Hollywood Middle School	06-5419	N/A	N/A			No
Broward	Somerset Academy Village	06-5004	302/89%	C	\$715,931	32%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	161/87%	D	\$91,322	7%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	788/91%	C	\$463,756	8%	No

Addendum B - Applicant History Worksheet
Schools Currently or Previously Operated by Governing Board

Rule 6A-6.0786
August 2015

Somerset Academy, Inc.				Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fldoe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes,"
2012								
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)	
Dade	Somerset Academy (Miami-Dade)	13-0520	546/57%	A	\$159,511	4%	No	
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	227/54%	A	\$304,650	22%	No	
Dade	Somerset Academy (Silver Palms)	13-0332	623/82%	A	\$282,124	6%	No	
Dade	Somerset Academy High School (Miami-Dade)	13-7042	366/82%	A	\$494,331	20%	No	
Dade	Somerset Academy High School (South Campus)	13-7038	5/100%	N/A	\$85,648	221%	No	
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	479/82%	A	\$282,124	6%	No	
Dade	Somerset City Arts Academy	13-2012	243/52%	B	\$118,820	6%	No	
Dade	Somerset Academy Middle School (Country Palms)	13-6043	18/61%	N/A	\$70,062	39%	No	
Dade	Somerset Oaks Academy	13-3033	18/39%	N/A	\$30,194	21%	No	
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	456/14%	A	\$504,433	13%	No	
Dade	Somerset Academy Middle School (South Miami)	13-6053	116/15%	A	\$81,818	12%	No	
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	316/73%	B	\$440,096	19%	No	
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	114/72%	B	\$185,352	27%	No	
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	20/70%	N/A	\$1,516	1%	No	
Dade	Somerset Gables Academy	13-5008	75/1%	N/A	\$290,359	26%	No	
Dade	Somerset Academy Bay	13-5062	N/A	N/A			No	
Dade	Somerset Academy Bay Middle School	13-6128	N/A	N/A			No	
Dade	Somerset Academy Virtual Middle High School	13-6016	N/A	N/A			No	
Dade	Somerset Academy Middle School (Country Palms)	06-5151	842/38%	A	\$70,062	39%	No	
Broward	Somerset Academy	06-5141	886/35%	A	\$80,856	1%	No	
Broward	Somerset Academy High School	06-5221	755/43%	A	\$37,014	1%	No	
Broward	Somerset Arts Conservatory	06-5396	91/47%	A	\$421,087	75%	No	
Broward	Somerset Academy (Miramar Campus)	06-5405	811/62%	A	\$2,260,864	37%	No	
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	357/67%	A	\$388,429	17%	No	
Broward	Somerset Academy Miramar South	06-5054	N/A	N/A	\$2,260,864	37%	No	
Broward	Somerset Academy (Davie)	06-5211	141/40%	A	\$695,352	67%	No	
Broward	Somerset Academy East Preparatory	06-5391	299/82%	A	\$689,025	31%	No	
Broward	Somerset Academy Hollywood	06-5387	N/A	N/A			No	
Broward	Somerset Academy Hollywood Middle School	06-5419	N/A	N/A			No	
Broward	Somerset Academy Village	06-5004	348/83%	C	\$619,330	25%	No	
Broward	Somerset Academy Village Charter Middle School	06-5002	141/84%	C	\$111,142	10%	No	
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	687/85%	C	\$195,071	4%	No	

**Addendum C - Applicant Worksheet History
Schools Previously Operated
by Management Company**

**Form IEPC-M1A
Rule 6A-6.0786
August 2015**

District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	Active	488/85%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	Active	222/77%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	Active	110/87%	N/A	N/A	N/A	N/A
Dade	Somerset Gables Academy	13-5008	Active	412/15%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Bay	13-5062	Active	249/16%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Bay Middle School	13-6128	Active	42/24%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Virtual Middle High School	13-6016	Active	20/25%	N/A	N/A	N/A	N/A
Dade	Somerset Academy Middle School (Country Palms)	06-5151	Active	827/34%	N/A	N/A	N/A	N/A
Broward	Somerset Academy	06-5141	Active	938/32%	N/A	N/A	N/A	N/A
Broward	Somerset Academy High School	06-5221	Active	1,101/45%	N/A	N/A	N/A	N/A
Broward	Somerset Arts Conservatory	06-5396	Active	116/36%	N/A	N/A	N/A	N/A
Broward	Somerset Academy (Miramar Campus)	06-5405	Active	644/64%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	Active	439/65%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Miramar South	06-5054	Active	105/43%	N/A	N/A	N/A	N/A
Broward	Somerset Academy (Davie)	06-5211	Active	150/59%	N/A	N/A	N/A	N/A
Broward	Somerset Academy East Preparatory	06-5391	Active	289/87%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Hollywood	06-5387	Active	49/78%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Hollywood Middle School	06-5419	Active	11/82%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Village	06-5004	Active	235/93%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Village Charter Middle School	06-5002	Active	116/90%	N/A	N/A	N/A	N/A
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	Active	701/92%	N/A	N/A	N/A	N/A
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	Active	215/84%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Neighborhood School	06-5021	Active	515/73%	N/A	N/A	N/A	N/A
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	Active	334/75%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	Active	282/66%	N/A	N/A	N/A	N/A
Broward	Somerset Pines Academy	06-5030	Active	484/71%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Pompano	06-5388	Active	165/81%	N/A	N/A	N/A	N/A
Broward	Somerset Academy Pompano Middle School	06-5413	Active	24/83%	N/A	N/A	N/A	N/A
Broward	Ben Gamla Charter School	06-5410	Active	589/50%	N/A	N/A	N/A	N/A
Broward	Ben Gamla Charter School (North Campus)	06-5001	Active	76/71%	N/A	N/A	N/A	N/A
Broward	Ben Gamla South Broward	06-5392	Active	379/60%	N/A	N/A	N/A	N/A
Broward	Ben Gamla Charter School (Hallandale Campus)	06-5025	Active	12/58%	N/A	N/A	N/A	N/A
Broward	Ben Gamla Charter High School	06-5005	Active	128/53%	N/A	N/A	N/A	N/A
Orange	Cornerstone Charter Academy	48-0133	Active	916/9%	N/A	N/A	N/A	N/A
Orange	Cornerstone Charter High School	48-0146	Active	355/11%	N/A	N/A	N/A	N/A
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	Active	226/12%	N/A	N/A	N/A	N/A
Orange	Pinecrest Creek Academy	48-0203	Active	208/22%	N/A	N/A	N/A	N/A
Duval	Somerset Academy (Eagle Campus)	16-1251	Active	219/12%	N/A	N/A	N/A	N/A
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	Active	109/16%	N/A	N/A	N/A	N/A
Duval	Somerset Academy High School (Eagle Campus)	16-1381	Active	28/14%	N/A	N/A	N/A	N/A
Duval	Somerset Preparatory Academy	16-5501	Active	356/23%	N/A	N/A	N/A	N/A
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	Active	286/0%	N/A	N/A	N/A	N/A
Palm Beach	Somerset Academy Boca	50-3413	Active	318/0%	N/A	N/A	N/A	N/A
Palm Beach	Somerset Academy Boca Middle	50-4041	Active	41/0%	N/A	N/A	N/A	N/A
Palm Beach	Somerset Academy Middle School	50-4012	Active	748/0%	N/A	N/A	N/A	N/A
Palm Beach	Somerset Academy Canyons High School	50-4013	Active	242/0%	N/A	N/A	N/A	N/A
St. Lucie	Somerset College Preparatory Academy	56-0712	Active	291/44%	N/A	N/A	N/A	N/A
Monroe	Key West Collegiate School	44-0382	Active	77/5%	N/A	N/A	N/A	N/A
Dade	Excelsior Language Academy of Hialeah	13-5029	Active	--	--	--	--	--
Dade	Excelsior Academy High School	13-7054	Active	--	--	--	--	--
Brevard	Odyssey Charter School	05-6507	Active	--	--	--	--	--
Brevard	Palm Bay Community Charter	05-6519	Closed*	N/A	N/A	N/A	N/A	N/A
Brevard	Palm Bay Municipal Charter High School	05-6520	Closed*	N/A	N/A	N/A	N/A	N/A
Orange	Pinecrest Preparatory Charter High School (Orlando Campus)	48-0162	Closed*	N/A	N/A	N/A	N/A	N/A
Pinellas	Ben Gamla Charter School	52-7321	Closed*	N/A	N/A	N/A	N/A	N/A
Monroe	Key West Montessori Charter School	44-0351	Active	--	--	--	--	--

*See supporting documentation

-- School did not have service agreement with ESP

**Addendum C - Applicant Worksheet History
Schools Previously Operated
by Management Company**

**Form IEPC-M1A
Rule 6A-6.0786
August 2015**

ACADEMICA			Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with	Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by	Applicant should indicate whether the independent financial audit included any of the following findings: financial
District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	Active	747/91%	A	\$2,824,936	48%	No
Dade	Mater Academy East Charter School	13-3100	Active	627/87%	A	\$2,431,290	48%	No
Dade	Mater Academy East Charter Middle School	13-6009	Active	355/96%	C	\$691,613	28%	No
Dade	Mater Academy East Charter High School	13-7037	Active	355/93%	B	\$300,020	12%	No
Dade	Mater Academy of International Studies	13-1017	Active	560/97%	A	\$570,624	13%	No
Dade	Mater Academy Middle School of International Studies	13-6047	Active	150/93%	A	\$223,174	19%	No
Dade	Mater Academy High School of International Studies	13-7024	Active	25/92%	B	\$423,645	224%	No
Dade	Mater Academy Middle School	13-6012	Active	1,351/83%	A	\$2,786,060	29%	No
Dade	Mater Academy High School	13-7160	Active	1,709/81%	A	\$3,092,787	24%	No
Dade	Mater Performing Arts & Entertainment Academy	13-7014	Active	238/74%	A	\$441,918	26%	No
Dade	Mater Gardens Academy Elementary School	13-0312	Active	570/52%	A	\$129,966	3%	No
Dade	Mater Gardens Academy Middle School	13-6042	Active	231/55%	A	\$84,830	5%	No
Dade	Mater Lakes Academy Middle School	13-6033	Active	792/77%	A	\$1,630,634	31%	No
Dade	Mater Lakes Academy High School	13-7018	Active	1,007/73%	A	\$3,218,282	45%	No
Dade	Mater Academy (Miami Beach)	13-5047	Active	537/69%	B	\$771,702	17%	No
Dade	Mater Academy High School (Miami Beach)	13-7025	Active	17/82%	C	\$36,522	24%	No
Dade	Mater Grove Academy	13-5045	Active	134/39%	A	\$238,986	24%	No
Dade	Mater Brickell Preparatory School	13-5046	Active	171/25%	A	\$214,693	17%	No
Dade	Mater Academy at Mt. Sinai	13-5054	Active	105/57%	N/A	\$191,116	18%	No
Dade	iMater Academy	13-5384	Active	389/95%	B	\$75,244	2%	No
Dade	iMater Academy Middle School	13-6014	Active	541/86%	C	\$310,487	9%	No
Dade	iMater Preparatory Academy High School	13-7090	Active	201/82%	C	\$115,111	8%	No
Dade	Mater Academy Virtual Middle School	13-6997	Active	16/56%	N/A	\$6,294	11%	No
Dade	Sports Leadership and Management Charter Middle School	13-6015	Active	441/83%	C	\$58,001	2%	No
Dade	Sports Leadership and Management Charter High School	13-7016	Active	265/85%	C	\$149,664	8%	No
Dade	Ben Gamla Charter School	13-5022	Active	241/34%	A	\$70,870	4%	No
Dade	City of Hialeah Educational Academy	13-7262	Active	571/89%	A	\$494,184	12%	No
Dade	Doral Academy	13-3030	Active	1,140/39%	A	\$3,807,527	39%	No
Dade	Just Arts and Management Middle School	13-6083	Active	100/41%	A	\$123,415	15%	No
Dade	Doral Academy of Technology	13-3029	Active	186/43%	A	\$677,361	51%	No
Dade	Doral Academy Charter Middle School	13-6030	Active	1,321/58%	A	\$3,089,055	32%	No
Dade	Doral Academy Charter High School	13-7020	Active	1,384/60%	B	\$141,204	1%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	Active	331/51%	A	\$103,635	4%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	Active	245/99%	C	-\$50,032	-2%	No
Dade	Integrated Science and Asian Culture Academy	13-2004	Active	25/12%	A	\$97,670	52%	No
Dade	International Studies Charter Middle School	13-6045	Active	299/64%	A	\$280,960	14%	No
Dade	International Studies Charter High School	13-7007	Active	405/60%	A	\$201,304	17%	No
Dade	International Studies Virtual Academy	13-6017	Active	N/A	N/A	N/A	N/A	N/A
Dade	Miami Children's Museum Charter School	13-4000	Active	307/41%	A	\$1,687,875	75%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	Active	650/50%	A	\$1,592,406	30%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	Active	604/57%	A	\$602,808	14%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	Active	412/67%	A	\$471,723	16%	No
Dade	Pinecrest Academy South Campus	13-0342	Active	732/61%	A	\$1,340,997	20%	No
Dade	Pinecrest Palm Academy	13-4634	Active	18/0%	N/A	\$6,987	5%	No
Dade	Pinecrest Academy (North Campus)	13-5048	Active	415/62%	A	\$447,185	13%	No
Dade	Pinecrest Academy Middle School (North Campus)	13-6003	Active	22/73%	A	\$14,106	10%	No
Dade	Pinecrest Cove Academy	13-5049	Active	715/53%	A	\$495,063	9%	No
Dade	Somerset Academy (Miami-Dade)	13-0520	Active	571/59%	B	\$495,667	11%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	Active	230/67%	A	\$487,286	32%	No
Dade	Somerset Academy (Silver Palms)	13-0332	Active	631/81%	A	\$100,385	2%	No
Dade	Somerset Academy High School (Miami-Dade)	13-7042	Active	345/78%	A	\$287,250	11%	No
Dade	Somerset Academy High School (South Campus)	13-7038	Active	30/73%	A	\$102,539	51%	No
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	Active	640/82%	B	\$100,385	2%	No
Dade	Somerset City Arts Academy	13-2012	Active	315/62%	C	\$174,426	6%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	Active	28/64%	A	\$105,126	55%	No
Dade	Somerset Oaks Academy	13-3033	Active	69/57%	N/A	\$114,845	23%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	Active	475/16%	A	\$897,039	21%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	Active	115/8%	A	\$216,837	29%	No

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District	School Name	MSID	Status (Active/Closed)	Enrollment / FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	Active	445/76%	B	\$1,041,118	29%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	Active	184/78%	A	\$268,177	22%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	Active	79/75%	C	\$64,060	12%	No
Dade	Somerset Gables Academy	13-5008	Active	294/10%	A	\$414,716	13%	No
Dade	Somerset Academy Bay	13-5062	Active	218/12%	A	\$184,773	7%	No
Dade	Somerset Academy Bay Middle School	13-6128	Active	25/16%	A	\$13,708	7%	No
Dade	Somerset Academy Virtual Middle High School	13-6016	Active	N/A	N/A	N/A	N/A	N/A
Dade	Somerset Academy Middle School (Country Palms)	06-5151	Active	870/33%	A	\$406,144	7%	No
Broward	Somerset Academy	06-5141	Active	938/31%	A	\$1,453,590	12%	No
Broward	Somerset Academy High School	06-5221	Active	1,030/40%	A	\$886,551	12%	No
Broward	Somerset Arts Conservatory	06-5396	Active	129/39%	A	\$919,127	106%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	Active	670/57%	A	\$2,740,540	48%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	Active	449/65%	A	\$853,029	27%	No
Broward	Somerset Academy Miramar South	06-5054	Active	78/41%	N/A	\$421,597	70%	No
Broward	Somerset Academy (Davie)	06-5211	Active	144/45%	A	\$921,834	77%	No
Broward	Somerset Academy East Preparatory	06-5391	Active	289/78%	A	\$1,148,905	48%	No
Broward	Somerset Academy Hollywood	06-5387	Active	80/81%	F	\$55,240	7%	No
Broward	Somerset Academy Hollywood Middle School	06-5419	Active	15/80%	A	\$4,733	5%	No
Broward	Somerset Academy Village	06-5004	Active	284/94%	C	\$794,251	33%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	Active	128/91%	C	\$242,720	22%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	Active	786/97%	D	\$1,000,581	16%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	Active	192/97%	C	\$240,495	18%	No
Broward	Somerset Academy Neighborhood School	06-5021	Active	504/74%	A	\$1,453,590	12%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	Active	337/72%	A	\$364,722	16%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	Active	251/76%	B	\$146,198	8%	No
Broward	Somerset Pines Academy	06-5030	Active	477/65%	B	\$604,299	17%	No
Broward	Somerset Academy Pompano	06-5388	Active	159/79%	F	\$50,735	4%	No
Broward	Somerset Academy Pompano Middle School	06-5413	Active	23/96%	B	\$36,031	20%	No
Broward	Ben Gamla Charter School	06-5410	Active	579/47%	B	\$110,354	2%	No
Broward	Ben Gamla Charter School (North Campus)	06-5001	Active	75/69%	A	\$1,737	0%	No
Broward	Ben Gamla South Broward	06-5392	Active	386/49%	B	\$3,525	0%	No
Broward	Ben Gamla Charter School (Hallandale Campus)	06-5025	Active	28/50%	C	\$26,451	14%	No
Broward	Ben Gamla Charter High School	06-5005	Active	123/41%	C	\$4,150	1%	No
Orange	Cornerstone Charter Academy	48-0133	Active	892/3%	A	\$1,092,169	16%	No
Orange	Cornerstone Charter High School	48-0146	Active	314/0%	A	\$216,744	10%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	Active	209/50%	A	\$159,511	10%	No
Orange	Pinecrest Creek Academy	48-0203	Active	231/0%	F	\$39,561	2%	No
Duval	Somerset Academy (Eagle Campus)	16-1251	Active	259/51%	C	\$50,287	2%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	Active	136/46%	B	-\$39,931	-4%	No
Duval	Somerset Academy High School (Eagle Campus)	16-1381	Active	21/52%	F	\$21,832	9%	No
Duval	Somerset Preparatory Academy	16-5501	Active	211/55%	F	\$186,117	35%	No
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	Active	281/21%	A	\$186,081	9%	No
Palm Beach	Somerset Academy Boca	50-3413	Active	284/24%	B	\$221,279	10%	No
Palm Beach	Somerset Academy Boca Middle	50-4041	Active	23/13%	A	\$180	0%	No
Palm Beach	Somerset Academy Middle School	50-4012	Active	546/20%	B	-\$7	0%	No
Palm Beach	Somerset Academy Canyons High School	50-4013	Active	118/23%	B	\$64,568	6%	No
St. Lucie	Somerset College Preparatory Academy	56-0712	Active	211/43%	A	\$24,920	2%	No
Monroe	Key West Collegiate School	44-0382	Active	72/35%	C	\$49,567	8%	No
Dade	Excelsior Language Academy of Hialeah	13-5029	Active	--	--	--	--	--
Dade	Excelsior Academy High School	13-7054	Active	--	--	--	--	--
Brevard	Odyssey Charter School	05-6507	Active	--	--	--	--	--
Brevard	Palm Bay Community Charter	05-6519	Closed*	N/A	N/A	N/A	N/A	N/A
Brevard	Palm Bay Municipal Charter High School	05-6520	Closed*	N/A	N/A	N/A	N/A	N/A
Orange	Pinecrest Preparatory Charter High School (Orlando Campus)	48-0162	Closed*	N/A	N/A	N/A	N/A	N/A
Pinellas	Ben Gamla Charter School	52-7321	Closed*	N/A	N/A	N/A	N/A	N/A
Monroe	Key West Montessori Charter School	44-0951	Active	118/4%	A	\$222,436	19%	No

*See supporting documentation
-- School did not have service agreement with ESP

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ACADEMICA			Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with	Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by	Applicant should indicate whether the independent financial audit included any of the following findings: financial
District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	Active	750/57%	A	\$3,660,198	66%	No
Dade	Mater Academy East Charter School	13-3100	Active	622/86%	A	\$2,021,696	67%	No
Dade	Mater Academy East Charter Middle School	13-6009	Active	331/83%	C	\$722,068	34%	No
Dade	Mater Academy East Charter High School	13-7037	Active	371/80%	A	\$5,513	0%	No
Dade	Mater Academy of International Studies	13-1017	Active	506/88%	D	\$148,241	4%	No
Dade	Mater Academy Middle School of International Studies	13-6047	Active	131/78%	A	\$29,014	3%	No
Dade	Mater Academy High School of International Studies	13-7024	Active	32/81%	A	\$320,569	118%	No
Dade	Mater Academy Middle School	13-6012	Active	1,424/81%	A	\$2,865,856	30%	No
Dade	Mater Academy High School	13-7160	Active	1,654/80%	A	\$3,173,447	28%	No
Dade	Mater Performing Arts & Entertainment Academy	13-7014	Active	189/72%	A	\$1,730,681	134%	No
Dade	Mater Gardens Academy Elementary School	13-0312	Active	617/31%	A	\$23,415	1%	No
Dade	Mater Gardens Academy Middle School	13-6042	Active	185/28%	A	\$61,380	4%	No
Dade	Mater Lakes Academy Middle School	13-6033	Active	721/74%	A	\$1,457,501	33%	No
Dade	Mater Lakes Academy High School	13-7018	Active	926/74%	A	\$2,936,826	51%	No
Dade	Mater Academy (Miami Beach)	13-5047	Active	528/60%	B	\$426,730	10%	No
Dade	Mater Academy High School (Miami Beach)	13-7025	Active	18/72%	N/A	\$17,640	6%	No
Dade	Mater Grove Academy	13-5045	Active	105/50%	B	\$165,712	24%	No
Dade	Mater Brickell Preparatory School	13-5046	Active	154/27%	C	\$72,751	5%	No
Dade	Mater Academy at Mt. Sinai	13-5054	Active	42/36%	N/A	\$163,255	33%	No
Dade	iMater Academy	13-5384	Active	N/A	N/A	N/A	N/A	No
Dade	iMater Academy Middle School	13-6014	Active	N/A	N/A	N/A	N/A	No
Dade	iMater Preparatory Academy High School	13-7090	Active	N/A	N/A	N/A	N/A	No
Dade	Mater Academy Virtual Middle School	13-6997	Active	N/A	N/A	N/A	N/A	No
Dade	Sports Leadership and Management Charter Middle School	13-6015	Active	N/A	N/A	N/A	N/A	No
Dade	Sports Leadership and Management Charter High School	13-7016	Active	26/96%	N/A	\$89,259	43%	No
Dade	Ben Gamla Charter School	13-5022	Active	243/21%	A	\$54,190	3%	No
Dade	City of Hialeah Educational Academy	13-7262	Active	451/88%	A	\$91,177	3%	No
Dade	Doral Academy	13-3030	Active	931/35%	A	\$2,404,538	31%	No
Dade	Just Arts and Management Middle School	13-6083	Active	93/44%	B	\$196,932	26%	No
Dade	Doral Academy of Technology	13-3029	Active	202/46%	A	\$462,681	33%	No
Dade	Doral Academy Charter Middle School	13-6030	Active	931/57%	A	\$2,969,656	59%	No
Dade	Doral Academy Charter High School	13-7020	Active	1,273/56%	A	\$163,741	2%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	Active	307/53%	A	\$116,267	6%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	Active	250/69%	C	\$57,844	2%	No
Dade	Integrated Science and Asian Culture Academy	13-2004	Active	26/15%	N/A	\$90,322	51%	No
Dade	International Studies Charter Middle School	13-6045	Active	262/66%	A	\$52,451	3%	No
Dade	International Studies Charter High School	13-7007	Active	356/62%	A	\$12,912	1%	No
Dade	International Studies Virtual Academy	13-6017	Active	N/A	N/A			No
Dade	Miami Children's Museum Charter School	13-4000	Active	302/24%	B	\$1,454,488	71%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	Active	650/47%	A	\$1,867,187	53%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	Active	694/60%	A	\$723,225	17%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	Active	329/60%	A	\$512,044	25%	No
Dade	Pinecrest Academy South Campus	13-0342	Active	750/59%	A	\$1,455,516	25%	No
Dade	Pinecrest Palm Academy	13-4634	Active	N/A	N/A			No
Dade	Pinecrest Academy (North Campus)	13-5048	Active	419/66%	A	\$221,850	7%	No
Dade	Pinecrest Academy Middle School (North Campus)	13-6003	Active	19/74%	N/A	\$4,488	2%	No
Dade	Pinecrest Cove Academy	13-5049	Active	639/51%	A	\$220,853	5%	No
Dade	Somerset Academy (Miami-Dade)	13-0520	Active	175/49%	A	\$148,938	4%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	Active	222/50%	A	\$359,633	26%	No
Dade	Somerset Academy (Silver Palms)	13-0332	Active	637/84%	A	\$187,858	4%	No
Dade	Somerset Academy High School (Miami-Dade)	13-7042	Active	343/80%	A	\$403,913	17%	No
Dade	Somerset Academy High School (South Campus)	13-7038	Active	4/100%	N/A	\$71,115	261%	No
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	Active	612/85%	B	\$187,858	4%	No
Dade	Somerset City Arts Academy	13-2012	Active	296/30%	C	\$132,946	5%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	Active	38/24%	C	\$68,963	30%	No
Dade	Somerset Oaks Academy	13-3033	Active	54/24%	N/A	\$46,073	8%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	Active	476/15%	A	\$598,933	15%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	Active	131/18%	A	\$147,518	19%	No

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District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	Active	315/73%	B	\$551,280	22%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	Active	134/75%	A	\$200,615	25%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	Active	41/78%	N/A	\$15,896	3%	No
Dade	Somerset Gables Academy	13-5008	Active	231/4%	N/A	\$321,017	14%	No
Dade	Somerset Academy Bay	13-5062	Active	N/A	N/A			No
Dade	Somerset Academy Bay Middle School	13-6128	Active	N/A	N/A			No
Dade	Somerset Academy Virtual Middle High School	13-6016	Active	N/A	N/A			No
Dade	Somerset Academy Middle School (Country Palms)	06-5151	Active	868/32	A	\$419,022	8%	No
Broward	Somerset Academy	06-5141	Active	895/36%	A	\$227,621	2%	No
Broward	Somerset Academy High School	06-5221	Active	853/36	A	\$702,884	12%	No
Broward	Somerset Arts Conservatory	06-5396	Active	163/37%	A	\$695,169	69%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	Active	722/63%	A	\$2,490,987	13%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	Active	391/68%	A	\$512,017	20%	No
Broward	Somerset Academy Miramar South	06-5054	Active	79/57%	N/A	\$208,570	37%	No
Broward	Somerset Academy (Davie)	06-5211	Active	149/36%	A	\$778,162	72%	No
Broward	Somerset Academy East Preparatory	06-5391	Active	297/80%	A	\$942,097	42%	No
Broward	Somerset Academy Hollywood	06-5387	Active	N/A	N/A			No
Broward	Somerset Academy Hollywood Middle School	06-5419	Active	N/A	N/A			No
Broward	Somerset Academy Village	06-5004	Active	302/89%	C	\$715,931	32%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	Active	161/87%	D	\$91,322	7%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	Active	788/91%	C	\$463,756	8%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	Active	144/80%	B	\$115,339	13%	No
Broward	Somerset Academy Neighborhood School	06-5021	Active	468/66%	B	\$227,621	2%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	Active	338/69%	C	\$98,938	5%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	Active	224/73%	B	\$73,426	4%	No
Broward	Somerset Pines Academy	06-5030	Active	429/59%	C	\$356,210	12%	No
Broward	Somerset Academy Pompano	06-5388	Active	145/78%	N/A	\$33,837	3%	No
Broward	Somerset Academy Pompano Middle School	06-5413	Active	N/A	N/A			No
Broward	Ben Gamla Charter School	06-5410	Active	578/47%	A	\$807	0%	No
Broward	Ben Gamla Charter School (North Campus)	06-5001	Active	70/66%	A	\$7,627	2%	No
Broward	Ben Gamla South Broward	06-5392	Active	453/32%	C	\$51,061	2%	No
Broward	Ben Gamla Charter School (Hallandale Campus)	06-5025	Active	18/28%	N/A	\$5,305	5%	No
Broward	Ben Gamla Charter High School	06-5005	Active	100/34%	C	\$12,482	1%	No
Orange	Cornerstone Charter Academy	48-0133	Active	832/17%	B	\$1,068,034	18%	No
Orange	Cornerstone Charter High School	48-0146	Active	233/17%	A	\$25,236	2%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	Active	173/40%	A	\$132,842	10%	No
Orange	Pinecrest Creek Academy	48-0203	Active	123/44%	N/A	\$72,529	8%	No
Duval	Somerset Academy (Eagle Campus)	16-1251	Active	276/41%	B	\$2,062	0%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	Active	135/36%	A	\$21,369	2%	No
Duval	Somerset Academy High School (Eagle Campus)	16-1381	Active	22/45%	N/A	\$24,760	13%	No
Duval	Somerset Preparatory Academy	16-5501	Active	N/A	N/A	N/A	N/A	N/A
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	Active	281/14%	A	\$231,291	11%	No
Palm Beach	Somerset Academy Boca	50-3413	Active	165/19%	N/A	\$119,765	9%	No
Palm Beach	Somerset Academy Boca Middle	50-4041	Active	N/A	N/A	N/A	N/A	No
Palm Beach	Somerset Academy Middle School	50-4012	Active	N/A	N/A	N/A	N/A	No
Palm Beach	Somerset Academy Canyons High School	50-4013	Active	N/A	N/A	N/A	N/A	No
St. Lucie	Somerset College Preparatory Academy	56-0712	Active	112/58%	C	\$16,458	2%	No
Monroe	Key West Collegiate School	44-0382	Active	52/38%	N/A	\$42,059	9%	No
Dade	Excelsior Language Academy of Hialeah	13-5029	Active	--	--	--	--	--
Dade	Excelsior Academy High School	13-7054	Active	--	--	--	--	--
Brevard	Odyssey Charter School	05-6507	Active	758/62%	A	\$1,299,637	22%	No
Brevard	Palm Bay Community Charter	05-6519	Closed*	N/A	N/A	N/A	N/A	N/A
Brevard	Palm Bay Municipal Charter High School	05-6520	Closed*	N/A	N/A	N/A	N/A	N/A
Orange	Pinecrest Preparatory Charter High School (Orlando Campus)	48-0162	Closed*	N/A	N/A	N/A	N/A	N/A
Pinellas	Ben Gamla Charter School	52-7321	Closed*	44/32%	N/A	\$0	0%	N/A
Monroe	Key West Montessori Charter School	44-0351	Active	--	--	--	--	--

*See supporting documentation
-- School did not have service agreement with ESP

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Rule 6A-6.0786
August 2015**

ACADEMICA			Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with	Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by	Applicant should indicate whether the independent financial audit included any of the following findings: financial
District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	Active	750/79%	A	\$7,700,050	147%	No
Dade	Mater Academy East Charter School	13-3100	Active	546/79%	A	\$1,816,205	45%	No
Dade	Mater Academy East Charter Middle School	13-6009	Active	334/93%	C	\$643,190	30%	No
Dade	Mater Academy East Charter High School	13-7037	Active	290/82%	B	\$106,659	5%	No
Dade	Mater Academy of International Studies	13-1017	Active	453/90%	C	\$462,003	13%	No
Dade	Mater Academy Middle School of International Studies	13-6047	Active	123/85%	A	\$112,041	13%	No
Dade	Mater Academy High School of International Studies	13-7024	Active	100/83%	A	\$296,577	47%	No
Dade	Mater Academy Middle School	13-6012	Active	1,454/80%	A	\$4,526,614	49%	No
Dade	Mater Academy High School	13-7160	Active	1,317/79%	A	\$4,077,088	40%	No
Dade	Mater Performing Arts & Entertainment Academy	13-7014	Active	210/74%	A	\$2,364,166	92%	No
Dade	Mater Gardens Academy Elementary School	13-0312	Active	549/51%	A	\$107,442	3%	No
Dade	Mater Gardens Academy Middle School	13-6042	Active	254/65%	A	\$68,620	4%	No
Dade	Mater Lakes Academy Middle School	13-6033	Active	579/76%	A	\$1,026,652	30%	No
Dade	Mater Lakes Academy High School	13-7018	Active	1012/72%	B	\$2,324,047	41%	No
Dade	Mater Academy (Miami Beach)	13-5047	Active	477/68%	A	\$232,588	6%	No
Dade	Mater Academy High School (Miami Beach)	13-7025	Active	17/82%	N/A	\$4,749	4%	No
Dade	Mater Grove Academy	13-5045	Active	126/64%	N/A	\$51,051	5%	No
Dade	Mater Brickell Preparatory School	13-5046	Active	19/42%	N/A	\$22,097	13%	No
Dade	Mater Academy at Mt. Sinai	13-5054	Active	N/A	N/A	N/A	N/A	N/A
Dade	iMater Academy	13-5384	Active	N/A	N/A	N/A	N/A	N/A
Dade	iMater Academy Middle School	13-6014	Active	N/A	N/A	N/A	N/A	N/A
Dade	iMater Preparatory Academy High School	13-7090	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater Academy Virtual Middle School	13-6997	Active	N/A	N/A	N/A	N/A	N/A
Dade	Sports Leadership and Management Charter Middle School	13-6015	Active	N/A	N/A	N/A	N/A	N/A
Dade	Sports Leadership and Management Charter High School	13-7016	Active	N/A	N/A	N/A	N/A	N/A
Dade	Ben Gamla Charter School	13-5022	Active	163/29%	A	\$304	0%	No
Dade	City of Hialeah Educational Academy	13-7262	Active	394/90%	A	\$153,265	6%	No
Dade	Doral Academy	13-3030	Active	795/37%	A	\$2,801,640	47%	No
Dade	Just Arts and Management Middle School	13-6083	Active	N/A	N/A	N/A	N/A	N/A
Dade	Doral Academy of Technology	13-3029	Active	109/40%	A	\$197,102	23%	No
Dade	Doral Academy Charter Middle School	13-6030	Active	1,241/58%	A	\$2,005,491	25%	No
Dade	Doral Academy Charter High School	13-7020	Active	1,163/60%	A	\$949,682	11%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	Active	225/54%	A	\$704,352	49%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	Active	279/89%	D	\$159,554	7%	No
Dade	Integrated Science and Asian Culture Academy	13-2004	Active	26/12%	N/A	\$53,993	32%	No
Dade	International Studies Charter Middle School	13-6045	Active	225/67%	A	\$62,462	4%	No
Dade	International Studies Charter High School	13-7007	Active	353/56%	A	\$38,578	2%	No
Dade	International Studies Virtual Academy	13-6017	Active	N/A	N/A	N/A	N/A	N/A
Dade	Miami Children's Museum Charter School	13-4000	Active	263/49%	A	\$1,243,800	70%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	Active	650/43%	A	\$1,258,446	27%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	Active	772/59%	A	\$578,141	12%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	Active	228/52%	C	\$346,109	25%	No
Dade	Pinecrest Academy South Campus	13-0342	Active	349/58%	A	\$629,658	12%	No
Dade	Pinecrest Palm Academy	13-4634	Active	N/A	N/A	N/A	N/A	No
Dade	Pinecrest Academy (North Campus)	13-5048	Active	389/70%	A	\$142,091	5%	No
Dade	Pinecrest Academy Middle School (North Campus)	13-6003	Active	15/80%	N/A	\$7,199	5%	No
Dade	Pinecrest Cove Academy	13-5049	Active	432/58%	A	\$2,513	0%	No
Dade	Somerset Academy (Miami-Dade)	13-0520	Active	546/57%	A	\$159,511	4%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	Active	227/54%	A	\$304,650	22%	No
Dade	Somerset Academy (Silver Palms)	13-0332	Active	623/82%	A	\$282,124	6%	No
Dade	Somerset Academy High School (Miami-Dade)	13-7042	Active	366/82%	A	\$494,331	20%	No
Dade	Somerset Academy High School (South Campus)	13-7038	Active	5/100%	N/A	\$85,648	221%	No
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	Active	479/82%	A	\$282,124	6%	No
Dade	Somerset City Arts Academy	13-2012	Active	243/52%	B	\$118,820	6%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	Active	18/61%	N/A	\$70,062	39%	No
Dade	Somerset Oaks Academy	13-3033	Active	18/39%	N/A	\$30,194	21%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	Active	456/14%	A	\$504,433	13%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	Active	116/15%	A	\$81,818	12%	No

**Addendum C - Applicant Worksheet History
Schools Previously Operated
by Management Company**

**Form IEP-C-M1A
Rule 6A-6.0786
August 2015**

District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	Active	316/73%	B	\$440,096	19%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	Active	114/72%	B	\$185,352	27%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	Active	20/70%	N/A	\$1,516	1%	No
Dade	Somerset Gables Academy	13-5008	Active	75/1%	N/A	\$290,359	26%	No
Dade	Somerset Academy Bay	13-5062	Active	N/A	N/A	N/A	N/A	N/A
Dade	Somerset Academy Bay Middle School	13-6128	Active	N/A	N/A	N/A	N/A	N/A
Dade	Somerset Academy Virtual Middle High School	13-6016	Active	N/A	N/A	N/A	N/A	N/A
Dade	Somerset Academy Middle School (Country Palms)	06-5151	Active	842/38%	A	\$70,062	39%	No
Broward	Somerset Academy	06-5141	Active	886/35%	A	\$80,856	1%	No
Broward	Somerset Academy High School	06-5221	Active	755/43%	A	\$37,014	1%	No
Broward	Somerset Arts Conservatory	06-5396	Active	91/47%	A	\$421,087	75%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	Active	811/62%	A	\$2,260,864	37%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	Active	357/67%	A	\$388,429	17%	No
Broward	Somerset Academy Miramar South	06-5054	Active	N/A	N/A	\$2,260,864	37%	No
Broward	Somerset Academy (Davie)	06-5211	Active	141/40%	A	\$695,352	67%	No
Broward	Somerset Academy East Preparatory	06-5391	Active	299/82%	A	\$689,025	31%	No
Broward	Somerset Academy Hollywood	06-5387	Active	N/A	N/A	N/A	N/A	N/A
Broward	Somerset Academy Hollywood Middle School	06-5419	Active	N/A	N/A	N/A	N/A	N/A
Broward	Somerset Academy Village	06-5004	Active	348/83%	C	\$619,330	25%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	Active	141/84%	C	\$111,142	10%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	Active	687/85%	C	\$195,071	4%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	Active	114/73%	F	\$30,101	3%	No
Broward	Somerset Academy Neighborhood School	06-5021	Active	441/60%	A	\$80,856	1%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	Active	317/67%	B	\$25,966	5%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	Active	213/54%	A	\$101,535	6%	No
Broward	Somerset Pines Academy	06-5030	Active	380/64%	C	\$325,297	11%	No
Broward	Somerset Academy Pompano	06-5388	Active	N/A	N/A	N/A	N/A	N/A
Broward	Somerset Academy Pompano Middle School	06-5413	Active	N/A	N/A	N/A	N/A	N/A
Broward	Ben Gamla Charter School	06-5410	Active	531/50%	A	-\$213,516	-5%	No
Broward	Ben Gamla Charter School (North Campus)	06-5001	Active	50/64%	B	\$23,990	5%	No
Broward	Ben Gamla South Broward	06-5392	Active	344/34%	C	-\$108,119	-5%	No
Broward	Ben Gamla Charter School (Hallandale Campus)	06-5025	Active	18/28%	N/A	-\$217	0%	No
Broward	Ben Gamla Charter High School	06-5005	Active	40/38%	N/A	\$1,763	1%	No
Orange	Cornerstone Charter Academy	48-0133	Active	738/18%	A	\$600,136	12%	No
Orange	Cornerstone Charter High School	48-0146	Active	201/22%	A	\$9,231	1%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	Active	135/51%	B	\$190,032	16%	No
Orange	Pinecrest Creek Academy	48-0203	Active	N/A	N/A	N/A	N/A	N/A
Duval	Somerset Academy (Eagle Campus)	16-1251	Active	231/32%	A	\$33,131	2%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	Active	111/35%	B	\$120,904	15%	No
Duval	Somerset Academy High School (Eagle Campus)	16-1381	Active	N/A	N/A	N/A	N/A	N/A
Duval	Somerset Preparatory Academy	16-5501	Active	N/A	N/A	N/A	N/A	N/A
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	Active	195/7%	N/A	-\$13,088	-1%	No
Palm Beach	Somerset Academy Boca	50-3413	Active	N/A	N/A	N/A	N/A	N/A
Palm Beach	Somerset Academy Boca Middle	50-4041	Active	N/A	N/A	N/A	N/A	N/A
Palm Beach	Somerset Academy Middle School	50-4012	Active	N/A	N/A	N/A	N/A	N/A
Palm Beach	Somerset Academy Canyons High School	50-4013	Active	N/A	N/A	N/A	N/A	N/A
St. Lucie	Somerset College Preparatory Academy	56-0712	Active	N/A	N/A	N/A	N/A	N/A
Monroe	Key West Collegiate School	44-0382	Active	30/38%	N/A	\$3,502	1%	No
Dade	Excelsior Language Academy of Hialeah	13-5029	Active	577/92%	B	\$36,986	1%	No
Dade	Excelsior Academy High School	13-7054	Closed*	64/95%	B	\$7,406	1%	No
Brevard	Odyssey Charter School	05-6507	Active	625/66%	N/A	\$1,214,409	24%	
Brevard	Palm Bay Community Charter	05-6519	Closed*	N/A	N/A	N/A	N/A	N/A
Brevard	Palm Bay Municipal Charter High School	05-6520	Closed*	N/A	N/A	\$119,893	33%	N/A
Orange	Pinecrest Preparatory Charter High School (Orlando Campus)	48-0162	Closed*	5/0%	N/A	\$27,049	28%	N/A
Pinellas	Ben Gamla Charter School	52-7321	Closed*	N/A	N/A	N/A	N/A	N/A
Monroe	Key West Montessori Charter School	44-0351	Active	--	--	--	--	--

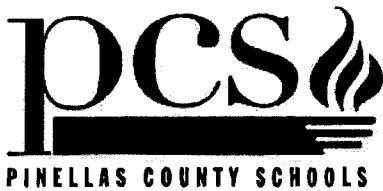
*See supporting documentation
-- School did not have service agreement with ESP

**Addendum C - Applicant Worksheet History
Schools Previously Operated
by Management Company**

**Form IEP-C-M1A
Rule 6A-6.0786
August 2015**

ACADEMICA			Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with	Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by	Applicant should indicate whether the independent financial audit included any of the following findings: financial
District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	Active	738/77%	A	\$7,149,599	123%	No
Dade	Mater Academy East Charter School	13-3100	Active	537/88%	A	\$1,580,822	36%	No
Dade	Mater Academy East Charter Middle School	13-6009	Active	330/88%	C	\$534,073	22%	No
Dade	Mater Academy East Charter High School	13-7037	Active	246/80%	B	\$180,630	8%	No
Dade	Mater Academy of International Studies	13-1017	Active	376/88%	C	\$446,609	14%	No
Dade	Mater Academy Middle School of International Studies	13-6047	Active	114/34%	A	\$30,426	4%	No
Dade	Mater Academy High School of International Studies	13-7024	Active	60/78%	N/A	\$137,131	19%	No
Dade	Mater Academy Middle School	13-6012	Active	1,297/81%	A	\$4,142,879	44%	No
Dade	Mater Academy High School	13-7160	Active	1446/80%	A	\$3,832,251	34%	No
Dade	Mater Performing Arts & Entertainment Academy	13-7014	Active	175/77%	A	\$2,191,607	163%	No
Dade	Mater Gardens Academy Elementary School	13-0312	Active	544/60%	A	\$16,920	0%	No
Dade	Mater Gardens Academy Middle School	13-6042	Active	97/51%	B	\$79,611	7%	No
Dade	Mater Lakes Academy Middle School	13-6033	Active	531/68%	B	\$717,067	20%	No
Dade	Mater Lakes Academy High School	13-7018	Active	597/67%	B	\$1,688,559	39%	No
Dade	Mater Academy (Miami Beach)	13-5047	Active	267/67%	B	\$37,192	2%	No
Dade	Mater Academy High School (Miami Beach)	13-7025	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater Grove Academy	13-5045	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater Brickell Preparatory School	13-5046	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater Academy at Mt. Sinai	13-5054	Active	N/A	N/A	N/A	N/A	N/A
Dade	iMater Academy	13-5384	Active	N/A	N/A	N/A	N/A	N/A
Dade	iMater Academy Middle School	13-6014	Active	N/A	N/A	N/A	N/A	N/A
Dade	iMater Preparatory Academy High School	13-7090	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater Academy Virtual Middle School	13-6997	Active	N/A	N/A	N/A	N/A	N/A
Dade	Sports Leadership and Management Charter Middle School	13-6015	Active	N/A	N/A	N/A	N/A	N/A
Dade	Sports Leadership and Management Charter High School	13-7016	Active	N/A	N/A	N/A	N/A	N/A
Dade	Ben Gamla Charter School	13-5022	Active	79/46%	N/A	\$4,199	1%	No
Dade	City of Hialeah Educational Academy	13-7262	Active	330/81%	A	\$98,852	4%	No
Dade	Doral Academy	13-3030	Active	771/35%	A	\$3,225,836	50%	No
Dade	Just Arts and Management Middle School	13-6083	Active	N/A	N/A	N/A	N/A	N/A
Dade	Doral Academy of Technology	13-3029	Active	N/A	N/A	N/A	N/A	N/A
Dade	Doral Academy Charter Middle School	13-6030	Active	1,000/53%	A	\$1,860,517	27%	No
Dade	Doral Academy Charter High School	13-7020	Active	973/57%	A	\$17,717	0%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	Active	91/63%	A	\$494,020	72%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	Active	261/89%	D	\$1,950	0%	No
Dade	Integrated Science and Asian Culture Academy	13-2004	Active	25/24%	N/A	\$22,405	8%	No
Dade	International Studies Charter Middle School	13-6045	Active	187/74%	A	\$75,335	6%	No
Dade	International Studies Charter High School	13-7007	Active	353/51%	A	\$229,573	9%	No
Dade	International Studies Virtual Academy	13-6017	Active	N/A	N/A	N/A	N/A	N/A
Dade	Miami Children's Museum Charter School	13-4000	Active	244/49%	N/A	\$1,339,478	73%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	Active	650/41%	A	\$1,775,438	34%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	Active	822/49%	A	\$399,183	7%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	Active	163/50%	B	\$233,954	21%	No
Dade	Pinecrest Academy South Campus	13-0342	Active	750/53%	A	\$498,548	8%	No
Dade	Pinecrest Palm Academy	13-4634	Active	N/A	N/A	N/A	N/A	N/A
Dade	Pinecrest Academy (North Campus)	13-5048	Active	340/67%	A	\$100,889	4%	No
Dade	Pinecrest Academy Middle School (North Campus)	13-6003	Active	N/A	N/A	N/A	N/A	N/A
Dade	Pinecrest Cove Academy	13-5049	Active	N/A	N/A	N/A	N/A	N/A
Dade	Somerset Academy (Miami-Dade)	13-0520	Active	527/54%	A	\$153,993	4%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	Active	174/46%	A	\$291,211	24%	No
Dade	Somerset Academy (Silver Palms)	13-0332	Active	948/80%	N/A	\$496,376	7%	No
Dade	Somerset Academy High School (Miami-Dade)	13-7042	Active	286/81%	A	\$692,019	31%	No
Dade	Somerset Academy High School (South Campus)	13-7038	Active	17/82%	N/A	\$105,205	56%	No
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	Active	N/A	N/A	\$496,376	7%	No
Dade	Somerset City Arts Academy	13-2012	Active	209/33%	A	\$28,373	2%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	Active	10/10%	N/A	\$29,985	29%	No
Dade	Somerset Oaks Academy	13-3033	Active	N/A	N/A	N/A	N/A	N/A
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	Active	425/14%	A	\$402,182	9%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	Active	73/8%	A	\$47,509	10%	No

Addendum C - Supporting Documentation



ADMINISTRATION BUILDING
301 Fourth St. SW
P.O. Box 2942
Largo, FL 33779-2942
Ph (727) 588 6000

SCHOOL BOARD OF
PINELLAS COUNTY, FLORIDA
Chairperson
Carol J. Cook

Vice Chairperson
Peggy L. O'Shea

Janet R. Clark
Rene Flowers
Terry Krassner
Linda S. Lerner
Robin L. Wible

Superintendent
Michael A. Grego, Ed.D.

Debra Klein, Board Chair
National Ben Gamla Charter School Foundation
6340 Sunset Drive
Miami, Florida 33143

By Certified U.S. Mail and e-mail

June 18, 2013

Re: Ben Gamla Charter School Pinellas Voluntary Closure

Dear Ms. Klein:

This letter is to serve notice that Pinellas County School District (PCS) accepts the National Ben Gamla Charter School's decision to voluntarily close the Ben Gamla Charter School-Pinellas June 30, 2013. As the Sponsor to the charter school, PCS does not endorse the transfer of the charter to another entity and will move forward with the procedures for closing the school.

We ask that you sign the one page closing agreement, return a scanned version of the signed agreement to me by Friday, June 21, 2013 and mail the original. Please identify the name of the Ben Gamla representative who will work with us during closing procedures and who will be on site while student records and equipment are picked up.

Since you identified June 30, 2013 as the last date that you may have access to the building, we are sensitive to your urgency to complete these procedures by then and will work with you to meet this requirement.

Thank you.

A handwritten signature in cursive script that reads "Dot Clark".

Dot Clark
Coordinator, Partnership Schools
Pinellas County Schools

PCS School Board Members
Dr. Michael A. Grego, Superintendent, Pinellas County Schools
David Koperski, School Board Attorney
Lori Matway, Associate Superintendent for School and Community Services
Eric Lynn, Ben Gamla Charter-Pinellas, Local Chair

Addendum C - Supporting Documentation

AGREEMENT FOR TERMINATION OF CHARTER SCHOOL
BEN GAMLA CHARTER SCHOOL - PINELLAS

This Agreement (hereinafter "Agreement"), is entered into this ____ day of _____, 2013, by and between the School District of Pinellas County, Florida (hereinafter "District"), and National Ben Gamla Charter School Foundation, Inc., d/b/a Ben Gamla Charter School - Pinellas (hereinafter "Ben Gamla").

WITNESSETH:

WHEREAS, Ben Gamla and the School Board of Pinellas County, Florida (hereinafter "School Board") entered into a Charter School Agreement dated May 8, 2012 (hereinafter "Charter"), that provides the terms of the School Board's sponsorship of Ben Gamla's charter school;

WHEREAS, Ben Gamla has sent written notice that it is closing the charter school effective June 30, 2013; and

WHEREAS, the School District agrees to work with Ben Gamla on closing procedures as outlined in the Charter.

NOW, THEREFORE, in consideration of premises and of the mutual promises and covenants herein set forth, the receipt of which are hereby acknowledged by both parties, the parties agree as follows:

1. The recitals above are true and correct and are incorporated herein by reference.
2. The Charter shall terminate at 5:00 p.m. on June 30, 2013, except that the provisions of the contract relating to liability, property return, closing procedures, indemnification and other related provisions shall survive the termination of the contract.
3. Ben Gamla and the District, through their designated contacts, will coordinate the pre-closing and closing procedures to be completed in accordance with the Charter.

IN WITNESS WHEREOF, Ben Gamla and the District have executed or caused this Agreement to be executed by their undersigned officers, duly authorized, as of the day and year first above written.

BOARD OF DIRECTORS OF
NATIONAL BEN GAMLA CHARTER
SCHOOL FOUNDATION, INC., d/b/a
BEN GAMLA CHARTER SCHOOL - PINELLAS

By: *Debra Klein*
Debra Klein,
Board Chair

Its: _____
Attest: _____
By its: _____

THE SCHOOL BOARD OF PINELLAS
COUNTY, FLORIDA

By: _____
Michael A. Grego, Ed.D.
Superintendent

Approved as to Form:

Office of School Board Attorney

Addendum C - Supporting Documentation

THE CITY OF PALM BAY, FLORIDA

PALM BAY COMMUNITY CHARTER SCHOOL – PATRIOT CAMPUS

County: Brevard

Status as of date of application: Closed

Date Charter School Closed: July 19, 2011

Reason(s) for closure:

On June 30, 2011, the School Board of Brevard County, Florida, the Charter School's Sponsor, served the City of Palm Bay, Florida, the Charter School's Governing Board, with 90-day notice of termination for failure to meet generally accepted standards of fiscal management. There were genuine issues of material fact which may have been appealable as of right. However, anticipating a termination, on June 23, 2011, the Governing Body of the Charter School, (the City) voted unanimously to not contest or appeal the School Board's termination of the Charter School Contract. The City and the School Board agreed to close the Charter School and cease School operations as of July 19, 2011.

Documentation Attached:

- School Board of Brevard County, Florida, Meeting of July 19, 2011; Board Agenda Item No. F-33; "Final Order on the School Board's ninety (90) day notice of termination of the Palm Bay Community Charter School – Patriot Campus", agreed termination of charter school.
- Letter dated June 30, 2011 from the School Board of Brevard County, Florida to the City of Palm Bay giving 90-days' notice of termination for failure to meet generally accepted standards of fiscal management
- Fax from the City of Palm Bay to the School Board of Brevard County, Florida and attached Minutes of City of Palm Bay, Florida Council Meeting No. 2011-21 of June 23, 2011, notifying the School Board that the City will not contest or appeal the School Board's termination of the Charter School Contract.

Addendum C - Supporting Documentation

BEFORE THE SCHOOL BOARD OF BREVARD COUNTY, FLORIDA

IN RE: PALM BAY COMMUNITY
CHARTER SCHOOL - PATRIOT CAMPUS

BOARD AGENDA ITEM NO. F-33
July 19, 2011

_____ /

FINAL ORDER

THIS CAUSE came before the SCHOOL BOARD OF BREVARD COUNTY, FLORIDA (SCHOOL BOARD) on the School Board's ninety (90) day notice of termination of the Palm Bay Community Charter School - Patriot Campus charter school contract dated June 30, 2005.

FINDINGS OF FACT

1. The School Board and the City of Palm Bay, Florida, entered into the Palm Bay Community Charter School - Patriot Campus charter school contract on June 30, 2005, pursuant to the authority of Section 1002.33, Fla. Stat., to grant the municipality a charter contract to operate a charter school in the City of Palm Bay.

2. At its June 30, 2011, meeting the School Board took action to provide the City of Palm Bay (City), the governing body of the charter school, a ninety (90) day notice of termination of the charter school contract pursuant to Section 1002.33(8)(b), Fla. Stat., for failure to meet generally accepted standards of fiscal management. A copy of said notice is attached hereto and incorporated herein as Exhibit "A".

3. On July 14, 2011, the City's Attorney delivered a letter to the School Board Attorney containing a certified copy of the minutes of the June 23, 2011, Palm Bay City Council special

Addendum C - Supporting Documentation

meeting, at which the City Council, as governing body of the charter school, voted unanimously to not contest or appeal the School Board's termination of the charter school contract. A copy of the City Attorney's letter and certified minutes of the Palm Bay City Council's June 23, 2011, special meeting are attached hereto as Exhibit "B".

4. It is in the best interest of the students enrolled in the charter school that the charter contract be terminated as of the date of this Final Order to allow parents the opportunity to enroll their children in other public schools before the beginning of the 2011-2012 school year on August 10, 2011.

5. It is also in the best interest of the students attending the receiving schools and the administration of the Brevard County School District to terminate the charter contract as of the date of this Final Order to facilitate the orderly transfer of students into the receiving schools pursuant to Section 1002.33(8)(g), Fla. Stat.

6. Based upon the action of the Palm Bay City Council as governing body of the charter school to not contest or appeal the termination of the charter contract, and in reliance thereon, the School Board finds that the charter contract can and should be terminated effective as of the date of this Final Order.

CONCLUSIONS OF LAW

7. The School Board has jurisdiction of the subject matter and parties of this proceeding. Section 1002.33(8), Fla. Stat.

Addendum C - Supporting Documentation

8. The School Board finds that the charter school contract between the School Board and the City of Palm Bay for the Palm Bay Community Charter School - Patriot Campus, should be and is hereby terminated effective July 19, 2011, for the failure of the charter school to meet generally accepted standards of fiscal management pursuant to Sections 1002.33(8)(a) and (b), Fla. Stat.

DONE AND ORDERED this 19th day of July, 2011, in Viera, Brevard County, Florida.


THE SCHOOL BOARD OF
BREVARD COUNTY, FLORIDA

By:


BARBARA A. MURRAY, Ph.D.
Chairman

Filed with the Clerk in the
Office of the Superintendent
this 19th day of July, 2011.

ATTEST:


BRIAN T. BINGGELI, Ed.D
Superintendent

Addendum C - Supporting Documentation

School Board of Brevard County

2700 Judge Fran Jamieson Way • Viera, FL 32940-6601
Brian T. **Binggeli**, Ed.D., **Superintendent**



VIA U.S. CERTIFIED MAIL AND FAX

June 30, 2011

The Honorable John Mazziotti
Mayor of Palm Bay
City Hall
120 Malabar Road, S.E.
Palm Bay, FL 32907

Ms. Sue Hann
Palm Bay City Manager
City Hall
120 Malabar Road, S.E.
Palm Bay, FL 32907

Dear Mayor Mazziotti and Ms. Hann:

The purpose of this correspondence is to provide official notification that the School Board of Brevard County took action at the June 30, 2011 Special Board meeting to give ninety (90) day notice to terminate the Palm Bay Community Charter – Patriot Campus charter contract. Pursuant to §1002.33(8)(a), Florida Statutes, the charter contract may be terminated for failure to meet generally accepted standards of fiscal management. Palm Bay Community Charter – Patriot Campus has failed to correct identified deficiencies as described in Internal Audit Report dated June 1, 2011 and External Audits for June 30, 2009 and 2010 fiscal years.

As you are aware, RSM McGladrey was contracted by Brevard Public Schools to perform a financial audit at Palm Bay Community Charter – Patriot Campus. Major issues regarding the fiscal management of Palm Bay Community Charter – Patriot Campus are cited in the June 1, 2011 report provided by RSM McGladrey. The internal auditor determines risks based upon auditing standards. Of the thirteen (13) identified concerns, eight (8) are considered "High" risks that require immediate attention and could cause significant operational issues if not addressed.

Exhibit

"A"

Phone: (321) 633-1000, ext. 402 • FAX: (321) 633-3432

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Addendum C - Supporting Documentation

As reported by the external auditor, Berman Hopkins, Patriot has met one of the conditions for "financial emergency" for two (2) consecutive years as described in §218.503(1):

- §218.503(1)(a) – Failure to make bond debt service payments when due, as a result of lack of funds.
- §218.503(1)(e) – A total fund balance deficit and a government-wide ending net deficit.

Patriot reported an accumulated net deficit of \$4,569,700 and a government-wide ending net deficit of \$3,300,100 as of June 30, 2010. The accumulated net deficit increased \$1,119,700 from June 30, 2009 to June 30, 2010. Moreover, the school received a going-concern qualified opinion for the year ended June 30, 2010 and a disclaimer of opinion for the year ended June 30, 2009 from the external auditor.

As reported in Patriot's external audit report dated August 31, 2010, Patriot entered into a capital lease for financing the acquisition of the school facility in 2006, in the amount of \$21,000,000 with payments through July 1, 2036. The lease arrangement was entered into as part of a transaction consisting of a bond issuance by the City of Palm Bay. Prior to December 31, 2008, Patriot made interest payments in the amount of \$589,800. However, Patriot has been unable to continue making capital lease payments due to insufficient funds subsequent to this date. Non-payment of the capital lease of January 1, 2009 resulted in a default of the agreement.

Pursuant to §1002.345, F.S., Palm Bay Community Charter – Patriot Campus provided the Office of School Choice a Financial Corrective Action Plan, dated March 8, 2010, which included a proposed Forbearance and Modification Agreement between the City of Palm Bay, as Issuer of the bonds, Palm Bay Community Charter L.L.C., as Borrower, and the bond Trustee and bond holders. Subsequently, the district provided the Florida Department of Education a synopsis of its concerns as well as a copy of the provided Financial Corrective Action Plan for approval on March 24, 2010. The intention of such forbearance would allow the Borrower and the City to enter into a financial recovery plan in accordance with §218.503, F.S., and provide financial stability for future operation as a charter school in accordance with §1013.62(a)(2), F.S.

As of this date, neither the City of Palm Bay nor Palm Bay Community Charter, L.L.C. has executed the Forbearance and Modification Agreement. Based on the analysis conducted by RSM McGladrey, it can be reasonably projected that Palm Bay Community Charter – Patriot Campus will continue to meet conditions of "financial emergency" as of June 30, 2011. In accordance with an email dated May 23, 2011 from Michael Kooi, Florida Department of Education Executive Director of the Office of Independent Education and Parental Choice, the Financial Corrective Action Plan cannot be approved by the Commissioner of Education without the execution of a Forbearance and Modification Agreement to address the accumulated net deficit.

Addendum C - Supporting Documentation

Please understand that you may within fourteen (14) days of receipt of this notice, request an informal hearing before the Sponsor.

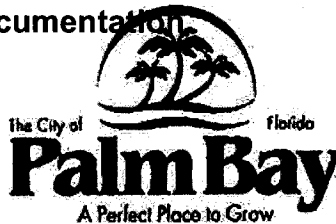
Sincerely,



Brian T. Binggeli, Ed.D.

cc School Board Members
Harold Bistline
Judy Preston
Jo Ann Clark
Vicki Mace
Karen Strickland
RSM McGladrey
Audit Committee Members
Reggie Revis
Andrew Lannon
Florida Department of Education

Addendum C - Supporting Documentation



Office of the City Attorney

VIA FAX

Brevard County School Board
c/o Harold Turner Bistline, Esq.
1037 Pathfinder Way
Suite 150
Rockledge, FL 32955-3268
Fax No. 321.636.1170

Re: **Palm Bay Community Charter – Patriot Campus charter contract.**
Palm Bay Municipal Charter High School charter contract.

Dear Mr. Bistline:

This letter is sent to you for the purpose of notifying you of the following facts. On June 21, 2011, I was verbally informed by you that Notice of Termination letters were forthcoming for both the Palm Bay Community Charter – Patriot Campus charter contract and the Palm Bay Municipal Charter High School charter contract. At Special Council Meeting No. 2011-21 on June 23, 2011, I notified the Mayor and City Council of this fact. The charter schools were the subject of agenda item no. 2 of that Special Council Meeting. During that Special Council Meeting, as you can see from attached Exhibit "1", the Mayor and City Council by a unanimous vote decided not to contest or appeal the School Board of Brevard County's forthcoming Notices of Termination of both the Palm Bay Community Charter – Patriot Campus charter contract and the Palm Bay Municipal Charter High School charter contract. As you can see from attached Exhibit "2", the Mayor, the City Manager and I received both Notice of Termination letters on June 30, 2011. These letters were subsequently forwarded by the City Manager to the Mayor and City Council on June 30, 2011 at 3:02 p.m.

Please call me if you have any questions or concerns.

Thanks,

Andrew P. Lannon, Esq.

Exhibit
" B "

Addendum C - Supporting Documentation

CITY OF PALM BAY, FLORIDA

SPECIAL COUNCIL MEETING NO. 2011-21

Held on Thursday, the 23rd day of June 2011, at the City Hall Council Chambers, 120 Malabar Road, SE, Palm Bay, Florida.

This meeting was properly noticed pursuant to law; the minutes are on file in the Office of the City Clerk, City Hall, Palm Bay, Florida.

The meeting was called to order at the hour of 6:30 P.M.

ROLL CALL:

MAYOR:	John J. Mazziotti	Present
DEPUTY MAYOR:	William Capole	Present
COUNCILMEMBER:	Kristine Isnardi	Present
COUNCILMEMBER:	Michele Paccione	Present
COUNCILMEMBER:	Ken Greene	Present
CITY MANAGER:	Sue Hann	Present
CITY ATTORNEY:	Andrew Lannon	Present
DEPUTY CITY CLERK:	Terese Jones	Present

CITY STAFF: Present were Chad Shoultz, Deputy City Manager; and Brad Johnson, Budget Administrator.

BUSINESS:

1. *Attorney-client session scheduled to discuss the pending litigation of City of Palm Bay versus Wells Fargo Bank NA to provide the City Attorney advice concerning settlement negotiations or strategy related to litigation expenses.*

The Mayor announced the names of the individuals who would be in attendance at the meeting. He stated the meeting would last approximately one-half hour.

The City Council moved to the City Manager's Conference Room to hold the attorney-client session and returned to the Council Chambers at the conclusion of same.

2. *Consideration of action items regarding the Palm Bay Community Charter Schools.*

Mrs. Hann stated the charter school had been unable to make its debt service payment since January 1, 2009, as indicated in the Brevard County School Board internal audit report dated June 1, 2011. This placed the school in a continued state of financial emergency as defined in Florida Statutes, Section 218.503. The projected state funding was anticipated to decline from \$6,468 per student to \$6,045 per student. The enrollment had decreased from 736 in the past school year to 713 in Fiscal Year 2011-2012.



Addendum C - Supporting Documentation

City of Palm Bay, Florida
Special Council Meeting No. 2011-21
Minutes - June 23, 2011
Page 2 of 2

Mr. Lannon stated the City had been advised by the School District that a Notice of Termination letter was forthcoming for the charter school. He asked for guidance as to whether the City would contest or appeal the termination.

Mrs. Hann stated that special counsel would be required for several different aspects of the appeal which would be very costly. Ultimately the City would become much more involved in the operation of the school; the City did not have the capacity to do so based on the budget constraints.

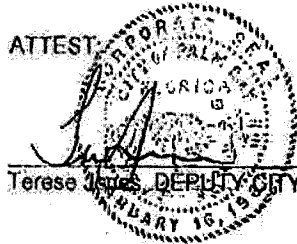
Motion by Mayor Mazziotti, seconded by Deputy Mayor Capote, not to contest or appeal the Notice of Termination. Motion carried with members voting as follows: Mayor Mazziotti, Yea; Deputy Mayor Capote, Yea; Councilwoman Isnardi, Yea; Councilwoman Paccione, Yea; Councilman Greene, Yea.

ADJOURNMENT:

There being no further business, the meeting adjourned at the hour of 7:14 P.M.


John J. Mazziotti, MAYOR

ATTEST




Terese Jones, DEPUTY CITY CLERK

Addendum C - Supporting Documentation

THE CITY OF PALM BAY, FLORIDA

PALM BAY MUNICIPAL CHARTER HIGH SCHOOL

County: Brevard

Status as of date of application: Closed

Date Charter School Closed: July 19, 2011

Reason(s) for closure:

On June 30, 2011, the School Board of Brevard County, Florida, the Charter School's Sponsor, served the City of Palm Bay, Florida, the Charter School's Governing Board, with 90-day notice of termination for failure to meet generally accepted standards of fiscal management. There were genuine issues of material fact which may have been appealable as of right. However, anticipating a termination, on June 23, 2011, the Governing Body of the Charter School, (the City) voted unanimously to not contest or appeal the School Board's termination of the Charter School Contract. The City and the School Board agreed to close the Charter School and cease School operations as of July 19, 2011.

Documentation Attached:

- School Board of Brevard County, Florida, Meeting of July 19, 2011; Board Agenda Item No. F-32; "Final Order on the School Board's ninety (90) day notice of termination of the Palm Bay Municipal Charter High School", agreed termination of charter school.
- Letter dated June 30, 2011 from the School Board of Brevard County, Florida to the City of Palm Bay giving 90-days' notice of termination for failure to meet generally accepted standards of fiscal management
- Fax from the City of Palm Bay to the School Board of Brevard County, Florida and attached Minutes of City of Palm Bay, Florida Council Meeting No. 2011-21 of June 23, 2011, notifying the School Board that the City will not contest or appeal the School Board's termination of the Charter School Contract.

Addendum C - Supporting Documentation

BEFORE THE SCHOOL BOARD OF BREVARD COUNTY, FLORIDA

IN RE: PALM BAY MUNICIPAL
CHARTER HIGH SCHOOL

BOARD AGENDA ITEM NO. F-32
July 19, 2011

FINAL ORDER

THIS CAUSE came before the SCHOOL BOARD OF BREVARD COUNTY, FLORIDA (SCHOOL BOARD) on the School Board's ninety (90) day notice of termination of the Palm Bay Municipal Charter High School charter school contract dated May 12, 2009.

FINDINGS OF FACT

1. The School Board and the City of Palm Bay, Florida, entered into the Palm Bay Municipal Charter High School charter school contract on May 12, 2009, pursuant to the authority of Section 1002.33, Fla. Stat., to grant the municipality a charter contract to operate a charter school in the City of Palm Bay.

2. At its June 30, 2011, meeting the School Board took action to provide the City of Palm Bay (City), the governing body of the charter school, a ninety (90) day notice of termination of the charter school contract pursuant to Section 1002.33(8)(b), Fla. Stat., for failure to meet generally accepted standards of fiscal management. A copy of said notice is attached hereto and incorporated herein as Exhibit "A".

3. On July 14, 2011, the City's Attorney delivered a letter to the School Board Attorney containing a certified copy of the minutes of the June 23, 2011, Palm Bay City Council special

Addendum C - Supporting Documentation

meeting, at which the City Council, as governing body of the charter school, voted unanimously to not contest or appeal the School Board's termination of the charter school contract. A copy of the City Attorney's letter and certified minutes of the Palm Bay City Council's June 23, 2011, special meeting are attached hereto as Exhibit "B".

4. It is in the best interest of the students enrolled in the charter school that the charter contract be terminated as of the date of this Final Order to allow parents the opportunity to enroll their children in other public schools before the beginning of the 2011-2012 school year on August 10, 2011.

5. It is also in the best interest of the students attending the receiving schools and the administration of the Brevard County School District to terminate the charter contract as of the date of this Final Order to facilitate the orderly transfer of students into the receiving schools pursuant to Section 1002.33(8)(g), Fla. Stat.

6. Based upon the action of the Palm Bay City Council as governing body of the charter school to not contest or appeal the termination of the charter contract, and in reliance thereon, the School Board finds that the charter contract can and should be terminated effective as of the date of this Final Order.

CONCLUSIONS OF LAW

7. The School Board has jurisdiction of the subject matter and parties of this proceeding. Section 1002.33(8), Fla. Stat.

Addendum C - Supporting Documentation

8. The School Board finds that the charter school contract between the School Board and the City of Palm Bay for the Palm Bay Municipal High School should be and is hereby terminated effective July 19, 2011, for the failure of the charter school to meet generally accepted standards of fiscal management pursuant to Sections 1002.33(8)(a) and (b), Fla. Stat.

DONE AND ORDERED this 19th day of July, 2011, in Viera, Brevard County, Florida.


THE SCHOOL BOARD OF
BREVARD COUNTY, FLORIDA

By:


BARBARA A. MURRAY, Ph.D.
Chairman

Filed with the Clerk in the
Office of the Superintendent
this 19th day of July, 2011.

ATTEST:


BRIAN T. BINGGELI, Ed.D
Superintendent

Addendum C - Supporting Documentation

School Board of Brevard County
2700 Judge Fran Jamieson Way • Viera, FL 32940-6601
Brian T. Binggeli, Ed.D., Superintendent



VIA U.S. CERTIFIED MAIL AND FAX

June 30, 2011

The Honorable John Mazziotti
Mayor of Palm Bay
City Hall
120 Malabar Road, S.E.
Palm Bay, FL 32907

Ms. Sue Hann
Palm Bay City Manager
City Hall
120 Malabar Road, S.E.
Palm Bay, FL 32907

Dear Mayor Mazziotti and Ms. Hann:

The purpose of this correspondence is to provide official notification that the School Board of Brevard County took action at the June 30, 2011 Special Board meeting to give ninety (90) day notice to terminate the Palm Bay Municipal Charter High School charter contract. Pursuant to §1002.33(8)(a), Florida Statutes, the charter contract may be terminated for failure to meet generally accepted standards of fiscal management.

As you are aware, RSM McGladrey was contracted by Brevard Public Schools to perform a financial audit at Palm Bay Municipal Charter High School. Major issues regarding the fiscal management of Palm Bay Municipal Charter High School are cited in the June 1, 2011 report provided by RSM McGladrey. The internal auditor determines risks based upon auditing standards. Of the seven (7) identified concerns, three (3) are considered "High" risks that require immediate attention and could cause significant operational issues if not addressed.

RSM McGladrey reviewed the School's draft amended 2010/2011 annual budget, which was submitted to the internal auditor on May 25, 2011. (The amended budget was approved by the Palm Bay City Council on June 2, 2011.) The draft amended budget reflected revenue and expense amounts per the March 31, 2011 financial statements, expected future revenues and expenditures, which were not reflected in the original budget, and revised classification of certain expenses.

Exhibit

Phone: (321) "A" 21) 633-3432

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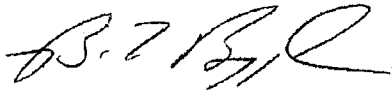
Addendum C - Supporting Documentation

Palm Bay Municipal Charter High School has projected an \$11,900 excess of revenues over expenditures. The School has incurred \$89,800 of operation of plant expenditures as compared to a budget of \$7,000. As such, Palm Bay Municipal Charter High School is trending a potential \$70,900 deficiency of revenues under expenditures for the 2010/2011 fiscal year. The amended budget takes into account an action taken by the Palm Bay City Council on June 2, 2011, which modified the amount paid by the School for the use of the school facility.

The School Board of Brevard County is taking action to give ninety (90) day notice to terminate the Palm Bay Community Charter – Patriot Campus charter contract. Palm Bay Municipal Charter High School shares the same facility, administration, and other resources with the City's K-8 charter school, Palm Bay Community Charter – Patriot Campus, which meets criteria for a state of "financial emergency". It stands to reason that the high school will not be able to sustain operation under these circumstances, particularly since the School is not projected to end the current fiscal year with a positive fund balance.

Please understand that you may within fourteen (14) days of receipt of this notice, request an informal hearing before the Sponsor.

Sincerely,



Brian T. Binggeli, Ed.D.

cc School Board Members
Harold Bistline
Judy Preston
Jo Ann Clark
Vicki Mace
Karen Strickland
RSM McGladrey
Audit Committee Members
Reggie Revis
Andrew Lannon
Florida Department of Education

Addendum C - Supporting Documentation**Office of the City Attorney****VIA FAX**

Brevard County School Board
c/o Harold Turner Bistline, Esq.
1037 Pathfinder Way
Suite 150
Rockledge, FL 32955-3268
Fax No. 321.636.1170

**Re: Palm Bay Community Charter – Patriot Campus charter contract.
Palm Bay Municipal Charter High School charter contract.**

Dear Mr. Bistline:

This letter is sent to you for the purpose of notifying you of the following facts. On June 21, 2011, I was verbally informed by you that Notice of Termination letters were forthcoming for both the Palm Bay Community Charter – Patriot Campus charter contract and the Palm Bay Municipal Charter High School charter contract. At Special Council Meeting No. 2011-21 on June 23, 2011, I notified the Mayor and City Council of this fact. The charter schools were the subject of agenda item no. 2 of that Special Council Meeting. During that Special Council Meeting, as you can see from attached Exhibit "1", the Mayor and City Council by a unanimous vote decided not to contest or appeal the School Board of Brevard County's forthcoming Notices of Termination of both the Palm Bay Community Charter – Patriot Campus charter contract and the Palm Bay Municipal Charter High School charter contract. As you can see from attached Exhibit "2", the Mayor, the City Manager and I received both Notice of Termination letters on June 30, 2011. These letters were subsequently forwarded by the City Manager to the Mayor and City Council on June 30, 2011 at 3:02 p.m.

Please call me if you have any questions or concerns.

Thanks,

Andrew P. Lannon, Esq.

Exhibit

"B"

Addendum C - Supporting Documentation

CITY OF PALM BAY, FLORIDA

SPECIAL COUNCIL MEETING NO. 2011-21

Held on Thursday, the 23rd day of June 2011, at the City Hall Council Chambers, 120 Malabar Road, SE, Palm Bay, Florida.

This meeting was properly noticed pursuant to law; the minutes are on file in the Office of the City Clerk, City Hall, Palm Bay, Florida.

The meeting was called to order at the hour of 6:30 P.M.

ROLL CALL:

MAYOR:	John J. Mazziotti	Present
DEPUTY MAYOR:	William Capote	Present
COUNCILMEMBER:	Kristine Isnardi	Present
COUNCILMEMBER:	Michele Paccione	Present
COUNCILMEMBER:	Ken Greene	Present
CITY MANAGER:	Sue Hann	Present
CITY ATTORNEY:	Andrew Lannon	Present
DEPUTY CITY CLERK:	Terese Jones	Present

CITY STAFF: Present were Chad Shoultz, Deputy City Manager; and Brad Johnson, Budget Administrator.

BUSINESS:

1. **Attorney-client session scheduled to discuss the pending litigation of City of Palm Bay versus Wells Fargo Bank NA to provide the City Attorney advice concerning settlement negotiations or strategy related to litigation expenses.**

The Mayor announced the names of the individuals who would be in attendance at the meeting. He stated the meeting would last approximately one-half hour.

The City Council moved to the City Manager's Conference Room to hold the attorney-client session and returned to the Council Chambers at the conclusion of same.

2. **Consideration of action items regarding the Palm Bay Community Charter Schools.**

Mrs. Hann stated the charter school had been unable to make its debt service payment since January 1, 2009, as indicated in the Brevard County School Board internal audit report dated June 1, 2011. This placed the school in a continued state of financial emergency as defined in Florida Statutes, Section 218.503. The projected state funding was anticipated to decline from \$6,468 per student to \$6,045 per student. The enrollment had decreased from 736 in the past school year to 713 in Fiscal Year 2011-2012.



ADDENDUM C - Supporting Documentation

City of Palm Bay, Florida
Special Council Meeting No. 2011-21
Minutes - June 23, 2011
Page 2 of 2

Mr. Lannon stated the City had been advised by the School District that a Notice of Termination letter was forthcoming for the charter school. He asked for guidance as to whether the City would contest or appeal the termination.

Mrs. Hann stated that special counsel would be required for several different aspects of the appeal which would be very costly. Ultimately the City would become much more involved in the operation of the school; the City did not have the capacity to do so based on the budget constraints.

Motion by Mayor Mazziotti, seconded by Deputy Mayor Capote, not to contest or appeal the Notice of Termination. Motion carried with members voting as follows: Mayor Mazziotti, Yea; Deputy Mayor Capote, Yea; Councilwoman Isnardi, Yea; Councilwoman Paccione, Yea; Councilman Greene, Yea.

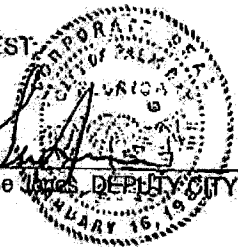
ADJOURNMENT:

There being no further business, the meeting adjourned at the hour of 7:14 P.M.

John J. Mazziotti
John J. Mazziotti, MAYOR

ATTEST:

Teresse Jones
Teresse Jones, DEPUTY CITY CLERK



Addendum C - Supporting Documentation

PINECREST ACADEMY, INC.

PINECREST ACADEMY HIGH SCHOOL (ORLANDO CAMPUS)

Status as of date of application: Closed

Date Charter School Closed: Effective upon approval for 2012-13 school year
November 2, 2012 (Approved by Pinecrest Academy, Inc. Governing Board)
December 11, 2012 (Approved by Orange County School Board)

Reason(s) for closure: Voluntary Closure by the Governing Board of the Charter School

Documentation Attached:

- Pinecrest Academy, Inc. Resolution approving the Governing Board's intent to dissolve or voluntarily close Pinecrest Academy High School (Orlando Campus) effective November 2, 2012
- Orange County School Board Meeting of December 11, 2012, Item 7.02 "Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School (Orlando Campus)"
 - Action Type: Consent.
 - Recommended Action: Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School.
 - Final Resolution: Motion Carries.

Addendum C - Supporting Documentation

PINECREST ACADEMY, INC

BOARD RESOLUTION


The undersigned hereby certifies that he/she is an Officer and/or Director of **PINECREST ACADEMY, INC.**, a not-for-profit corporation organized and existing under the laws of the State of Florida, and that the following is a true and correct copy of a resolution adopted by the Board of Directors of said corporation at a meeting held on November 2, 2012:

RESOLVED by the Board of Directors of Pinecrest Academy, Inc. to approve to notify the school district of Pinecrest Academy, Inc.'s intent to dissolve or voluntarily close the Pinecrest Academy High School (Orlando Campus) effective immediately.

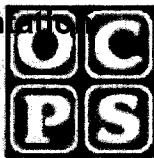
That the Adoption of said resolutions was in all respects legal and that said resolutions are in full force and effect and have not been modified or rescinded.

DATED November 2, 2012

PINECREST ACADEMY, INC.
A Florida not-for-profit corporation

By: 
Judith Marty, Board Chair

Addendum C - Supporting Documents



ORANGE COUNTY PUBLIC SCHOOLS
445 West Amelia Street, Orlando, FL 32801
407-317-3200
OCPS Means Success!

Agenda Item Details

Meeting Dec 11, 2012 - Public Hearing and School Board Meeting 5:30 pm
 Category 7. Consent - Approve Education Services Related Items
 Subject 7.02 Request Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School
 Type Action (Consent)
 Recommended Action Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School

BACKGROUND:

The application for Pinecrest Preparatory Charter High School (9-12) was accepted and unanimously approved by the Orange County School Board (OCSB) on September 23, 2008. Pinecrest Preparatory Charter High School exercised a contractual one-year deferral option for the 2009-2010 school year. In 2010-2011, Pinecrest Preparatory Charter High School began its operations. On September of 2012, the OCPS School Choice Office was informed and received documentation that Pinecrest Preparatory Charter High School had a student enrollment of only five (5) students. On October 30, 2012, Pinecrest Preparatory Charter High School and its Board of Directors informed OCPS of the student enrollment declining to zero (0) and a pending decision to voluntarily close the school. Pinecrest Preparatory Charter High School was then served with communication that failure to voluntarily close would lead to 90 day closure proceedings. Subsequently, Pinecrest Preparatory Charter High School and its Board of Directors voted on November 2, 2012 to voluntarily cease all operations as a charter school. This closure will be effective immediately for the 2012-13 school year and all subsequent school years. The Pinecrest Preparatory Charter High School Board of Directors cited the following reasons for the voluntary closure: an inability to secure an appropriate facility for operation and an unstable financial outlook based on student enrollment.

This charter school voluntary closure directly supports School Board Strategic Goal #1—Intense Focus on Student Achievement and Goal #4 – Efficient Operations.

FISCAL IMPACT STATEMENT:

None

RECOMMENDED RESOLUTION:

Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School

SUBMITTED AND PREPARED BY:

Jesus Jara, Deputy Superintendent
 Christopher Bernier, Senior Executive Director, School Choice Services

Our adopted rules of Parliamentary Procedure, Robert's Rules, provide for an agenda listing several items for approval of the Board by a single motion. Items listed on the agenda have gone through Cabinet review and recommendation. Documentation concerning these items has been provided to all Board members and the public in advance to assure an extensive and thorough review. Items may be removed from the agenda at the request

of any board agenda **Attachment C - Supporting Documentation**

Motion & Voting

to Approve the Consent Agenda

Motion by Christine Moore, second by Pam Gould.

Final Resolution: Motion Carries

Yea: William Sublette, Christine Moore, Jole W Cadle, Daryl Flynn, Kat B Gordon, Pam Gould, Judge Rick Roach, Nancy Robinson

OCPS EEO Non-Discrimination Statement

The School Board of Orange County, Florida, does not discriminate in admission or access to, or treatment or employment in its programs and activities, on the basis of race, color, religion, age, sex, national origin, marital status, disability, genetic information, sexual orientation, gender identity or expression, or any other reason prohibited by law. The following individuals at the Ronald Blocker Educational Leadership Center, 445 W. Amelia Street, Orlando, Florida 32801, attend to compliance matters: ADA Coordinator & Equal Employment Opportunity (EEO) Supervisor: Carianne Reggio; Section 504 Coordinator: Latonia Green; Acting Title IX Coordinator: Jennifer Gramzinski (407.317.3200)

**ARTICLES OF INCORPORATION OF THE SOMERSET
NEIGHBORHOOD SCHOOL, INC.**

THE UNDERSIGNED, as incorporator and on behalf of a non-for-profit, non-stock corporation under the laws of the State of Florida, hereby adopts the following Articles of Incorporation:

ARTICLE I

NAME

Section 1.1. The name of the Corporation is The Somerset Neighborhood School, Inc.

ARTICLE II

DURATION

Section 2.1. The Corporation shall have perpetual existence unless dissolved pursuant to law.

ARTICLE III

NON-STOCK CORPORATION

Section 3.1. The Corporation shall be organized on a non-stock basis under the Florida Not-for-Profit Corporation Act and may issue no Certificates of Membership.

ARTICLE IV

PURPOSE

Section 4.1. The purposes for which the Corporation is organized is for transacting any and all lawful business for which corporations may be incorporated under the Florida Not-for-Profit Corporation Act and to distribute the whole or any part of the income therefrom and the principal thereof exclusively for charitable, religious, scientific, literary, or educational purposes, either

directly or by contributions to organizations that qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code and Regulations issued pursuant thereto, as they now exist or as they may hereafter be amended.

Section 4.2 The Corporation shall have the power, either directly or indirectly, either alone or in conjunction or cooperation with others, to do any and all lawful acts and things and to engage in any and all lawful activities which may be necessary, useful, suitable, desirable, or proper for the furtherance, accomplishment, fostering, or attainment of any or all of the purposes for which a Corporation is organized, and to aid or assist other organizations whose activities are such as to further accomplish, foster, or attain any of such purposes. Notwithstanding anything herein to the contrary, the Corporation shall exercise only such powers as are in furtherance of the exempt purposes of organizations set forth in Section 501(c)(3) of the Internal Revenue Code of 1986 and the regulations thereunder as the same now exist or as they may be hereinafter amended from time to time.

Section 4.3. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, any Director or Officer of the Corporation or any other private individual (except that reasonable compensation may be paid for services rendered to or for the Corporation affecting one or more of its purposes); and no Director or Officer of the Corporation, or any private individual, shall be entitled to share in the distribution of any of the corporate assets on dissolution of the Corporation.

Section 4.4. No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate or intervene in (including the publication or distribution of statements) any political campaign on behalf of any candidate for public office.

Section 4.5. The Corporation shall distribute its income for each taxable year at such time and in such manner as not to become subject to tax on undistributed income imposed by Section 4942 of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.6. The Corporation shall not engage in any act of self-dealing as defined in Section 4941(d) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.7. The Corporation shall not retain any excess business holdings as defined in Section 4943(c) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.8. The Corporation shall not make any investments in such manner as to subject it to tax under Section 4944 of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.9. The Corporation shall not make any taxable expenditure as defined in Section 4945(d) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.10. Notwithstanding any other provisions of these Articles of Incorporation, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code and Regulations issued pursuant thereto as they now exist or as they may hereafter be amended, or by an organization contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code and said Regulations as they now exist or as they may hereafter be amended.

Section 4.11 Upon the dissolution of the Corporation, the Board of Directors shall, after paying, or making provision for the payment of, all of the liabilities of the Corporation, dispose of all of the assets of the Corporation, exclusively for the purposes of the Corporation in such manner, or to such organization or organizations organized and operated exclusively for charitable, educational, religious or scientific purposes, as shall at the time qualify as an exempt organization or organizations under Section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provisions of any future United States Revenue Law), as the Board of Directors shall determine. Any of such assets not so disposed of shall be disposed of by the court having proper jurisdiction in the county where the principal office of the Corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, which are organized and operated exclusively for such purposes.

ARTICLE V

MEMBERS

Section 5.1. This Corporation shall have a membership consisting of the Board of Directors of the Corporation serving from time to time.

ARTICLE VI

DIRECTORS

Section 6.1. The affairs of the Corporation shall be governed by a Board of Directors (hereinafter referred to as the "Board"), subject to the restriction that, except as specifically set forth to the contrary in the Bylaws, the exercise of any powers or actions of the Board shall require the approval thereof by a majority vote of the Board present at a meeting at which a quorum of no less than two (2) Directors are present. The affirmative vote of any two (2) Directors shall be necessary for all corporate action requiring a vote of the Board, including, but not limited to the following:

6.1.1. Approval of charitable gifts, transfers, distributions and grants by the Corporation to other entities.

6.1.2. Adoption of an amendment to the Articles of Incorporation or the Bylaws.

6.1.3. Organization of a subsidiary or affiliate by the Corporation

6.1.4. Approval of any merger, consolidation or sale or other transfer of all or a substantial part of the Corporation.

Section 6.2. The initial Board of Directors shall consist of the following members elected in accordance with this Section 6.2 and the Bylaws:

Section 6.3. The term of office of an elected Director shall be one (1) year and shall expire, regardless of whether or not a successor shall have been duly elected and qualified. The terms of elected Directors shall be staggered so that no elected Director's term expires less than four (4) months before the expiration of the next elected Director.

ARTICLE VII

ADDRESS

Section 7.1. The street address of the principal office of this corporation in the State of Florida is:
6262 Blvd Road, Suite 31
Miami, FL 33155

The Board may, from time to time, move its principal office in the State of Florida to another place in this state.

**ARTICLE VIII
REGISTERED AGENT AND REGISTERED OFFICE**

Section 8.1. The registered agent and registered office of the Corporation shall be:

Name	Address
IGNACIO ZULUETA	6262 BIRD ROAD, SUITE 3 I MIAMI, FL 33155

**ARTICLE IX
AMENDMENT**

Section 9.1. These Articles of Incorporation may be amended in the manner and with the vote provided by law.

**ARTICLE X
BYLAWS**

Section 10.1. The Board of Directors of this Corporation shall adopt Bylaws for the government of this Corporation which shall be subordinate only to the Articles of Incorporation and the laws of the United States and the State of Florida. The Bylaws may be amended from time to time by the Board of Directors.

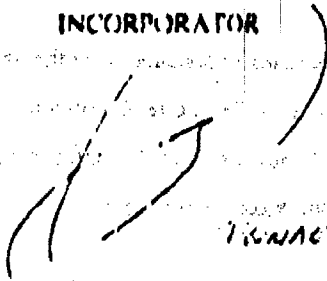
**ARTICLE XI
INCORPORATOR**

Section 11.1. The name and address of the incorporator of this Corporation are as follows:

Name	Address
IGNACIO ZULUETA	6262 WIND ROAD, SUITE 111 MIAMI, FL. 33151

IN WITNESS WHEREOF, the undersigned incorporator has executed these Articles of Incorporation this 2 day of MAY 1997.

INCORPORATOR


Ignacio Zulueta

**CERTIFICATE DESIGNATING PLACE OF BUSINESS OR
DOMICILE FOR THE SERVICE OF PROCESS WITHIN THIS STATE,
NAMING AGENT UPON WHOM PROCESS MAY BE SERVED**

In pursuance of Section 48091 and Section 6010301(3), Florida Statutes, the following is
submitted in compliance with said Sections:

The Somerset Neighborhood School, Inc. desiring to organize under the laws of the State of
Florida with its principal office as indicated in the Certificate of Incorporation, at the City of Fort
Lauderdale, County of Broward, State of Florida, has named IGNACIO ZULUETA
located at 6262 BIRD ROAD, SUITE 311
MIAMI, FLA. 33155

as its agent to accept service of process within this State.

ACKNOWLEDGMENT

Having been named to accept service of process for the above-named corporation, at the place
designated in this Certificate, I hereby accept to act in this capacity, and agree to comply with the
provisions of said Sections relative to keeping open said office.

REGISTERED AGENT



IGNACIO ZULUETA

ARTICLES OF AMENDMENT
to
ARTICLES OF INCORPORATION
Somerset Neighborhood School, Inc.

Pursuant to the provisions of section 617.1006, Florida Statutes, the undersigned Florida nonprofit corporation adopts the following articles of amendment to its articles of incorporation.

FIRST: Amendment(s) adopted: (INDICATE ARTICLE NUMBER(S) BEING AMENDED, ADDED OR DELETED.)

AMENDMENT TO ARTICLE I

The name of the Corporation shall now be:

SOMERSET ACADEMY, INC.

SECOND: The date of adoption of the amendment(s) was: JANUARY 14, 2000

THIRD: Adoption of Amendment (CHECK ONE)

The amendment(s) was (were) adopted by the members and the number of votes cast for the amendment were sufficient for approval.

There are no members or members entitled to vote on the amendment. The amendment(s) was (were) adopted by the board of directors.

Somerset Academy, Inc.

Corporation Name

Magdalena Fresen

Signature of Chairman, Vice Chairman, President, or other Officer

Magdalena Fresen

Typed or Printed Name

Secretary

2/18/00

Title & Date

FILED
STATE
OF FLORIDA
TALLAHASSEE

00 MAR -2 AM 9:48

FILED

State of Florida



Department of State

I certify the attached is a true and correct copy of the Articles of Amendment, filed on March 2, 2000, to Articles of Incorporation for THE SOMERSET NEIGHBORHOOD SCHOOL, INC. which changed its name to SOMERSET ACADEMY, INC., a Florida corporation, as shown by the records of this office.

The document number of this corporation is N97000002553.

Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capitol, this the
Thirteenth day of March, 2000



CR25022 1 22

Katherine Harris

Katherine Harris
Secretary of State

State of Florida



Department of State

I certify the attached is a true and correct copy of the Articles of Incorporation of THE SOMERSET NEIGHBORHOOD SCHOOL, INC., a corporation organized under the laws of the State of Florida, filed on May 5, 1997, as shown by the records of this office.

The document number of this corporation is N97000002553.

Given under my hand and the
Great Seal of the State of Florida,
at Tallahassee, the Capitol, this the
Twenty-second day of July, 1997.



CR2E022 (2-95)

Sandra B. Northam

Sandra B. Northam
Secretary of State



STATE OF TEXAS

County of ... State of Texas

...

Witness my hand and seal this ... day of ... 19...

[Handwritten Signature]



**BYLAWS OF
SOMERSET ACADEMY, INC.
A Florida Nonprofit Corporation**

**ARTICLE 1
OFFICES**

The corporation's principal office shall be fixed and located at such place within the boundaries of the County of Miami-Dade or Broward, Florida, as the Board of Directors ("Board") shall determine. The Board is granted full power and authority to change the principal office from one location to another.

**ARTICLE 2
PURPOSE**

The specific and general purposes of the corporation are described in the Articles of Incorporation.

**ARTICLE 3
NO MEMBERS**

Section 3.1 No Members

The corporation shall have no members. Any action, which would otherwise; by law require approval by a majority of all members or approval by the members shall require only approval of the Board. All rights, which would otherwise by law vest in the members, shall vest in the board.

**ARTICLE 4
DIRECTORS**

Section 4.1 General Powers

Subject to the limitations of the Florida not-for-profit corporation law, the corporation's Articles of Incorporation and these Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board may engage the services of a management company with respect to certain operations of the corporation, provided that the activities and affairs of the corporation shall be managed and all corporate powers shall be exercised under the ultimate direction of the Board. No assignment, referral or delegation of authority by the Board or anyone acting under such delegation shall preclude the Board from exercising full authority over the conduct of the corporation's activities, and the Board may, subject to contractual obligations as may exist, rescind any such assignment, referral or delegation at any time.

Section 4.2 Specific Powers

Without prejudice to its general powers, but subject to the same limitations set forth above, the Board shall have the following powers in addition to any other powers enumerated in these Bylaws and permitted by law:

- a. To select and remove all of the officers, agents and employees of the corporation; to prescribe powers and duties for them which are not inconsistent with law, the corporation's Articles of Incorporation or these Bylaws; and to fix their compensation;
- b. To conduct, manage and control the affairs and activities of the corporation and to make such rules and regulations therefore which are not inconsistent with the law, the corporation's Articles of Incorporation or these Bylaws, as it deems best;
- c. To adopt, make and use a corporate seal and to alter the form of the seal from time to time, as it deems best;
- d. To borrow money and incur indebtedness for the purpose of the corporation, and to cause to be executed and delivered therefore, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecation's and other evidences of debt and securities therefore;
- e. To act as trustee under any trust incidental to the principal object of the corporation, and receive, hold, administer, exchange and expend funds and property subject to such trust;
- f. To acquire by purchase, exchange, lease, gift, devise, bequest, or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property;
- g. To assume any obligations, enter into any contracts or other instruments, and do any and all other things incidental or expedient to the attainment of any corporate purpose;
- h. To form and be a member or shareholder of a not-for-profit entity organized under the law of any state, or to form without members or shareholders a not-for-profit entity organized under the law of any state, for the purposes of education, education or other research, or support of education or education research; and
- i. To carry out such other duties as are described in the Charter or Articles or Incorporation.

Section 4.3 Number, Election and Term of Directors and Related Matters

- a. The authorized number of Directors shall be no less than three (3) and no greater than eleven (11) until changed by amendment of these Bylaws.
- b. Those Directors who are to be elected by the Board of Directors (which shall be the difference between the total number of Directors to comprise the Board of Directors and the number of Directors elected by the Development Committee as provided below) shall be so elected at the annual meeting of the Board of

Directors then in the office. Except as set forth below, only existing members of the Board of Directors may nominate candidates for new Directors. Notice of the Board's intention to elect a Director shall be included in the agenda for that meeting of the Board and shall be publicly announced.

- c. The members of the Development Committee (described below), at each annual meeting of the Board of Directors, shall annually elect by aggregate majority vote up to three Directors of the corporation chosen from the persons so nominated by each Local Board (described below); provided however that the number of such Directors shall not exceed the number of such Local Boards as of the date of the annual meeting. Each such member of the Board of Directors elected by the Development shall have the same tenure and other rights and responsibilities as the balance of the members of the Board of Directors;
- d. Each member of the Board of Directors shall have a term of five years, and may only be re-elected for up to three (3) consecutive terms. Upon serving the maximum term, a Director's term shall automatically expire without further action of the Board. Each such Director who has successfully completed their term as Director, shall be invited to participate in a group of Emeritus Directors. Emeritus Directors are invited to attend Board meetings and other Somerset Academy Inc. functions, provide advice and counsel to the Board, but shall have no voting power.
- e. Directors shall be elected at a duly held meeting of the Board of Directors;
- f. The Board shall include at least one member who is the parent of a child enrolled in a school operated by the corporation and at least one member who is or has been a professional educator and/or school administrator, having experience in education. The Board should endeavor to be comprised of a diverse group of accomplished professional, academic, business, and/or civic minded individuals who are committed to the mission of the corporation.
- g. Persons who are employed by, or are principals of, either a sponsor or a management company for the corporation are not eligible and shall not be elected to serve on the Board so as to avoid potential conflicts of interest. The Board will seek to avoid filling future vacancies on the Board with persons who are employed by schools which are managed by the same company that manages schools operated by the corporation. However, if the corporation does not have a professional educator or administrator on its Board and if the application process described in Section 4.5 does not produce such an applicant for the Board, then the Board may consider and select as a Director an educator or administrator employed by the same company that manages schools operated by the corporation.

Section 4.4 Resignation and Removal

Any Director may resign effective upon giving written notice to the Board, unless the notice specifies a later effective time. If the resignation is effective at a future time, a successor may be selected (by the existing president) before such time, to take office when the resignation becomes effective. A Director may be removed without cause by a majority of the Directors then in office.

Section 4.5 Vacancies

- a. A Board vacancy or vacancies shall be deemed to exist if any Director dies, resigns, or is removed, or if the authorized number of Directors is increased.
- b. The Board shall declare vacant the office of any Director who has been convicted of a felony, or whose fingerprint check results reveal non-compliance with standards of good moral character.
- c. In order to elect a new Director, the Board shall announce the vacancy to the public, including Somerset Academy Inc. parents, teachers, and schools, and invite applications from qualified persons all as described by the Board. The Chairman or another Board member approved by the Board, shall conduct an initial review and evaluation of all applications and report to the Board by way of nomination of candidates. Board members are encouraged to solicit applications from qualified persons. Following review and discussion of the nominated candidates, the Board will proceed to elect the nominated candidates as new Director(s).
- d. New Directors shall be elected by a vote of the majority of the existing Directors. Each Director so elected shall hold office until a successor has been appointed and qualified.
- e. No reduction of the authorized number of Directors shall have the effect of removing any Director prior to the expiration of the Director's term of office.
- f. The Board shall develop an orientation and training program for new Directors and an annual continuing education program for existing Directors.

Section 4.6 Attendance

Directors must be willing and able to travel to fulfill their obligations to Somerset Academy Inc. The Board may declare vacant, the office of any Director if, in any given calendar year:

(a) He/She is absent from three consecutive meetings; or

(b) He/She is absent from four of the board's meetings;

(c) if he/she fails to attend any Authorizer-required conference(s)/meeting(s) at which attendance is mandatory; provided that regardless of their compliance with subsection (a) and (b) above, members must attend at least 50 percent of all the board meetings held during a year.

Section 4.7 Place/Notice of Meetings/Compliance with Applicable Laws

Meetings of the Board may be held at the principal office of the corporation or at any other place that has been designated in the notice of the meeting or by resolution of the Board. Appropriate notices of the meeting complying with both Florida law as well as the Texas Open Meetings Act for those meetings that relate to the operations of the Brooks Academy of Science and Engineering shall be timely posted or published as required by law, and all meetings shall be held and conducted in accordance with applicable open or public meetings laws. The public, any board member or officer of the corporation shall place any desired item on the agenda of any board meeting by notifying, in writing, no later than 5 (five) business days prior to the scheduled board meeting, a description of the item to be placed in the agenda and said descriptions shall be delivered to the then acting secretary of the corporation. Any meetings that relate to the operations of the Brooks Academy of Science and Engineering will be held in the State of Texas. Such meetings of the Board called under Sections 4.7, 4.8, and 4.9 or pursuant to any other provision of these bylaws, shall comply with each and every provision of the Texas Open Meetings Act, which law is hereby incorporated by reference.

Section 4.8 Annual Meetings

The Board shall hold an annual meeting for the purposes of organization, selection of Directors and officers, and the transaction of other business.

Section 4.9 Quarterly Meetings

Quarterly meetings of the Board, shall be held on such dates and at such times and places as may be from time to time fixed and notified by the Board.

Section 4.10 Special Meetings

- a. Special meetings of the Board for any purpose(s) may be called at any time by the Chairman of the Board, if there is such an officer, the President, or the Secretary.
- b. Special meetings of the Board may be held after each Director has received notice by mail, telecopy, e-mail or telephone.
- c. Oral notice shall be deemed received at the time it is communicated, in person or by telephone or wireless, to the recipient or to a person at the office of the recipient whom the person giving the notice has reason to believe will promptly communicate it to the receiver.

Section 4.11 Quorum and Voting

One half (1/2) of the authorized Directors then in the office shall constitute a quorum. The Board shall attempt to reach a general consensus on all actions before the Board; provided, however, that every act or decision done or made by a majority of the Directors present at a meeting duly held at which a quorum is present is an act of the Board. A meeting at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of Directors, if any action taken is approved by at least a majority of the required quorum for such meeting.

Section 4.12 Waiver of Notices

Notice of meeting need not be given to any Director who signs a waiver of notice, a written consent to the holding of the meeting, an approval of the minutes of the meeting, whether before or after the meeting, or who attends the meeting without protesting the lack of notice prior thereto or at its commencement. All such waivers, consents and approvals shall be filed with the corporate records or made a part of the minutes of the meetings.

Section 4.13 Adjournment

A majority of the Directors present, whether or not a quorum is present, may adjourn any Director's meeting to another time and place. If a meeting is adjourned for more than twenty-four (24) hours, notice of such adjournment to another time or place shall be given, prior to the time scheduled for the continuation of the meeting, to the Directors who were not present at the time of the adjournment.

Section 4.14 Rights of Inspection

Every Director has the absolute right to inspect and copy all books, records and documents of every kind and to inspect the physical properties of the corporation provided such inspection is conducted at a reasonable time after reasonable notice, and provided that such right of inspection and copying is subject to the corporation's obligations to maintain the confidentiality of certain books, records and documents under any applicable federal, state or local law.

Section 4.15 Fees and Compensation

Directors shall not receive compensation for their services; however, the Board may approve the reimbursement of a Director's actual and necessary expenses incurred in the conduct of the corporation's business. The corporation shall carry liability insurance covering the Director's and Officers of the corporation as described on the Charter on the conduct of the corporation's business.

Section 4.16 Standard of Care

- a. A Director shall perform all duties of a Director in good faith, in a manner such Director believes to be in the best interests of the corporation and with such care, including the duty to make all reasonable inquiries, as an ordinarily prudent person in a like situation would use under similar circumstances.
- b. In performing the duties of a Director, a Director may rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:
 - i. One or more officers or employees of the corporation whom the Director believes to be reliable and competent in the matters presented;
 - ii. Legal counsel, independent accountants or other persons as to matters that the Director believes to be within such person's professional or expert competence; or
 - iii. A committee of the Board upon which the Director does not serve as to matters within a designated authority, provided the Director believes that the committee merits confidence and the Director acts in good faith, after reasonable inquiry when the need therefore is indicated by the circumstances, and without knowledge that would cause such reliance to be unwarranted.

Section 4.17 Alumni Member

The Board may provide an open seat for a Board candidate who is a high-school graduate of a Somerset Academy school.

The alumni board member must meet all of the criteria of all board members, including but not limited to the following: shall have the ability to travel; shall meet the stated attendance requirements; shall participate in all required Governing Board trainings; and shall submit to, and successfully clear, any and all required fingerprint and/or background checks.

The alumni board member shall serve an initial 2-year term, and shall be subject to the same maximum term limits as described in Section 4.3(d).

ARTICLE 5 OFFICERS

Section 5.1 Officers

The officers of the corporation shall be Chair, Vice Chair, Secretary, and President, each of whom shall be appointed by the Board. The corporation may also have, at the discretion of the Board, a Treasurer and Vice-President, and such other officers and assistant officers as may be elected or appointed by the Board. Any number of offices may be held by the same person, except that the Chair may not also serve as President of the Corporation. Unless otherwise stated, officers need not be a director, or a member of the governing board, in order to hold an office. An officer who does not also serve as a director or a member of the governing board, is not subject to the prohibition against receiving fees or compensation for services rendered to the Corporation. .

5.1.1 Chair

The Chair of Somerset Academy Inc., shall be elected by the Board of Directors of Somerset Academy Inc., at its annual meeting. The Chair may be removed from office as Chair without cause at any time upon an affirmative vote of a majority of the Directors of Somerset Academy Inc.:

- a. The Chair shall be the presiding officer at all meetings of Somerset Academy Inc.
- b. The Chair shall appoint all of the chairs of committees and all members of all committees, subject to the approval or ratification of Somerset Academy Inc. All such committee chairs and members of committees shall serve at the pleasure of the Chair and the Chair may remove the chair(s) of any such committee and any committee member, without cause at any time.
- c. The Chair shall serve as a nonvoting, ex officio member of all committees of the Somerset Academy Inc., and the presence of the Chair may count as quorum at any committee meeting.

5.1.2 Vice-Chair

The Vice- Chair of Somerset Academy Inc., shall be elected by the Board of Directors of Somerset Academy Inc., at its annual meeting. The Chair may be removed from office as Vice-Chair without cause at any time upon an affirmative vote of a majority of the Directors of Somerset Academy Inc.:

- a. The Vice Chair shall be the presiding officer at any meeting when the Chair of Somerset Academy Inc., is absent.
- b. In the event that the office of the Chair is vacant, the Vice Chair shall assume the duties and powers of the Chair until such time as the office of the Chair is no longer vacant.

5.1.3 Secretary

- a. The Secretary shall keep or cause to be kept, at the principal office or such other place as the Board may order, a book of minutes of all meetings of the Board and its committees, including the following information for all such meetings; the time and place of holding; whether regular or special; if special, how authorized; the notice thereof given; the names of those present and absent, and the proceedings thereof. The Secretary shall keep, or cause to be kept, at the principal office in the State of Florida, the original or a copy of the corporation's Articles of Incorporation and Bylaws, as amended to date, and a register showing the names of all directors and their respective addresses. The Secretary shall keep the seal of the corporation and shall affix the same on such papers and instruments as may be required in the regular course of business, but failure to affix it shall not affect the validity of any instrument.
- b. The Secretary shall give, or cause to be given, notice of all meetings of the Board and any committees thereof required by these Bylaws or by law to be given, and shall distribute the minutes of meetings of the Board to all its members promptly after the meetings; shall keep the seal of the corporation in safe custody; shall see that all reports, statements and other documents required by law are properly kept or filed, except to the extent the same are to be kept or filed by the Treasurer; and shall have such other powers and perform such other duties as may be prescribed from time to time by the Board.
- c. The Secretary of the corporation shall keep and maintain, or cause to be kept and maintained, adequate and correct accounts of the properties and business transactions of the corporation, including accounts of its assets, liabilities, receipts and disbursements. The books of account shall at all times be open to inspection by any Director.

5.1.4 President

The Board may hire a President who shall not be a Director and as such, shall be a non-voting position. The President shall not be a member of the Governing Board. The President is the general manager and chief executive officer of the corporation and has, subject to the control

of the Board, general supervision, direction and control of the business and officers of the corporation. The President shall report as directed to the Board at each meeting. The President has the general management powers and duties usually vested in the office of the President and general manager of a corporation as well as such other powers and duties as the Board may prescribe from time to time.

5.1.5 Vice President

The Board may hire a Vice President who shall not be a Director, and as such, shall be a non-voting position. The Vice-President, if any, shall act in the place and stead of the President in the event of the President's absence, inability, or refusal to act. The Vice-President shall have such other powers and perform such other duties as the Board and the President may prescribe from time to time.

5.1.6 Treasurer

The Treasurer, if any, shall insure or cause to be insured, that a true and accurate accounting of the financial transactions of the Corporation is made and that such accounting is presented to and made available to the Board. The Treasurer, if, any, shall perform such other duties as may be prescribed by the Board.

Section 5.2 Election

The officers of the corporation, shall be chosen by the Board at each biennium , or as provided above, and shall serve at the pleasure of the Board, and shall hold their respective offices until their resignation, removal or other disqualification from service, or until their respective successors shall be elected.

Section 5.3 Subordinate Officers

The Board may elect, and may empower the Chair to appoint, such other officers as the business of the corporation may require, each of whom shall hold office for such period, have such authority, and perform such duties as are provided in these Bylaws or as the Board may from time to time determine.

Section 5.4 Removal

Any officer may be removed, either with or without cause, by the Board at any time or, except for an officer chosen by the Board, by any officer upon whom the Board may confer such power of removal. Any such removal shall be without prejudice to the rights, if any, of an officer under any contract of employment.

Section 5.5 Resignation

Any officer may resign at any time by giving written notice to the Board; such resignation may not prejudice the rights, if any, of the corporation under any contract to which the officer is a party. Any such resignation shall take effect at the date of the receipt of such notice or at any later time specified therein, the acceptance of such resignation shall not be necessary to make it effective.

Section 5.6 Vacancies

A vacancy in any office because of death, resignation, removal, disqualification or any other cause shall be filled in the manner prescribed in these Bylaws for regular election or appointment to such office, provided that such vacancies shall be filled as they occur and not on an annual basis.

Section 5.7 Salaries

Each officer, who is not otherwise a Director or a member of the Governing Board, may be paid a reasonable salary, as may from time to time be determined by action of the Board. No such payment shall preclude any officer from serving the Corporation in any other capacity and receiving compensation for such services.

ARTICLE 6 COMMITTEES

Section 6.1 Board Committees

The Board may, by resolution adopted by a majority of the Directors then in office, provided that a quorum is present, create one or more standing or ad hoc committees, each consisting of at least two (2) members of the Board, to serve at the pleasure of the Board.

Section 6.2 Local Governing Body Committees

The Board by resolution or by amendment to these bylaws may create and adopt bylaws for one or more states (each, a "Local Board"), all of whom shall serve at the pleasure of the Board, and may be removed by the Board from such local board, having such powers and responsibilities as are set forth in such bylaws or resolution.

Section 6.3 Development Committee

The Board hereby creates a committee to be known as the "Development Committee," whose members shall be the Liaison Members (as identified in the bylaws of the respective Local Boards) of each of the Local Boards. The Development Committee members shall select one of their members as Chair, and such person shall serve for a term of one year, with re-election as the Committee members shall

determine by their vote so long as such person remains a Liaison Member of a Local Board. Newly elected Liaison Members shall automatically succeed to membership (or become new members in the case of new Local Boards) on the Development Committee, without further act. The Development Committee shall meet on the call of the Chair (meetings shall be by teleconference unless the Board has authorized travel expense) for the purposes of discussing matters related to the Local Boards. In addition, each year the Development Committee shall elect up to three persons (but not more than the number of Local Boards), each of whom shall be a member of one of the Local Boards, to serve as Directors of corporation.

ARTICLE 7 OTHER PROVISIONS

Section 7.1 Validity of Instrument

Subject to the provision of applicable law, any note, mortgage, evidence of indebtedness, contract, conveyance or other written instrument and any assignment or endorsement thereof executed or entered into between the corporation and any other person, shall be valid and binding on the corporation when signed by the President or any Vice President and the Secretary or Treasurer of the corporation, unless the other person has actual knowledge that the signing officers has no authority to execute the same. Any such instruments may also be signed by the Board or a designated member of the Board.

Section 7.2 Construction and Definitions

Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in the Nonprofit Corporation Law of the State of Florida shall govern the construction of these Bylaws. Without limiting the generality of the foregoing, words in these Bylaws shall be read as the masculine or feminine gender, and as the singular or plural, as the context requires, and the word "person" includes both the corporation and a natural person. The captions and headings in these Bylaws are for convenience of reference only and are not intended to limit or define the scope or effect of any provision.

Section 7.3 Fiscal Year

The fiscal year of the corporation shall be set by the Board.

Section 7.4 Conflict of Interest

Any Director, officer, key employee, or committee member having an interest in a contract or other transaction presented to the Board or a committee thereof for authorization, approval, or ratification shall make a prompt, full and frank disclosure of

his or her interest to the Board or committee prior to its acting on such contract or transaction. Such disclosure shall include all relevant and material facts known to such person about the contract or transaction which might reasonably be construed to be adverse to the corporation's interest. The following provisions of Texas law and rules and any amendments thereto: i) Education Code Chapter 12. Charters and, ii) Texas Administrative Code (TAC), Title 19, Part II Chapter 100 as they apply, relate and refer to conflicts of interest are hereby incorporated by reference and applicable to any board member, director, officer, key employee, or committee member having an interest in a contract or other transaction of a charter school sponsored by the Board in Texas.

Section 7.5 Interpretation of Articles of Incorporation

In any instance in which the provisions of these Bylaws are in conflict with the provisions of the Articles of incorporations, the provisions of the Bylaws control.

Section 7.6 Robert's Rules

All Board meetings and committee meetings shall be conducted in accordance with Roberts Rules of Order. In any instance in which the provisions of these Bylaws are in conflict with the provisions of Robert's Rules of Order, the provisions of the Bylaws shall control.


ARTICLE 8
AMENDMENTS

Section 8.1 Bylaws

These bylaws may be adopted or these Bylaws may be amended or repealed by a majority vote of the Board of Directors.

CERTIFICATE OF ADOPTION OF BYLAWS

I certify that I am the elected and acting Secretary of Somerset Academy, Inc., a Florida nonprofit corporation, and that the foregoing Bylaws constitute the Bylaws of such corporation as adopted by the Board of Directors.



SECRETARY

January 2014
DATE

CHARTER SCHOOL EDUCATIONAL SERVICES AND SUPPORT AGREEMENT
BETWEEN
SAMPLE CHARTER SCHOOL, INC
AND
ACADEMICA

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CHARTER SCHOOL EDUCATIONAL SERVICES AND SUPPORT AGREEMENT

This Agreement to provide Educational Services and Support to a Charter School is by and between -
SAMPLE CHARTER SCHOOL, INC. ("CharterSchoolCorp") and ACADEMICA ("Service Provider")

WHEREAS, SAMPLE CHARTER SCHOOL, INC has a contract ("the Charter") with Sponsor County Public Schools (the "Sponsor") to operate a charter school, known as Sample Charter School (the "School");

WHEREAS, School is governed by the Board of Directors of SAMPLE CHARTER SCHOOL, INC (the "Board");

WHEREAS, academic control and freedom are integral to the success of the School and the Board must have complete autonomy and control over its academic program, staffing needs, and curriculum;

WHEREAS, CharterSchoolCorp desires academic support and related services to ensure that its School is operated in accordance with the requirements of its Charter and the requirements of all State and Federal laws, as well as the requirements of local, municipal and/or county ordinances which may be applicable to the operation of the School;

WHEREAS, Service Provider is an educational service provider established to provide professional services and related support to public charter schools;

WHEREAS, it is Service Provider's mission to ensure that the vision of the School's Board of Directors is faithfully and effectively implemented;

WHEREAS, it is Service Provider's duty to implement the vision of the Board of Directors, ensuring the autonomy and governing authority of the Board of Directors; and the Board of Directors' duty to make all decisions and direct Service Provider to act accordingly on the Board's behalf.

WHEREAS, Service Provider's officials are familiar with governmental agencies and requirements needed to establish and operate public charter schools as well as requirements of the Charter, all State and Federal authorities, and the local municipal and/or county government(s) which may be applicable to the operation of the School;

WHEREAS, Service Provider's officials are familiar with the various local, state and/or federal funding sources for charter school programs and have successfully obtained grants and other forms of revenue and financing for various charter school programs in Florida;

WHEREAS, Service Provider works with a network of charter schools and has found there are benefits to establishing charter school cooperatives and sharing best-practices and resources, including methods of reporting, record-keeping and accountability systems; and

WHEREAS, CharterSchoolCorp and Service Provider desire to enter into this agreement for the purpose of having Service Provider provide academic support services and related administrative services to the School at the direction and to the extent instructed by the Board of Directors;

NOW THEREFORE, the parties to this Agreement agree as follows:

DUTIES OF SERVICE PROVIDER:

1. **Recitals**: The foregoing recitals are true, correct and incorporated herein by this reference.

2. **Engagement**

CharterSchoolCorp engages Service Provider to provide support and administrative services to School as more fully set forth herein. Service Provider accepts such engagement pursuant to the terms of this Agreement.

3. **Duties**

At the direction of the Board, Service Provider will coordinate the educational and administrative services required to support the School. In connection with this, Service Provider will report to the Board and advise it of the systems established for administrative duties, including those related to initial setup and the ongoing operational budget. In providing services, Service Provider will comply with all Board and School policies and procedures, the Charter, and with all applicable state and federal rules and regulations. If instructed by the Board, Service Provider's services may include, but not be limited to: identification of potential school-sites; assistance with staff recruitment; assistance with human resource coordination; regulatory compliance; legal and corporate upkeep; assistance with maintenance of the, School and Corporate, assistance with bookkeeping, budgeting and financial forecasting. The Board will review all recommendations made by Service Provider and act upon them in the manner the Board decides.

4. **Board of Directors Meetings**

Service Provider will assist in the coordination of, and attend, the meetings of the Board. Unless otherwise instructed by the Board, Service Provider shall maintain the minutes and records of those meetings and ensure that the School complies with the requirements of State law, and the Charter, regarding such meetings and record keeping.

5. **Record Keeping**

Service Provider will maintain the records of the School at the location designated by the Board, and in compliance with the State and Charter requirements for record keeping. In addition, Service Provider will ensure that designated on-site School staff receive proper training by the Sponsor's appropriate departments for student/school record keeping through its designated Management Information Services (MIS) programs and proper training regarding public records.

6. **Bookkeeping**

At the direction of the Board, Service Provider will coordinate with the accounting firms selected by the Board and serve as liaison with them to ensure the accuracy and timeliness of financial reporting, record keeping, and audits as may be required by the Charter and State law.

7. **Staff Administration**

At the direction of the Board, Service Provider will coordinate with the Board to assist in the identification, advertising efforts, and/or recruitment efforts of qualified principals, teachers, paraprofessionals, administrators and other staff members and education professionals for positions in the School for employment by School. The Board will make all hiring decisions in its discretion and in accordance with law. All employees selected by the Board shall be CharterSchoolCorp employees and will not be employees of Service Provider. The Board will have complete discretion to decide which professional employee management company and its method of human resource management to use, if any.

The teachers employed by the School will be certified as required by Chapter 1002.33, Florida Statutes. CharterSchoolCorp may employ or contract with skilled selected non-certified personnel to assist instructional staff members such as teachers' aides in the same manner as defined in Chapter 1002.33, Florida Statutes and Florida Charter School Legislation. If the Board so chooses, Service Provider may coordinate with the Board, or the Hiring Committee established by the Board, to identify and recruit individuals for School-based positions. As stated above, the Board will make all hiring decisions in its discretion and in accordance with law. All employees selected by the Board for school-based positions shall be CharterSchoolCorp employees and will not be employees of Service Provider. All School-based employees shall be assigned to the School, and may only be removed, dismissed, or transferred by Board approval. Service Provider may, at the direction of the Board, assist in the preparation of employment contracts for review and approval by the Board. Service Provider may propose a professional employer organization to the Board which can perform the human resource outsourcing services for the School. If the Board, in its discretion, approves a human resource outsourcing provider, Service Provider may assist in the coordination of

these services, and agrees to act as the liaison for the School vis-à-vis the professional employer organization. The Board will have complete discretion to decide which, if any, professional employer organization, and its method of human resource outsourcing services, to use.

8. Financial Projections and Financial Statements

Service Provider will prepare annual budgets and financial forecasts for the School to present to the Board for review and approval or disapproval. The School will utilize the standard state codification of accounts as contained in the Financial and Program Cost Accounting and Reporting for Florida Schools, or shall utilize GAAP Accounting and/or other applicable guidelines, at the direction of the Board, as a means of codifying all transactions pertaining to its operations. The Board shall annually adopt and maintain an operating budget. The Board, based on recommendations made by a certified public accounting firm, will adopt accounting policies and procedures. Service Provider will prepare, with the review and approval of the Board, regular unaudited financial statements, as required, to be delivered to the Sponsor, which will include a statement of revenues and expenditures and changes in fund balances in accordance with generally accepted accounting principals. These statements will be provided in advance of the deadline for submission of such reports to the Sponsor. CharterSchoolCorp will provide the Sponsor with annual audited financial reports as required by the Charter. These reports will be prepared by a qualified independent, certified public accounting firm. Service Provider will provide the regular unaudited financial statements, books and records to the auditor for review in connection with the preparation of the reports. The reports shall include a complete set of financial statements and notes thereto prepared in accordance with the Charter and generally accepted accounting principals for inclusion into the School's financial statements annually, formatted by revenue source and expenditures and detailed by function and object.

9. Designated Contact Person

The designated contact person of Service Provider shall be the President of Academica (currently Fernando Zulueta). An alternate contact person shall be the Vice-President and Director of Operations (currently Maggie Fresen).

10. Grant Solicitation

In consultation with the Board, and with Board approval, Service Provider will solicit grants available for the funding of the School from the various government, private and institutional sources which may be available. Such grants may include, but are not limited to federal grants programs and various continuation grants for charter schools.

11. Financing Solicitation and Coordination

If directed by the Board, Service Provider may coordinate obtaining financing from private and public sources for loans desired by the Board.

12. Other Funding Sources

If directed by the Board, Service Provider will coordinate the solicitation of Capital Outlay Funds, if available, from the appropriate state and/or local agencies. Similarly, as directed by the Board, Service Provider will coordinate the solicitation of other available state, federal, or local government funds earmarked for schools and/or facilities development, improvement, or acquisition, as well as other sources of funding that may become available to charter schools from time to time.

13. Annual Reporting

Service Provider will coordinate the preparation of the Annual Report required by the Charter School Legislation for the School. The Report will be submitted to the Board for approval, and Service Provider will coordinate the delivery and review process established by the Sponsor and Charter School legislation for the Annual Report.

14. Student Assessment

At the direction of the Board, Service Provider may coordinate a student assessment methodology, independent from State and/or Sponsor required assessments, and retain on behalf of CharterSchoolCorp professionals to administer and evaluate results. Service Provider will provide the Board with proposals from professionals offering to provide assessment and student evaluation services for the Board either to approve or reject.

15. School Board Representation

At the direction of the Board, Service Provider may serve as primary liaison with the Sponsor and its officials on behalf of the School. In connection therewith, Service Provider's representatives will attend required meetings and public hearings.

16. Governmental Compliance

At the request of the Board, Service Provider will ensure compliance with state regulations and reporting requirements of the Charter School. Service Provider will also ensure the School's compliance with its Charter with the Sponsor, a copy of which is incorporated herein by reference.

17. Charter Renewal Coordination

At the direction of the Board, Service Provider will coordinate with the Sponsor and assist the Board and School in the renewal of the School's Charter on a timely basis. On behalf of, and with the direction of the Board, Service Provider will negotiate the terms of the renewal Charter with the Sponsor, and will provide the Board with notice of and will seek Board approval of any renewal provisions which modify or alter the terms of the original Charter between the School and the Sponsor.

18. Curriculum Development

At the direction of the Board, Service Provider shall identify and or develop curricula in connection with the operations of the School and the vision of the Board in a manner that complies with applicable federal, state and local laws and regulations. All curricula shall be approved by the Board prior to use.

19. Pre-School, After-Care, Early Drop-Off

Service Provider shall identify and/or develop Pre-School, After-Care, and/or Early Drop-Off programs that may be offered as services ancillary to, but separate from the operations of the School. These are programs that are not encompassed by the Charter School Agreement between the School and the Sponsor. Accordingly, the School may elect not to offer these programs directly, but rather to authorize Service Provider to do so. In furtherance of that, Service Provider will retain the necessary operators to provide the underlying services to the parents and students desiring them. Service Provider will coordinate the provision of those services directly where applicable and establish agreements to reimburse the School for the use of the facilities, utilities, cleaning services and other costs consumed or incurred by those uses. Service Provider and/or the selected service providers shall be the direct primary supplier to the parents and students of those ancillary services and will indemnify and hold harmless the School for any liability resulting from them. The terms and conditions for these programs including financial terms, operating procedures, and ownership, shall be subject to Board review and approval.

20. School-Site Identification

At the direction of the Board, Service Provider shall coordinate with the Board for the purpose of identifying CharterSchoolCorp's school-site needs from year-to-year. In connection therewith, Service Provider shall assist the Board in identifying potential school sites or in the potential expansion of existing sites. Service Provider may identify and solicit investors to acquire and/or develop school sites for lease or use by CharterSchoolCorp. Where such investors are related to Service Provider or its principles, such relationship will be disclosed to the Board. At the direction of the Board, Service Provider shall recommend qualified professionals, who the Board may retain, in the fields of school design, architecture, and engineering, as well as professionals in

the areas of development and construction, for the expansion, design, development, and/or construction of new and/or existing school sites.

21. Systems Development

For the benefit of and at the direction of the Board, Service Provider will identify and develop a school information system to be used in connection with the administration and reporting system for the School. This includes, but is not limited to, accounting documentation filing systems, student records systems, computer systems, and telecommunications services.

TERM OF AGREEMENT

22. Initial Term

The term of the Agreement shall commence on the start of the 2016-2017 school year. The commencement date shall be deemed to be July 1, 2016, although the parties recognize that Service Provider has provided services to the Board in connection with the School and Charter before this date.

The initial term of this Agreement shall be five (5) years, unless the Board for cause terminates this Agreement per section 24 of this Agreement. At the conclusion of the term of this Agreement, CharterSchoolCorp shall have the option to renew this contract with Service Provider.

23. Renewal

Unless terminated by the Board, the terms of this Agreement shall be renewed along with any renewals to the Charter Agreement. Service Provider agrees to renew this Agreement at CharterSchoolCorp's option on the then-current terms and conditions unless there has been an uncured material breach hereunder by CharterSchoolCorp, after 60 days written notice of such breach and demand for cure, or unless CharterSchoolCorp has given at least 90 days' notice that this Agreement will not be renewed.

24. Termination

In the event of a breach of this Agreement by either party, the non-breaching party shall give the other party written notice of such breach and sixty (60) days to cure such breach from the date of giving such notice to Service Provider. "Breach" shall be defined as a material breach of this Agreement by Service Provider or CharterSchoolCorp; the failure of Service Provider to provide educational support and related services sufficient to operate the School in a manner that complies with the standards of the Sponsor; any debarment of or similar action against Service Provider by any governmental entity; or any action or conduct by Service Provider or its principals that may bring disrepute to the School or Board (e.g., any arrest or conviction for a crime of moral turpitude or any

felony) or that may endanger or materially lessen the safety of students. If the Sponsor terminates or materially changes its Charter Agreement with the School or Board for the operation of the School, either the School or Board, or Service Provider may upon thirty (30) days written notice terminate this Agreement without penalty or liability of any kind to either party. Either party may terminate this Agreement at any time and for any reason, irrespective of cause, upon providing the other party 90 days' notice of termination. In the event of termination of this Agreement for any reason, the compensation to be paid by CharterSchoolCorp to Service Provider under this Agreement shall be pro-rated.

COMPENSATION

25. Base Compensation

CharterSchoolCorp shall pay Service Provider a service fee of \$450 per student Full Time Equivalent (FTE) per annum during the term of this Agreement, unless terminated, provided CharterSchoolCorp receives such funds. The fee shall be payable in equal monthly installments, provided that CharterSchoolCorp shall have no obligation to pay such fee before receiving its FTE funding from the Sponsor or the State of Florida, in which event the monthly installments shall accrue until funding is received. The service fee shall be adjusted annually at each anniversary of this Agreement based on the change in the prior year's Consumer Price Index or on the basis of the year-to-year percentage change in the per student Full Time Equivalent (FTE) funding provided to the school under the law, whichever is less, but in no event shall any adjustment reduce the service fee below the initial level of \$450 per student Full Time Equivalent (FTE) per annum as stated above.

26. Additional Services

Service Provider will provide additional services not covered under this Agreement to the Board as requested by the Board by proposal to Service Provider and the Board and subject to Board approval. This may include services that are not within the regular course of running the School, including but not limited to special projects, litigation coordination, and land use coordination. Such projects may include the engagement, at the expense of CharterSchoolCorp, of other professionals or consultants who may be independent from Service Provider or part of Service Provider's network of consulting professionals.

27. Reimbursement of Costs

Service Provider shall be reimbursed for actual costs incurred in connection with travel, lodging, and food, attending required conferences and other events on behalf of the School, provided that the Board shall give prior written approval for such cost.

28. Incurred Expenses

Pursuant to the agreement of the Board and Service Provider, Service Provider, in its discretion, may defer some or all of the service fees and/or costs for additional services and/or reimbursements due hereunder from one fiscal year to the next, which will be duly noted in the schools financial records.

OTHER MATTERS

29. Conflicts of Interest

No officer, shareholder, employee or director of Service Provider may serve on the Board. Service Provider will comply with the Conflicts of Interest rules set out in the Charter. In addition, if there exists some relationship between Service Provider, its officers, directors or principals and any other person or entity providing goods or services to the School, Service Provider agrees to disclose the relationship to the Board.

30. Insurance and Indemnification

Service Provider shall carry liability insurance and indemnify the School for acts or omissions of Service Provider. Service Provider agrees to provide, upon request of the Board, certificates of insurance with carriers, in amounts and for terms reasonably acceptable to the Board and naming Board as additional insured. School shall carry liability insurance and indemnify the Service Provider for acts or omissions of School. School agrees to provide, upon request of the Service Provider, certificates of insurance with carriers, in amounts and for terms reasonably acceptable to the Service Provider, and naming Service Provider as additional insured.

School shall indemnify and save Service Provider harmless from and against, and shall reimburse Service Provider for, any and all liabilities, obligations, damages, fines, penalties, claims, demands, costs, charges, judgments and expenses, whether founded in tort, in contract, or otherwise, (including the costs of defense and settlement and reasonable attorney's fees) which such party may incur, become responsible for, or pay out as a result of claims connected to the acts, services, conduct or omissions of School, its employees or agents, attorney's fees and costs, which may be imposed upon or incurred or paid by or asserted against Service Provider by reason of or in connection with the performance of any provision of this Agreement, or any act or neglect of School or Schools officers, directors, trustees, agents, contractors, servants, employees, invitees, in connection with Schools obligations under this Agreement. In the event Service Provider shall, without fault on its part, be made a party to any litigation commenced by or against School, then School shall protect and hold Service Provider harmless and shall pay all costs, expenses, and attorney's fees incurred by Service Provider in connection with such litigation, including any appeals.

Nothing contained in this provision shall be deemed to require School to indemnify Service Provider for any acts or omissions of Service Provider, its agents, contractors, servants, employees, licensees, or invitees, or for breach of this Agreement, nor shall this provision be deemed to require School to indemnify Service Provider for Service Provider's own gross negligence, or the gross negligence of Service Provider's agents, contractors, servants, employees, licensees, or invitees, nor shall this provision operate to release Service Provider from its own affirmative duties with respect to this Agreement.

Service Provider shall indemnify and save School harmless from and against, and shall reimburse School for, any and all liabilities, obligations, damages, fines, penalties, claims, demands, costs, charges, judgments and expenses, whether founded in tort, in contract, or otherwise, (including the cost of defense and settlement and reasonable attorney's fees) which such party may incur, become responsible for, or pay out as a result of claims connected to the acts, services, conduct or omissions of Service Provider, its employees or agents, attorney's fees and costs, which may be imposed upon or incurred or paid by or asserted against School by reason of or in connection with the performance of any provision of this Agreement, or any act or neglect of Service Provider or Service Providers officers, directors, trustees, agents, contractors, servants, employees, invitees, in connection with Schools obligations under this Agreement. In the event School shall, without fault on its part, be made a party to any litigation commenced by or against Service Provider, then Service Provider shall protect and hold School harmless and shall pay all costs, expenses, and attorney's fees incurred by School in connection with such litigation, including any appeals.

Nothing contained in this provision shall be deemed to require Service Provider to indemnify School for any acts or omissions of School, its agents, contractors, servants, employees, licensees, or invitees or for breach of this Agreement, nor shall this provision be deemed to require Service Provider to indemnify School for School's own gross negligence, or the gross negligence of School's agents, contractors, servants, employees, licensees, or invitees, nor shall this provision operate to release School from its own affirmative duties with respect this Agreement.

Notwithstanding anything stated in this Agreement to the contrary, the Agreement and all provisions contained herein shall be subject to and governed by F.S. 768.28 as amended.

31. Miscellaneous

(1) Neither party shall be considered in default of this Agreement if the performance of any part or all if this Agreement is prevented, delayed, hindered or otherwise made impracticable or impossible by reason of any

strike, flood, hurricane, riot, fire, explosion, war, act of God, sabotage, accident or any other casualty or cause beyond either party's control, and which cannot be overcome by reasonable diligence and without unusual expense.

(2) This Agreement shall constitute the full, entire and complete agreement between the parties hereto. All prior representations, understandings and agreements are superseded and replaced by this Agreement. This Agreement may be altered, changed, added to, deleted from or modified only through the voluntary, mutual consent of the parties in writing, and said written modification(s) shall be executed by both parties. Any amendment to this Agreement shall require approval of the Board.

(3) Neither party shall assign this Agreement without the written consent of the other party;

(4) No waiver of any provision or default under this Agreement shall be deemed or shall constitute a waiver of any other provision or default unless expressly stated in writing.

(5) If any provision or any part of this Agreement is determined to be unlawful, void or invalid, that determination shall not affect any other provision or any part of any other provision of this Agreement and all such provisions shall remain in full force and effect.

(6) This Agreement is not intended to create any rights of a third party beneficiary.

(7) This Agreement is made and entered into in the State of Florida and shall be interpreted according to and governed by the laws of that state. Any action arising from this Agreement, shall be brought in a court in County, Florida.

(8) In the event of a dispute arising from this Agreement, the prevailing party shall be awarded reasonable attorneys' fees and costs.

(9) Every notice, approval, consent or other communication authorized or required by this Agreement shall not be effective unless same shall be in writing and sent postage prepaid by United States mail, directed to the other party at its address hereinafter provided or such other address as either party may designate by notice from time to time in accordance herewith:

Academica
6340 Sunset Drive
Miami, Florida 33143
Attn: President

Sample Charter School Inc.
ADDRESS LINE 1
ADDRESS LINE 2
Attn: Chairperson

(10) The headings in the Agreement are for convenience and reference only and in no way define, limit or describe the scope of the Agreement and shall not be considered in the interpretation of the Agreement or any provision hereof.

(11) This Agreement may be executed in any number of counterparts, each of which shall be an original, but all of which together shall constitute one Agreement.

(12) Each of the persons executing this Agreement warrants that such person has the full power and authority to execute the Agreement on behalf of the party for whom he or she signs.

THIS AGREEMENT was approved at a meeting of the Board of Directors of SAMPLE CHARTER SCHOOL, INC held on the _____ day of _____ 2015. At that meeting, the undersigned Director of SAMPLE CHARTER SCHOOL, INC was authorized by the Board to execute a copy of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Contract as of the day and year first above written.

CharterSchoolCorp

(For SAMPLE CHARTER SCHOOL)

By: _____ Date: _____
_____, Chair / President

ACADEMICA

By: _____ Date: _____
Fernando Zulueta, President

SAMPLE

JOB DESCRIPTION

POSITION TITLE: School Principal

CONTRACT YEAR: Twelve Months

QUALIFICATIONS

EDUCATION: An earned master's Degree (or higher) from an accredited college or university

EXPERIENCE

REQUIRED: A total of five (5) years of school experience is required; which includes a minimum of three (3) years of required experience as a Principal/Assistant School Principal.

Valid Florida Certification in School Principal, or Professional School Principal.

REPORTS TO: School Governing Board

SUPERVISES: All Administrative, Instructional, and Non-Instructional staff at the school.

POSITION GOAL: To provide the leadership and management necessary to administer and implement all programs, activities and policies essential to ensure high quality educational experiences and services for all students in a safe, nurturing, and enriching environment.

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

LEADERSHIP

The School Principal shall:

- Administer, control, and supervise the instructional program of the school operations and school personnel.
- Encourage teachers and pupils to perform to the best of their ability.
- Interpret the educational program of the school and school system to the community.
- Provide leadership and direction for all aspects of the school's operation.
- Facilitate frequent communication with parents of the school community.

- Coordinate and adapt school curricular programs and policies.
- Assume responsibility for the buildings, grounds, equipment and supplies of the school; supervise the work of the custodians and maintenance staff; report to the governing board the conditions and needs of the school.
- Develop, implement, and evaluate the School Improvement Plan.
- Keep accurate account of all money paid to the school and record the purpose for which it was paid.
- Supervise and coordinate the budgetary process.
- Coordinate and conduct the interview process and make hiring and termination decisions for all staff.
- Develop and supervise New Teacher programs.
- Compile and prepare all student achievement outcomes.
- Report directly to the Governing Board for all purposes.
- Coordinate, supervise, and conduct the evaluations of all staff.
- Oversee the School Advisory Council.
- Maintain a positive and productive relationship with the Parent-Teacher Association.
- Supervise all students and staff.
- Coordinate and supervise the testing and assessment program.
- Enforce the discipline plan and assist teachers with all concerns and issues related to student behavior.
- Serve as final arbitrator for serious discipline problems in accordance with Sponsor and Board's policy and state statutes.
- Establish, actively pursue, and monitor a school mission, vision and goals in collaboration with staff, parents, students, and other stakeholders that are aligned with the Board's mission and goals.
- Supervise and coordinate school-wide programs, curricula and course options.
- Supervise and coordinate student registration, scheduling, and master scheduling construction.
- Oversee the grade reporting system.
- Monitor substitute teachers and the class coverage process.
- Supervise school activities and special events, and initiate fundraising activities.
- Establish business partnerships and positive relationships with community leaders.
- Maintain a master schedule of all school activities and events, including extracurricular trips.
- Coordinate and schedule the use of facilities for all events.
- Implement and enforce attendance and tardy policies and procedures for all students.
- Exercise proactive leadership in promoting the vision and mission of the school.
- Model and maintain high standards of professional conduct.
- Set high standards and expectations for self, others, and school.

- Demonstrate satisfactory or above performance on the Florida Principal Competencies while performing all duties required by the job description.
- Provide leadership in the implementation of the Florida Standards Assessment (FSA) and other state mandated assessments designed and adapted to measure student achievement.
- Maintain active involvement in the school improvement planning process with the School Advisory Council by providing resources for decision-making and priority setting.
- Use quality improvement principles and process in daily administration of school.
- Implement procedures and policies that ensure a safe and orderly learning environment.
- Anticipate difficult situations and develop plans to handle them.
- Manage and administer the development, implementation and assessment of the instructional program at the assigned school so as to ensure student growth and achievement is continuous and appropriate.
- Use collaborative leadership style and quality processes to involve stakeholders in establishing and achieving the school's mission and goals.
- Provide leadership and direction for all aspects of the school's operation.
- Build teams to accomplish plans, goals and priorities.
- Conduct staff meetings to discuss policy changes, instructional programs, potential problems and resolution of existing problems.
- Use appropriate interpersonal styles and methods to guide individuals or groups to task accomplishment.
- Act quickly to stop possible breaches of safety, ineffective procedures, or interference with operations.
- Communicate effectively both orally and in writing with parents, students, teachers and the community.
- Communicate school information, goals, student learning and behavior expectations to stakeholders.
- Develop and maintain a school atmosphere conducive to learning and student achievement.
- Maintain visibility and accessibility on the school campus and at school related activities and events.
- Establish procedures used in the event of school crisis and/or civil disobedience and provide leadership in the event of such incidents.
- Provide leadership to involve the school in quality initiatives.
- Establish procedures for an accreditation program and monitor standards to ensure they are met.
- Provide for the articulation of the school's instructional program among school personnel.
- Use effective communication techniques with students, teachers, parents and stake holders.
- Communicate, through proper channels, to keep Board of Directors informed of impending problems or events of an unusual nature.

INFORMATION & ANALYSIS

- Address the diverse needs of the school population consistent with the Board's policies and Strategic Plan.
- Use current research, performance data, and feedback from students, teachers, parents and community to make decisions related to improvement of instruction.
- Provide leadership and direction for the implementation and evaluation of curriculum and instruction at the school.
- Analyze and use data for decision-making to improve actions, plans, and processes.
- Access, analyze, interpret and use data in decision-making.
- Use key information such as benchmarks and comparison data in the analysis of results to effectively measure performance.
- Make data accessible to all stakeholders

STRATEGIC PLANNING

- Develop long and short- term plans and goals within the School Improvement Plan, aligned with the strategic plan of the Board.
- Collaborate and provide resources to ensure the development of the School's Improvement Plan.
- Communicate overall School Improvement Plan requirements to all staff so each employee can understand how the goals and plans relate to his/her work.
- Allocate resources consistent with implementation of the School Improvement Plans.
- Utilize a systematic process for collecting input from stakeholders and incorporates customer requirements in development of School Improvement Plan.
- Establish procedures to monitor processes, activities and responsibilities and respond to feedback.
- Establish and coordinate procedures for student, teacher, parent and community evaluation of curriculum.
- Direct the development of the master schedule and assign teachers according to identified needs.
- Facilitate the horizontal and vertical articulation of curriculum within the school as well as between the school and its feeder system.
- Oversee the selection and acquisition of instructional materials and equipment
- Collect input and analyze data to develop goals.
- Set high goals and standards for self, others and the organization..
- Provide recognition and celebration for student, staff, and school accomplishments.

COMMUNITY ENGAGEMENT

- Facilitate a program of family and community involvement.
- Develop positive relationships with students, parents, teachers, community.
- Work with parents to resolve complaints or concerns.
- Develop and maintain positive school/community relations and act as liaison between the two.
- Promote/market the school and its priorities to the community
- Establish processes and methods to respond to valid customer requirements.
- Facilitate, coordinate, and monitor the implementation of Student Education programs and services.
- Implement procedures to ensure that rights of children with disabilities and parents of such children are protected.
- Interact with government and service agencies relative to student welfare.
- Establish processes to determine customer needs and level of satisfaction.
- Establish guidelines for desirable student conduct and follow suspension and expulsion policies and procedures.
- Supervise the implementation of the school's student services plan, including guidance, drop-out prevention, health services, attendance and related areas.
- Take appropriate reporting and/or referral action whenever abuse situations are recognized.
- Provide leadership support for community involvement programs and business partnerships at the school level.
- Direct and develop the recruitment of Business Partners to benefit the school and community.
- Develop activities with business partners that promote student achievement.

HUMAN RESOURCES

- Manage appropriately and professionally personnel issues, including hiring, evaluations, staff deficiencies and retention; provides feedback on professional performance and offer assistance to strengthen weaknesses in performance.
- Interview and select qualified personnel
- Establish job assignments, supervise all assigned personnel, and conduct performance evaluations in accordance with current board policies and legislation.
- Delegate responsibilities to appropriate staff members.
- Make difficult personnel decisions according to policy when necessary including dealing with ineffective teacher or other staff performance.
- Establish and maintain individual professional development plans for each instructional employee that is linked to student achievement.

- Assign tasks and supervise personnel in task accomplishment including special projects.
- Analyze data and information to plan staff development to accomplish school goals.
- Complete annual Needs Assessment to determine staff development needs.
- Lead and manage development of personnel through staff development, in-service and other developmental activities that are linked to student achievement gains and the school improvement plan.
- Facilitate the development and implementation of an effective staff development program.
- Participate, successfully, in the staff development programs offered to increase the individual's skill and proficiency related to the assignment
- Build a school community and environment, which supports learning and growth for everyone toward realization of the school's mission.
- Participate in Governing Board management meetings and other activities to enhance professional development.
- Serve as a coach/mentor to assistant principals or others who are preparing for School Principal certification.
- Review current developments, literature and technical sources of information related to job responsibility.
- Use team approaches in solving problems and improving processes and providing frequent feedback to those involved in improvement efforts.
- Consider data and results from action research when solving problems and improving processes.
- Contribute to positive staff morale through flexibility, support and recognition of groups and individuals working toward school improvement.
- Consider the aspirations of self and others in relation to the jobs and tasks assigned when assessing expertise and developmental needs.

OPERATIONS

- Manage and supervise the school's financial resources, including the preparation and disbursement of the school's budget and internal accounts.
- Establish and manage student accounting and attendance procedures at the school.
- Coordinate and manage the extra curricular student activities and funds at the school.
- Show positive trends in the achievement of improvement goal results in the areas of Operation, business practices (efficiency) and customer satisfaction.
- Demonstrate readiness and confidence in making and/or sharing decisions with those involved in a timely fashion.
- Employ an improvement cycle for operational problems that analyzes results, identifies root causes and takes corrective action.

- Supervise and monitor the accurate completion of data collection and submit resulting reports according to timelines.
- Coordinate school maintenance and facility needs and monitor progress toward meeting those needs.
- Identify quality requirements of materials/services and communicate this information to parents, community and suppliers.
- Access Sponsor and community resources to meet school needs.
- Coordinate plant safety and facility inspections at the assigned school
- Monitor the maintenance at the school to ensure a safe, clean, and healthy, learning environment.
- Coordinate the school food service program at the school including the free and reduced food service requirements.
- Supervise transportation services at the school.
- Write and disseminate newsletters, memos, letters, press releases, agendas, and other materials using proper grammar and punctuation.
- Provide leadership in the effective use of technology in the classroom and in school administration.

Job Description

POSITION TITLE: Assistant Principal

CONTRACT YEAR: Twelve Months

QUALIFICATIONS

EDUCATION: An earned Master's Degree or higher from an accredited institution.
Certifications: Valid Florida Certification in Educational Leadership, Administration, Administration & Supervision, School Principal or Professional School Principal at the appropriate grade level for the school.

EXPERIENCE

REQUIRED: Three (3) years teaching experience at a school site. Demonstrated ability to communicate effectively in both oral and written forms.

PREFERRED: 1-3 years of administrative experience at a school site.

REPORTS TO: School principal and school Board of Directors

SUPERVISES: Instructional and Service Personnel assigned by the principal.

POSITION GOAL: To assist the Principal in providing vision and leadership to develop, administer and monitor educational programs that optimize the human and material resources available for a successful and safe school program for students, staff and community.

SKILLS AND ABILITIES: The Assistant School Principal will effectively perform the performance responsibilities using the following skills and abilities:

- read, interpret and implement the appropriate state and federal statutes and policies, Sponsor's Policies and school board policies and procedures
- use group dynamics within the context of cultural diversity and be knowledgeable of Florida educational reform, accountability and effective school concepts
- demonstrate knowledge and practice of current educational trends, research and technology

- understand the unique needs, growth problems and characteristics of school students
- train, supervise and evaluate personnel
- demonstrate effective communication and interaction skills with all stakeholders

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

The Assistant School Principal shall:

LEADERSHIP

- Use collaborative leadership style and quality process to involve stakeholders in establishing and achieving the school's mission and goals.
- Assist the principal in providing leadership and direction for all aspects of the school's operation.
- Assist in establishing and monitoring a school mission and goals that are aligned with the Board's mission and goals.
- Exercise proactive leadership in promoting the vision and mission of the Board's Strategic Plan.
- Maintain an active involvement in the school improvement planning process.
- Assist with establishing and monitoring procedures for an accreditation program and monitor standards to ensure they are met.
- Provide for the articulation of the school's instructional program among school personnel.
- Assist in the management and development of the implementation and assessment of the instructional program at the school to ensure all students have equal learning opportunities.
- Use quality improvement principles and processes in daily administration of school.
- Assist in developing and maintaining a safe school atmosphere conducive to learning and student achievement.
- Maintain visibility and accessibility on the school campus and at school related activities and events.
- Assist in conducting staff meetings to discuss policy changes, instructional programs, potential problems and resolution of existing problems.
- Build teams to accomplish plans, goals and priorities.
- Assist in the establishment of procedures used in the event of school crisis and/or civil disobedience and provide leadership in the event of such incidents.
- Act quickly to stop possible breaches of safety, ineffective procedures, or interference with operations.
- Anticipate difficult situations and develop plans to handle them.
- Serve as arbitrator for serious discipline problems in accordance with School policies, board and Sponsor's policies and state statutes.

- Communicate effectively both orally and in writing with supervisors, parents, students, teachers and the community.
- Use appropriate interpersonal styles and methods to guide individuals or groups to task accomplishment.
- Model and maintain high standards of professional conduct while setting high standards and expectations for self, others, and school.

INFORMATION & ANALYSIS

- Address the diverse needs of the school population
- Assist in providing leadership and direction for the implementation and evaluation of curriculum and instruction at the school.
- Use current research, performance data, and feedback from students, teachers, parents and community to assist in making decisions related to improvement of instruction.
- Analyze and use data for decision-making or to improve actions, plans and process.
- Access, analyze, interpret and use data in decision-making.
- Use benchmarks and comparison data in the analysis of results and make data accessible to all stakeholders.

OPERATIONS

- Assist with managing and supervising the school's financial resources including the school's internal accounts.
- Assist with establishing and managing student accounting and attendance procedures at the school.
- Supervise and monitor the accurate completion of data collection and submit resulting reports according to timelines.
- Assist with the coordination of school maintenance and facility needs and monitor progress toward meeting those needs.
- Assist with coordinating plant safety and facility inspections at the school.
- Assist in coordinating the school food service program at the school, including the free and reduced food service requirements.
- Assist with the supervision of all extracurricular programs at the school.
- Provide leadership in the effective use of technology in the classroom and in school administration.
- Assist with the writing and dissemination of newsletters, memos, letters, press releases, agendas, and other materials using proper grammar and punctuation.
- Perform other tasks consistent with the goals and objectives of this position as assigned by the Principal.

STRATEGIC PLANNING

- Assist with facilitating and coordinating the development of the School Improvement Plan.

- Assist in communicating overall School Improvement Plan requirements to all staff each employee can understand how the goals and plans relate to his/her own work.
- Assist in allocating resources consistent with the implementation of the School Improvement Plan.
- Collect input and analyze data to develop goals.
- Assist in the selection and acquisition of instructional materials and equipment.
- Assist with establishing and coordinating procedures for student, teacher, parent, and community evaluation of curriculum.
- Assist with facilitating the horizontal and vertical articulation of curriculum within the school.
- Develop the master schedule and assign teachers according to identified needs.
- Assist with providing recognition and celebration for student, staff, and school accomplishments.
- Set high goals and standards for self, others and the organization.

COMMUNITY ENGAGEMENT

- Develop positive relationships with all stakeholders (students, parents, teachers, community).
- Assist with facilitating a program of family and community involvement.
- Develop and maintain positive school/community relations and act as liaison between the two.
- Assist in promoting/marketing the school and its priorities to the community.
- Assist in providing leadership to support community involvement programs and business partnerships at the school level.
- Assist in directing and developing the recruitment of Business Partners to benefit the school and community.
- Assist with the development of activities with business partners that promote student achievement.
- Assist in facilitating, coordinating, and monitoring the implementation of Student Education programs and services.
- Work with parents to resolve complaints or concerns.
- Interact with government and service agencies relative to student welfare.
- Take appropriate reporting and/or referral actions whenever abuse situations are recognized.
- Assist in supervising the implementation of the school's student services (including guidance, health services, and attendance) and other related areas.

HUMAN RESOURCES

- Manage issues, including hiring, evaluation, staff deficiencies and retention; appropriately and professionally personnel.
- Assist with interviewing and selection of qualified personnel to be recommended for appointment.
- Assist with difficult personnel decisions when necessary including dealing with ineffective teacher or staff performance.
- Delegate responsibilities to appropriate staff members.
- Assign tasks and supervise personnel in task accomplishment including special projects.
- Assist with the development and implementation of an effective staff development program.
- Assist in analyzing data and information to plan staff development to accomplish school goals.
- Assist with providing staff development opportunities and feedback to school personnel.
- Participate, successfully, in the staff development programs offered to increase the individual's skill and proficiency related to the assignment.
- Review current developments, literature and technical sources of information related to job responsibility.
- Use team approaches in solving problems and improving processes and provides frequent feedback to those involved in improvement efforts.
- Contribute to positive staff morale through flexibility, support and recognition of groups and individuals working toward school improvement.
- Provide feedback on professional performance and offer assistance to strengthen weaknesses in performance.

JOB DESCRIPTION

POSITION TITLE: Teacher

CONTRACT YEAR: Ten-Month Salaried - Annual Contract

QUALIFICATIONS

EDUCATION: Bachelor's degree from an accredited college or university;
Certifications: valid Florida certification in the subject area.

EXPERIENCE PREFERRED: Experience - Two (2) years of successful classroom experience in the appropriate subject area.

REPORTS TO: Principal

POSITION GOAL: To create and maintain a classroom atmosphere that generates high expectations and enthusiasm for learning by infusing critical thinking skills, application skills, interpersonal skills, and technology into an aligned curriculum and assessment process, resulting in measurable achievement gains for all students.

SKILLS AND ABILITIES

The teacher shall:

- Possess knowledge of curriculum Florida standards in the appropriate subject area.
- Be able to adapt, design and implement curriculum to meet the needs of the individual students.
- Be able to suggest educational and classroom management strategies, materials and techniques to parents and other support personnel working with students.
- Be able to use observation techniques for identification, ongoing re-evaluation and planning for students.

ESSENTIAL PERFORMANCE RESPONSIBILITIES

The teacher shall:

DEMONSTRATE PROFICIENCY

- Demonstrate mastery of all state competencies

- Demonstrate mastery of all twelve of the teacher practices benchmarks for the 21st century at the professional and eventually the accomplished level
- Demonstrate knowledge and understanding of the subject matter
- Foster students' achievement gains from baseline assessment levels to be evident in pre/post test comparison results, standardized test scores, and portfolios
- Assist the administration and staff to develop and implement a school-wide behavior management system aligned to the Board's policies and procedures.
- Provide supportive classroom management and academic strategies to teachers, students, and parents.

DEMONSTRATE INITIATIVE

- Demonstrate efficiency
- Demonstrate punctuality
- Demonstrate consistent attendance
- Review current developments, literature and technical sources of information related to job responsibility.
- Initiate and present innovative ideas for special projects, school functions, field trips, extracurricular activities, and clubs
- Initiate opportunities for professional development
- Provide supplemental instruction

PARTICIPATE IN CONTINUED PROFESSIONAL DEVELOPMENT

- Demonstrate oral and written proficiency
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignments.
- Pursue further education and supplemental credentials

UNDERSTAND AND EMPLOY A VARIETY OF EDUCATIONAL TECHNOLOGIES, STRATEGIES, AND TEACHING STYLES

- Employ differentiated instructional strategies to maximize learning
- Role model using the state competency checklist
- Consistently maintain portfolios (dating and ordering each piece)

SERVE AS ROLE MODELS FOR STUDENTS AND FUTURE TEACHERS

- Role model using the state competency checklist
- Promote problem-solving skills and character education
- Promote and enforce school rules

ADVISE PARENTS

- Keep parents updated through interim reports, report cards, phone calls, and notes home
- Encourage and facilitate parental and community involvement promoting student achievement
- Document parent phone calls, conversations, and conferences

- Work as partners to create behavior modification plans and create Progress Monitoring Plans (PMP) for students
- Maintain flexibility and frequent contact with parents about student progress and school events

DEMONSTRATE AWARENESS OF EACH STUDENT'S EDUCATIONAL NEEDS

- Continually assess students' development (psychological and academic) through clearly defined rubrics
- Establish, maintain, assess, and (if needed) modify individual student progression plans
- Identify those students who exhibit exceptional thinking styles and behaviors and implement and/or accommodate those exceptional needs
- Assist in data collection and preparation of reports including individualized educational plans of instruction for students.

WORK COOPERATIVELY AND PRODUCTIVELY WITH CO-WORKERS

- Interact with maturity and professionalism among administration, staff, and students at all times
- Take initiative to implement projects, programs, and/or compensate for shortcomings within classroom and/or the school environment
- Exhibit congeniality among co-workers, students, and parents
- Show assertiveness - delegate when necessary
- Be a team player while respecting others differences
- Separate professional and personal spheres
- Be flexible - always have a back-up plan
- Be willing to help where help is needed

FOLLOW GUIDELINES REGARDING SAFETY AND EDUCATION

- Supervise student recreation (having at least one person in the classroom at all times)
- Complete and maintain accident reports (keeping one in a permanent file and sending one copy to parents)
- Keep emergency numbers at hand and a stocked first aid kit accessible in classroom
- Maintain up-to-date lesson plans within curriculum guidelines
- Complete, distribute, and maintain files of all behavior and homework referrals as required (one in permanent folder, one sent home)
- Complete and maintain files of all report cards, interim reports, and county test records
- Follow safety requirements regarding aisles, doorways, fire alarms, and fire extinguishers at all times
- Participate in monthly fire and other safety drills
- Keep dangerous objects (knives, rocks, etc.) and toxic substances (ammonias, medicines, etc.) out of the reach of children at all times

- Follow appropriate County medication guidelines for all students (remember never to give Tylenol, cough drops, or any prescription medications without the written consent of the parent and administrator and accompanied by the appropriate medical forms)

PARTICIPATE ACTIVELY IN SCHOOL FUNCTIONS

- Attend parent/teacher meetings and conferences
- Plan and participate in special events
- Perform other duties as assigned by the Principal.

JOB DESCRIPTION

POSITION TITLE: Guidance Counselor (Budgeted under contracted services)

CONTRACT YEAR: 10-12 Months

QUALIFICATIONS

EDUCATION: An earned master's degree from an accredited institution; Florida certification in Guidance and Counseling. Bilingual skills preferred. Computer skills as required for the position.

REPORTS TO: Principal or designee

POSITION GOAL: To implement a process to help students discover and develop their best talents for personal happiness and social usefulness.

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

The Guidance Counselor shall:

- meet with parents/students prior to and during the registration process, inform the students of classes relative to course selection and assist the administration in the registration and scheduling process.
- Assist in development of the school's master schedule
- conduct follow-up meetings after the master schedule is developed to make any necessary changes in students' schedules.
- conduct orientation meetings to provide information regarding class offerings and registration procedures.
- provide individual counseling for students regarding scheduling upon request of the student or his/her parent/guardian.
- counsel students on personal and academic concerns and notify parents as deemed necessary.
- evaluate credits from outside sources
- provide training to teachers, parents and students on pupil progression plan
- provide materials and suggestions for classroom oriented guidance activities.
- arrange student, parent and teacher conferences.
- acquaint students new to the school with teachers, facilities and programs to help them adjust to their new environment.
- assist in the early identification of students for proper educational placement, such as exceptional child, federal and bilingual programs.
- work with parent groups in the area of child growth, development and discipline.

- meet with teachers to present and explaining the results of various testing programs.
- assist teachers in effective utilization of test results.
- identify community and school system resources and when advisable, refer student situations to the proper agencies.
- keep records of conferences and send reports within the limits of confidentiality, to the principal, administrative assistants, and/or teachers as requested.
- gather information from all faculty members having contact with a student being considered for referral.
- review current developments, literature and technical sources of information related to job responsibility.
- ensure adherence to good safety procedures.
- participate in professional growth activities and complete a professional development plan.
- attend professional conferences and workshops related to the overall guidance program.
- perform other duties as assigned by the Principal.
- follow School, Board, and Sponsor policies as well as federal and state laws

JOB DESCRIPTION

POSITION TITLE: English Language Learner (ELL) Specialist/Teacher

CONTRACT YEAR: Ten (10) Months - Annual Contract

QUALIFICATIONS

EDUCATION: An earned bachelor's degree or higher from an accredited institution and Appropriate State of Florida Teaching Certification Endorsement in ESOL

EXPERIENCE

REQUIRED: A minimum of four (4) years of combined successful work experience, which includes a minimum of two (2) years teaching experience in ESOL/bilingual education.

PREFERRED: Preferred degree major in Education or related field. Bilingual in English, Spanish and/or Creole preferred. Computer skills as required for the position.

SUPERVISES: ESOL Teachers, teachers and clerical personnel, as assigned.

POSITION GOAL: To develop, implement, coordinate and monitor ESOL curriculum for students assigned to the ESOL program.

ESSENTIAL PERFORMANCE RESPONSIBILITIES: The ESOL Coordinator/teacher shall:

- Coordinate the development of bilingual/ESOL curriculum guides and performance objectives for grades all grades at the school.
- Coordinate the identification, assessment and placement of students in the bilingual/ESOL program.
- Coordinate the ordering of materials and equipment needed to implement the bilingual/ESOL program.
- Develop and assist to implement the school's bilingual/ESOL program.
- Coordinate and attend LEP meetings and communicate with parents.
- Coordinate testing for ESOL and monitor student LEPS
- Work with principals, teachers and personnel in the bilingual/ESOL program.
- Coordinate the internal and external evaluation to maintain an effective feedback monitoring system in coordination with Program Evaluation.
- Coordinate activities with early intervention programs to provide services for English Language Learners (ELLs).
- Serve as a consultant on the matters pertinent to the bilingual/ESOL program.

- Assist with interviews of potential bilingual/ESOL teachers.
- Participate successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment.
- Review current developments, literature and technical sources of information related to job responsibility.
- Ensure adherence to good safety procedures.
- Perform other duties as assigned by the Principal.

Job Descriptions

POSITION TITLE: Exceptional Student Education (ESE) Program Specialist

CONTRACT YEAR: Ten Months

QUALIFICATIONS

EDUCATION: Bachelor's degree in Education. Master's degree preferred. Must have certification in Exceptional Student Education areas.

EXPERIENCE

REQUIRED: Must possess and maintain current Teaching Certification in Exceptional Student Education. Minimum of five (5) years of successful instructional experience in Exceptional Student Education.

REPORTS TO: School Principal

SUPERVISES: Special Education Teacher, teachers and clerical personnel, as assigned.

POSITION GOAL: The Specialist will conduct staff development activities designed to ensure a free and appropriate public education for all students with disabilities. This position will also assist the School Administrator and Program Specialists in managing all ESE functions within the schools and will ensure compliance in all areas of ESE.

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

The ESE Specialist shall:

- Coordinates the referral, staffing, placement and re-evaluation process for exceptional student education at the school level, i.e., initials, IEP reviews, transfers, verification of placements.
- Directs the use of all forms at the school level including referral and placement forms, IEP's, data entry, FTE, etc., in preparation for staffing's/meetings.
- Maintains records and procedures specific to Exceptional Student Education for compliance purposes.
- Serves as LEA (Local Education Agency) Representative at the Speech and Language staffing's and IEP meetings.

- Acts as a resource to the school personnel regarding ESE rules, regulations, compliance requirements, program needs, school responsibilities, positive behavioral supports, discipline concerns, functional behavior assessments, behavior intervention plans, and other ESE related concerns including implementation of Individuals with Disabilities Education Act.
- Assists schools in implementing all processes required for the FTE survey weeks and the federal count.
- Provides periodic monitoring of Matrices, IEPs, re-evaluation dates and any other date specific requirements to ensure compliance for audit surveys.
- Collaborates with school personnel and others for the development, coordination and implementation of appropriate staff development, e.g., workshops, updates, in-service, conferences, etc.
- Instructs exceptional students education in a designated curriculum area one period/subject per day or mentors daily in at least one period or subject to an ESE teacher.
- Prepares and submits appropriate comprehensive written reports that include interpretation and synthesis of assessment data and other sources data upon request.
- Assesses, in conjunction with ESE Program Specialist, the needs of school-based ESE teachers and programs.
- Mentors and demonstrates effective teaching strategies to ESE teachers.
- Assists schools in the decision-making process required for determining accommodations for students with disabilities participating in standard or alternative assessment.
- Serves as liaison between school personnel, i.e., the guidance department, the administrators and the ESE staff.
- Develops and implements activities promoting inclusive practices.
- Attends workshops, conferences and meetings necessary to maintain and update professional knowledge.

Job Descriptions

POSITION TITLE: Reading/Literacy Coach

CONTRACT YEAR: Ten Months

QUALIFICATIONS

EDUCATION: Bachelor's degree from an accredited educational institution and advanced coursework or professional development in reading is required.

EXPERIENCE

REQUIRED: Must be endorsed or K-12 certified in the area of reading, or working toward that status by completing a minimum of two (2) reading endorsement competencies of sixty (60) in-service hours each or six (6) semester hours of college coursework in reading per year.

REPORTS TO: Principal

SUPERVISES: None

POSITION GOAL: The reading/literacy coach will serve as a stable resource for professional development throughout a school to generate improvement in reading and literacy instruction and student achievement. Coaches will support and provide initial and ongoing professional development to teachers.

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

The Reading/Literacy Coach shall:

- Each of the major reading components, as needed, based on an analysis of student performance data.
- Administration and analysis of instructional assessments.
- Providing differentiated instruction and intensive intervention.
- Model effective instructional strategies for teachers; Facilitate study groups; Train teachers in data analysis and using data to differentiate instruction.
- Coach and mentor colleagues and provide daily support to classroom teachers.

- Work with teachers to ensure that research-based reading programs (comprehensive core reading programs, supplemental reading programs and comprehensive intervention reading programs) are implemented with fidelity.
- Help to increase instructional density to meet the needs of all students;
- Help lead and support reading leadership teams at their school(s);
- Continue to increase their knowledge base in best practices in reading instruction, intervention, and instructional reading strategies;
- Work with all teachers (including ESE, content area, and elective areas) in the school they serve, prioritizing their time to those teachers, activities, and roles that will have the greatest impact on student achievement, namely coaching and mentoring in classrooms;
- Work frequently with students in whole and small group instruction in the context of modeling and coaching in other teachers' classrooms;
- Not be asked to perform administrative functions that will confuse their role for teachers; and spend limited time administering or coordinating assessments.
- While the reading coach must not be assigned a regular classroom teaching assignment, they are expected to work frequently with students in whole and small group instruction in the context of modeling and coaching in other teachers' classrooms.

JOB DESCRIPTION

POSITION TITLE: Registrar

CONTRACT YEAR: Twelve Months

QUALIFICATIONS

EDUCATION: Standard high school diploma or satisfactory completion of an approved General Educational Development (GED) Testing Program.

SKILLS: A well-rounded knowledge of clerical methods, procedures, and business office practice; must be computer literate. Computer skills as required for the position. The hiring administrator may specify preferred, appropriate additional qualifications as may be related to the job.

EXPERIENCE: One (1) year of previous school work experience which demonstrated an expertise to perform various procedures and applications of a repetitive and routine nature following standard practices.

REPORTS TO: Administrator/Principal or designee

POSITION GOAL: To perform a wide variety of clerical duties with respect to registering students, processing and maintaining student records, and otherwise working with student schedules and data in a responsible and accurate manner.

ESSENTIAL PERFORMANCE RESPONSIBILITIES: The School Registrar shall:

- Process required forms and information to enroll new students and discuss the process with students and parents.
- Maintain cumulative folders and permanent record cards in a secure manner.
- Prepare various lists and reports in regard to student ranking, grade averages, graduation, reassignments, etc.
- Process withdrawal and transfer of students and verify that student obligations are settled.
- Assist in determining credits and corresponding grade levels.
- Receive and mail transcripts and other requested records, as authorized, and prepare related correspondence.
- Follow instructions and established policies and procedures to perform specialized registrar duties referring questionable matters to the Guidance Director.

- Review students' immunization forms to verify adherence to governmental requirements.
- Operate standard office equipment such as any generation of typewriter, calculator, microcomputer, word processor, etc., as well as equipment developed or advanced from future technology as required by the job.
- Interact effectively with the general public, staff members, students, teachers, parents, and administrators, using tact and good judgment.
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment.
- Review current developments, literature and technical sources of information related to job responsibility.
- Ensure adherence to good safety procedures.
- Perform other duties as assigned by the Principal or designee.

SAMPLE CHARTER SCHOOL, INC. Parent/Guardian Contract

I, the undersigned parent/guardian of _____, hereby agree to abide by the following policies and procedures of _____.

- **Absences:** In accordance with School and DISTRICT Daily Attendance Policies, students must be physically present in school for a minimum of 2 hours in order to be counted as present for attendance purposes each day. For each day a student is absent, Parents/guardians must submit supporting documentation explaining the reason for the absence. Documentation submitted more than 3 days (72 hours) after the student's return to school will not be accepted, and the absence(s) will be deemed unexcused. Students with excessive absences will be referred to the administration/Attendance Review Committee. Referrals will be issued after reaching the school's maximum allowance, and may result in the student's report card reflecting insufficient attendance for receiving a grade. Please be advised: for students in grades 9-12, five (5) or more unexcused absences in a semester course or ten (10) or more in an annual course, may result in the withholding of a student's grade.
- **Arrival:** Arrival time is from _____ am to _____ am. Students must be in their seats at the commencement of homeroom in the morning. Any student arriving after the commencement of homeroom will receive a tardy pass. Students arriving outside of the School's designated times may be enrolled in a before-care program, where available, including all applicable fees. Please be advised: SAMPLE CHARTER SCHOOL is not responsible for students who arrive more than thirty (30) minutes prior to the start of school, except for those who are enrolled in and pay fees to the before-care program.
- **Tardies:** All tardies are unexcused. If students arrive after the commencement of school, please do not send the student to class. Students arriving after the commencement of school must report directly to the School's designated office or area. Students with excessive tardies will be referred to the administration/Attendance Review Committee.
- **Dismissal:** Dismissal time is _____ pm. Students departing outside of the School's designated times may be enrolled in an after-care program, where available, including all applicable fees. Please be aware that all charges must be resolved in full by the last day of school. Please be advised that SAMPLE CHARTER SCHOOL is not responsible for students remaining on campus after the School's dismissal times, except for those who are enrolled in and pay fees to the after-care program.
- **Early Dismissal:** For a student to be dismissed early, parents must report to the designated office/area. Students with excessive unexcused early dismissals, will be referred to the administration/Attendance Review Committee. Students will not be dismissed 30 minutes prior to dismissal time without previous written notice. There are NO EXCEPTIONS!
- **Unauthorized Items Policy:** Please note that students are not allowed to bring any illegal or unauthorized items to school, including but not limited to: toys, unauthorized/unapproved electronic devices, pets, animals, or any other object otherwise inappropriate for the educational environment. The School will confiscate any unauthorized items a student may bring to school. Confiscated items will only be returned to parents at which time a parent/student conference may be required. The school may keep any such unauthorized items until the end of the school year. Violations of this policy will be addressed through the student code of conduct, may result in further penalties, and may subject the student to disciplinary action and/or referral to the School's administration/discipline review committee. While the School will take every measure to protect such items, the School shall not be responsible for loss or damage to any unauthorized items which have been confiscated. Any items not claimed by the last day of school shall be disposed of without further liability to the School.
- **Uniform Policy:** Official School uniforms must be worn every day. Students who arrive to school without proper uniform may be referred to the administration and may not return to class until in proper uniform. Students with repeated violations of this policy will be referred to the administration/Discipline Review Committee.
- **Volunteer Hours:** Parental/Guardian involvement is a critical component of your child's educational success. SAMPLE CHARTER SCHOOL prides itself on the success of our students and therefore requires that parents/guardians become active stakeholders in their child's future. All SAMPLE CHARTER SCHOOL parents/guardians are asked to complete thirty (30) volunteer hours, or the

equivalent, per academic year. All parent/guardian volunteer hours must be completed prior to the last day of school.

- **Academic Recovery:** If the School identifies your student as requiring additional instruction and/or remediation including but not limited to: mandatory tutoring, summer school, etc., attendance at and successful completion of same shall be required. Alternative and/or make-up sessions may be scheduled at the discretion of the administration.
- **Outstanding Fees:** Failure to pay all outstanding fees may result in the loss and/or suspension of extra-curricular activity privileges. Fees may include but shall not be limited to: lost books, late library fees, lunch accounts, before/after care fees, and any and all fees which may accrue in the normal course of the school year.
- **Internet and Media Use Policy:** No recording, either photographic or audio/visual in nature may be made on school property without the express authorization of the administration. No document or media existing now or in the future and which impacts the School and/or disrupts the learning environment, relating to the School, its staff or students, including but not limited to photographs, letters, yearbooks, and other material may be published in any public forum or media without the express authorization of the administration. Furthermore, the unauthorized use of the SAMPLE CHARTER SCHOOL name and/or any of its logos is expressly prohibited. For purposes of this section, the term "public forum or media includes but shall not be limited to publicly accessible websites and web forums, newspapers, print and other media sources.
- **DISTRICT County Public Schools:** Please note: all charter schools in Florida are public schools, and students enrolled in SAMPLE CHARTER SCHOOL are public school students, subject to those applicable policies of DISTRICT County Public Schools.

We understand the policies set forth in this SAMPLE CHARTER SCHOOL Parent/Guardian Contract and agree to abide by them. Failure to adhere to any of the policies as stated in the Parent/Guardian Contract will be considered a violation of this contract.

Student's Name: _____
Grade: _____ Date: _____
Parent Name: _____

X

Parent Signature

Start-up Budget

	February	March	April	May	June	Total
Amount of Credit / Grant **						
EXPENSES:						
Administration Staff	500	500	500	500	500	2,500
Marketing & Enrollment		2,500		2,000		4,500
Computer/Printer	1,500					1,500
Administrative Expenses	500	200	100	100	100	1,100
TOTAL OPERATING EXPENSES	4,500	6,200	5,600	5,600	5,100	25,000
End Balance	20,500	14,300	10,700	5,100		

The School will apply for a \$25,000 planning and design grant, as provided by the Charter School Implementation Grant Program. If awarded, the grant will assist the school with the start-up costs which will be incurred prior to the period when the school will begin to receive operational funding from the sponsor. In the event that the start-up grant is not awarded, the school can either use resources from its work or has identified a non-profit charter school lender that will provide a line of credit to support the opening expenditures.

Somerset Treasure Coast - 6-8

	Year 1	Year 2	Year 3	Year 4	Year 5
Grades	6-8	6-8	6-8	6-8	6-8
Students per grade (average)	78	100	100	100	100
Total # Students	235	300	300	300	300
Per Student Revenue *	6,137	6,257	6,382	6,510	6,640
		2.0%	2.0%	2.0%	2.0%

REVENUE

Maximum Gross Revenue (\$)	1,485,143	1,927,175	1,965,718	2,005,033	2,045,133
Enrollment Contingency (\$)	42,959	50,056	51,058	52,079	53,120
Budgeted State Sources of Revenue (\$)	1,442,184	1,877,118	1,914,661	1,952,954	1,992,013

EXPENDITURES

Facility Budget					
Maximum Facility Expense	293,170	408,004	418,945	430,189	441,743
Minimum Building Size Utilized (Sqft)	12,925	15,600	15,600	15,600	15,600
Cost per Student	\$ 900.00	\$ 927.00	\$ 954.81	\$ 983.45	\$ 1,012.96
Operating and Fixed Costs	81,670	129,904	132,502	135,152	137,855
Mortgage Payments/Rent	211,500	278,100	286,443	295,036	303,887

Teacher Staffing Budget					
Average Class Size	21	21	21	21	21
# of Teachers	11	14	14	14	14
Salary Benefits per Teacher	9,062	9,244	9,428	9,617	9,809

MAXIMUM FOR OTHER EXPENDITURES	867,843	1,227,812	1,197,853	1,221,812	1,246,336
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* See All Charter School Calculator for Assumptions for the calculation of per pupil FTE

			\$ 1,442,184.00	\$ 1,086,240.71	\$ 721,092.00	\$ 1,927,174.73	\$
	\$ 2.98	60%				\$ 98,483.04	\$
	\$ 3.00	30%				\$ 49,572.00	\$
ed)	\$ 215.00	Per Student	\$ 50,525.00	\$ 38,055.00	\$ 25,370.00	\$ 64,500.00	\$
			\$ 23,500.00	\$ 17,700.00	\$ 11,800.00	\$ 30,000.00	\$
			\$ 1,516,209.00	\$ 1,141,995.71	\$ 758,262.00	\$ 2,169,729.77	\$
\$							
arly, and teacher aides)	See Staffing Plan		\$ 453,117.50	\$ 329,540.00	\$ 226,558.75	\$ 588,228.90	\$
			\$ 99,685.85	\$ 72,498.80	\$ 49,842.93	\$ 129,410.36	\$
& other contracted instructional services)	\$ 450.00	ESE Student	\$ 12,150.00	\$ 9,450.00	\$ 6,300.00	\$ 15,606.00	\$
	\$ 45.00	Student	\$ 10,575.00	\$ 7,965.00	\$ 5,310.00	\$ 13,770.00	\$
	\$ 35.00	Student	\$ 8,225.00	\$ 6,195.00	\$ 4,130.00	\$ 10,710.00	\$
	\$ 185.00	Student	\$ 43,475.00	\$ 32,745.00	\$ 21,830.00	\$ 56,610.00	\$
echnology)	\$ 75.00	Student	\$ 17,625.00	\$ 13,275.00	\$ 8,850.00	\$ 22,950.00	\$
	\$ 150.00	Student	\$ 35,250.00	\$ 26,550.00	\$ 17,700.00	\$ 45,900.00	\$
	\$ 1,500.00	Classroom	\$ 16,500.00	\$ 12,000.00	\$ 9,000.00	\$ 21,420.00	\$
			\$ 696,603.35	\$ 510,218.80	\$ 357,021.68	\$ 904,605.26	\$
stant)	See Staffing Plan		\$ 21,000.00	\$ 21,000.00	\$ 10,500.00	\$ 21,420.00	\$
			\$ 4,620.00	\$ 4,620.00	\$ 2,310.00	\$ 4,712.40	\$
chological)	\$ 850.00	ESE Student	\$ 22,950.00	\$ 17,850.00	\$ 11,900.00	\$ 29,478.00	\$
			\$ 48,570.00	\$ 43,470.00	\$ 24,710.00	\$ 55,610.40	\$
			\$ -	\$ -	\$ -	\$ -	\$
			\$ -	\$ -	\$ -	\$ -	\$
			\$ -	\$ -	\$ -	\$ -	\$
			\$ -	\$ -	\$ -	\$ -	\$
valuation (part of ESP's Fee)	\$ 115.00	Student	\$ 27,025.00	\$ 20,355.00	\$ 13,570.00	\$ 35,190.00	\$
	\$ 15.00	Student	\$ 3,525.00	\$ 2,655.00	\$ 1,770.00	\$ 4,590.00	\$
			\$ 30,550.00	\$ 23,010.00	\$ 15,340.00	\$ 39,780.00	\$

	\$ 400.00	Classroom	\$ 4,400.00	\$ 3,200.00	\$ 2,400.00	\$ 5,712.00	\$
			\$ 5,600.00	\$ 4,400.00	\$ 3,600.00	\$ 6,936.00	\$
	\$ 2,500.00	School	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,550.00	\$
ty)	\$ 850.00	Classroom	\$ 9,350.00	\$ 6,800.00	\$ 5,100.00	\$ 12,138.00	\$
	\$ 2,000.00	Board Mem	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,040.00	\$
			\$ 13,850.00	\$ 11,300.00	\$ 9,600.00	\$ 16,728.00	\$
py ESP)	\$ 225.00	Student	\$ 52,875.00	\$ 39,825.00	\$ 26,550.00	\$ 68,850.00	\$
			\$ 52,875.00	\$ 39,825.00	\$ 26,550.00	\$ 68,850.00	\$
Personnel)			\$ 54,000.00	\$ 42,500.00	\$ 21,250.00	\$ 110,160.00	\$
			\$ 11,880.00	\$ 9,350.00	\$ 4,675.00	\$ 24,235.20	\$
	\$ 300.00	Per Month	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,672.00	\$
	\$ 1,200.00	Administrator	\$ 600.00	\$ 600.00	\$ 600.00	\$ 612.00	\$
	\$ 5.00	Student	\$ 1,175.00	\$ 885.00	\$ 590.00	\$ 1,530.00	\$
	\$ 200.00		\$ 200.00	\$ 200.00	\$ 200.00	\$ 204.00	\$
	\$ 4.00	Student	\$ 940.00	\$ 708.00	\$ 472.00	\$ 1,224.00	\$
	\$ 50.00	Classroom	\$ 550.00	\$ 400.00	\$ 300.00	\$ 714.00	\$
	\$ 225.00	Classroom	\$ 2,475.00	\$ 1,800.00	\$ 1,350.00	\$ 3,213.00	\$
	\$ 25.00	Student	\$ 5,875.00	\$ 4,425.00	\$ 2,950.00	\$ 7,500.00	\$
	\$ 1,500.00		\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ 1,530.00	\$
	\$ 1,000.00	Administrator	\$ 500.00	\$ 500.00	\$ 500.00	\$ 510.00	\$
			\$ 83,295.00	\$ 66,468.00	\$ 37,987.00	\$ 155,104.20	\$
ation)			\$ 211,500.00	\$ 159,300.00	\$ 105,750.00	\$ 278,100.00	\$
			\$ 211,500.00	\$ 159,300.00	\$ 105,750.00	\$ 278,100.00	\$
ng Personnel)			\$ -	\$ -	\$ -	\$ -	\$
			\$ -	\$ -	\$ -	\$ -	\$
			\$ 72,109.20	\$ 54,312.04	\$ 36,208.02	\$ 78,213.26	\$
t of ESP's Fee)	\$ 110.00		\$ 25,850.00	\$ 19,470.00	\$ 12,980.00	\$ 33,660.00	\$
	\$ 8,500.00		\$ 8,500.00	\$ 8,500.00	\$ 8,500.00	\$ 8,670.00	\$

or day 40% utilization	\$ 265.00	40%	\$ 95,400.00	\$ 95,400.00	\$ 47,700.00	\$ 95,400.00	\$
			\$ 95,400.00	\$ 97,900.00	\$ 50,200.00	\$ 95,400.00	\$
	See Staffing		\$ -	\$ -	\$ -	\$ 21,216.82	\$
			\$ -	\$ -	\$ -	\$ 4,667.70	\$
	\$ 2,500.00	Per Classroom	\$ 27,500.00	\$ 20,000.00	\$ 15,000.00	\$ 35,700.00	\$
	\$ 200.00	Per Classroom	\$ 2,200.00	\$ 1,600.00	\$ 1,200.00	\$ 2,856.00	\$
	\$ 40.00	Per Classroom	\$ 440.00	\$ 320.00	\$ 240.00	\$ 571.20	\$
	\$ 300.00	Per Month	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,672.00	\$
	\$ 1,750.00	Per Classroom	\$ 19,250.00	\$ 14,000.00	\$ 10,500.00	\$ 24,990.00	\$
	\$ 300.00	Per Month	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,672.00	\$
	\$ 80.00	Per Classroom	\$ 880.00	\$ 640.00	\$ 480.00	\$ 1,142.40	\$
	\$ 2,200.00	Per Classroom	\$ 24,200.00	\$ 17,600.00	\$ 13,200.00	\$ 31,416.00	\$
			\$ 81,670.00	\$ 61,360.00	\$ 47,820.00	\$ 129,904.12	\$
	\$ 1.50	Sq. Ft.	\$ 19,387.50	\$ 9,204.00	\$ 3,055.00	\$ 23,400.00	\$
			\$ 19,387.50	\$ 9,204.00	\$ 3,055.00	\$ 23,400.00	\$
	\$ 750.00	Per Classroom	\$ 8,250.00	\$ 6,000.00	\$ 4,500.00	\$ 10,710.00	\$
			\$ 8,250.00	\$ 6,000.00	\$ 4,500.00	\$ 10,710.00	\$
			\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ 25,000.00	\$
			\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ 25,000.00	\$
ed restricted funds	3%		\$ 45,486.27	\$ 17,129.94	\$ 4,549.57	\$ 65,091.89	\$
			\$ 45,486.27	\$ 17,129.94	\$ 4,549.57	\$ 65,091.89	\$
res			\$ 1,512,146.32	\$ 1,141,517.77	\$ 755,521.27	\$ 2,149,284.85	\$
Expenditures			\$ 4,062.68	\$ 477.94	\$ 2,740.73	\$ 20,444.92	\$

\$	150.00	Student	Digital content material as described in the curriculum section. The materials would be funded over time. Expenditure listed is for the annual costs.
\$	1,500.00	Classroom	Computer equipment to be utilized in the classroom. The expenditure outlined is the annual cost to lease the equipment on a three lease. If the school receives a CSP grant the equipment would be purchased
See Staffing Plan			Salaries in the staffing plan are for Full Time Equivalent (FTE) positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan. As calculated in the staffing plan
\$	850.00	ESE Student	Contracted instructional support services as outlined in the application (eg. ESE Specialist, counselor)
			Salaries in the staffing plan are for Full Time Equivalent (FTE) media service positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan. As calculated in the staffing plan
\$	115.00	Student	Salaries in the staffing plan are for Full Time Equivalent (FTE) curriculum positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan. As calculated in the staffing plan
\$	15.00	Student	The services provided in the ESP's \$450 per student fee for Curriculum Planning, Research, Development and Evaluation - The amount stated is a component of the ESP fee
\$	1,000.00	Teacher	The costs associated with providing staff development as described in the application
\$	1,200.00	School	The costs associated with maintaining the computer hardware. This amount is paid to outside contractors.
\$	400.00	Classroom	

	0		
			N/A
\$	265.00	40%	The cost for providing busing. The percentage of students that will be utilizing busing. The cost is per bus per day based on a 65 student capacity bus
See Staffing			Salaries in the staffing plan are for Full Time Equivalent (FTE) Operation of Plant positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan. As calculated in the staffing plan The costs for contracted custodial services and other contracted service for the operation of the facility
\$	2,500.00	Per Classroom	Contracted lawn service
\$	200.00	Per Classroom	Contracted pest service
\$	40.00	Per Classroom	Contracted security alarm monitoring
\$	300.00	Per Month	The expenditure for property insurance including windstorm
\$	1,750.00	Per Classroom	Monthly phone service expenses
\$	300.00	Per Month	City Water & Sewer costs
\$	80.00	Per Classroom	The costs electrical service
\$	2,200.00	Per Classroom	
\$	1.50	Sq. Ft.	Repairs & Maintained of the facility
\$	-		
\$	750.00	Per Classroom	Contracted costs to maintain the IT infrastructure
\$	-		
	0		Repayment of start up loan
	0		Interest on start up loan
	0		
	3%		

Somerset Treasure Coast - 6-8**Asset, Liability, and Fund Balance**

Projections	Planning Year	Year 1	Year 2	Year 3	Year 4	Year 5
Assets						
Cash	-	74,549	160,086	273,246	386,722	500,432
Fixed Assets	-					
Total Assets	-	74,549	160,086	273,246	386,722	500,432
Liabilities						
Current Liabilites	-	-	-	-	-	-
Notes Payable	25,000	-	-	-	-	-
Total Liabilities	25,000	-	-	-	-	-
Fund Balance						
Restricted Contingency	-	45,486	110,578	176,915	244,522	313,425
Unrestricted	(25,000)	4,063	49,508	96,331	142,199	187,007
Net Fund Balance	(25,000)	49,549	160,086	273,246	386,722	500,432

	42,000	0.50	0.50	0.25	0.50	1.00	1.00	1.00
		0.50	0.50	0.25	0.50	1.00	1.00	1.00
	41,000							
	41,000							
	85,000	0.50	0.50	0.25	1.00	1.00	1.00	1.00
	65,000							
	28,081							
	23,000	0.50			1.00	1.00	1.00	1.00
	19,000							
	220,081	1.00	0.50	0.25	2	2	2	2
	40,000							
	40,000							
	14,000					1	1	1
	14,000					1	1	1
	20,801					1	1	1
	20,801							
	41,602	-	-	-	1	1	1	1
		13	9	6	19	19	19	19
	2.0%							
		434,500	316,000	217,250	564,060	575,341	586,848	598,585
		12,100	8,800	6,050	15,708	16,022	16,343	16,669
ches)		-	-	-	-	-	-	-
		-	-	-	-	-	-	-
		6,518	4,740	3,259	8,461	8,630	8,803	8,979
		453,118	329,540	226,559	588,229	599,993	611,993	624,233
Benefits:		99,686	72,499	49,843	129,410	131,999	134,639	137,331
		21,000	21,000	10,500	21,420	43,697	44,571	45,462
		21,000	21,000	10,500	21,420	43,697	44,571	45,462
Benefits:		4,620	4,620	2,310	4,712	9,613	9,806	10,002
		-	-	-	-	-	-	-
Benefits:		-	-	-	-	-	-	-
		42,500	42,500	21,250	86,700	88,434	90,203	92,007
		-	-	-	-	-	-	-
		-	-	-	-	-	-	-
		11,500	-	-	23,460	23,929	24,408	24,896
		-	-	-	-	-	-	-
		54,000	42,500	21,250	110,160	112,363	114,610	116,903
Benefits:		11,880	9,350	4,675	24,235	24,720	25,214	25,719
		-	-	-	-	-	-	-
Benefits:		-	-	-	-	-	-	-
		-	-	-	-	-	-	-
Benefits:		-	-	-	-	-	-	-
		-	-	-	14,280	14,566	14,857	15,164

2nd Grade					
3rd Grade					
4th Grade	5	5	4	5	5
5th Grade	4	5	5	4	5
6th Grade	2	4	5	5	4
7th Grade					
8th Grade					
9th Grade					
10th Grade					
11th Grade					
12th Grade					
	11	14	14	14	14

	Year 1	Year 2	Year 3	Year 4	Year 5
Kindergarten	0	0	0	0	0
1st Grade	0	0	0	0	0
2nd Grade	0	0	0	0	0
3rd Grade	0	0	0	0	0
4th Grade	0	0	0	0	0
5th Grade	0	0	0	0	0
6th Grade	22	22	22	22	22
7th Grade	22	22	22	22	22
8th Grade	22	22	22	22	22
9th Grade	0	0	0	0	0
10th Grade	0	0	0	0	0
11th Grade	0	0	0	0	0
12th Grade	0	0	0	0	0

0 242 308 308 308 308

ment

	Year 1	Year 2	Year 3	Year 4	Year 5
Kindergarten	0	0	0	0	0
1st Grade	0	0	0	0	0
2nd Grade	0	0	0	0	0
3rd Grade	0	0	0	0	0
4th Grade	0	0	0	0	0
5th Grade	0	0	0	0	0
6th Grade	107	107	86	107	107
7th Grade	86	107	107	86	107
8th Grade	45	86	107	107	86
9th Grade	0	0	0	0	0
10th Grade	0	0	0	0	0
11th Grade	0	0	0	0	0
12th Grade	0	0	0	0	0
	235	300	300	300	300

Grade Matrix

Location: Level Level FTE

Funding from the K-3 251 []

				7,167	7,167	7,167	7,167	7,167	7,167
				3,333	3,333	3,333	3,333	3,333	3,333
	4,063								
	164,661	160,598	175,403	185,903	185,903	185,903	185,903	185,903	185,903
er aides)		26,738	56,149	56,149	56,149	56,149	56,149	56,149	56,149
		5,882	12,353	12,353	12,353	12,353	12,353	12,353	12,353
ected instructional services)				1,734	1,734	1,734	1,734	1,734	1,734
		4,544	4,544	4,682					
		3,534	3,534	3,641					
		18,681	18,681	19,247					
		7,574	7,574	7,803					
		7,069	7,069	7,283					
		-	-	-					
	-	74,022	109,904	112,892	70,236	70,236	70,236	70,236	70,236
			2,142	2,142	2,142	2,142	2,142	2,142	2,142
			471	471	471	471	471	471	471
			2,948	2,948	2,948	2,948	2,948	2,948	2,948
	-	-	5,561	5,561	5,561	5,561	5,561	5,561	5,561
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
ESP's Fee)	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933
		-	-	-	-	-	-	-	-
		2,295	2,295						
	2,933	5,228	5,228	2,933	2,933	2,933	2,933	2,933	2,933

	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738
	-	-	-	-	-	-	-	-	-	-
	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738
	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180
	2,020	2,020	2,020	2,020	2,020	2,020	2,020	2,020	2,020	2,020
	306	306	306	306	306	306	306	306	306	306
				612						
	510	510	510							
	204									
	1,224									
			71	71	71	71	71	71	71	71
	1,607	146	146	146	146	146	146	146	146	146
	1,875	511	511	511	511	511	511	511	511	511
	1,530									
	510									
	18,965	12,673	12,744	12,846	12,234	12,234	12,234	12,234	12,234	12,234
		25,282	25,282	25,282	25,282	25,282	25,282	25,282	25,282	25,282
	-									
	-									
	-									
	-	25,282	25,282	25,282	25,282	25,282	25,282	25,282	25,282	25,282
	-									
	-									
	6,518	6,518	6,518	6,518	6,518	6,518	6,518	6,518	6,518	6,518
	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805
	723	723	723	723	723	723	723	723	723	723
	10,045	10,045	10,045	10,045	10,045	10,045	10,045	10,045	10,045	10,045
			1,428	1,428	1,428	1,428	1,428	1,428	1,428	1,428
			314	314	314	314	314	314	314	314
			-	-	-	-	-	-	-	-
			12,195	12,195	12,195	12,195	12,195	12,195	12,195	12,195
			-	-	-	-	-	-	-	-

				7,167	7,167	7,167	7,167	7,167	7,167
				3,333	3,333	3,333	3,333	3,333	3,333
	24,508								
	188,317	163,810	178,911	189,411	189,411	189,411	189,411	189,411	189,411
er aides)		27,272	57,272	57,272	57,272	57,272	57,272	57,272	57,272
ected instructional services)		6,000	12,600	12,600	12,600	12,600	12,600	12,600	12,600
				1,769	1,769	1,769	1,769	1,769	1,769
		4,635	4,635	4,775					
		3,605	3,605	3,714					
		9,527	9,527	9,816					
		7,725	7,725	7,959					
		7,210	7,210	7,428					
		-	-	-					
	-	65,975	102,574	105,334	71,641	71,641	71,641	71,641	71,641
			4,370	4,370	4,370	4,370	4,370	4,370	4,370
			961	961	961	961	961	961	961
			3,001	3,001	3,001	3,001	3,001	3,001	3,001
	-	-	8,332	8,332	8,332	8,332	8,332	8,332	8,332
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
f ESP's Fee)	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991
		-	-	-	-	-	-	-	-
		2,341	2,341						
	2,991	5,332	5,332	2,991	2,991	2,991	2,991	2,991	2,991

	71,331								
	238,417	167,086	182,490	192,990	192,990	192,990	192,990	192,990	192,990
		27,818	58,418	58,418	58,418	58,418	58,418	58,418	58,418
		6,120	12,852	12,852	12,852	12,852	12,852	12,852	12,852
				1,804	1,804	1,804	1,804	1,804	1,804
		4,728	4,728	4,871					
		3,677	3,677	3,789					
		9,718	9,718	10,012					
		7,879	7,879	8,118					
		7,354	7,354	7,577					
		-	-	-					
	-	67,294	104,626	107,441	73,073	73,073	73,073	73,073	73,073
			4,457	4,457	4,457	4,457	4,457	4,457	4,457
			981	981	981	981	981	981	981
			3,061	3,061	3,061	3,061	3,061	3,061	3,061
	-	-	8,498	8,498	8,498	8,498	8,498	8,498	8,498
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-
	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051
		-	-	-	-	-	-	-	-
		2,388	2,388						
	3,051	5,439	5,439	3,051	3,051	3,051	3,051	3,051	3,051
		7,000							7,000

functional services)

)

(1)	(2)	(3)	(4)
c K-3	0.00	1.115	0.0000 \$
c K-3 with ESE Services	0.00	1.115	0.0000 \$
c 4-8	189.00	1.000	189.0000 \$
c 4-8 with ESE Services	27.00	1.000	27.0000 \$
c 9-12	0.00	1.005	0.0000 \$
c 9-12 with ESE Services	0.00	1.005	0.0000 \$
Level 4 (Grade Level PK-3)		3.613	0.0000 \$
Level 4 (Grade Level 4-8)		3.613	0.0000 \$
Level 4 (Grade Level 9-12)		3.613	0.0000 \$
Level 5 (Grade Level PK-3)		5.258	0.0000 \$
Level 5 (Grade Level 4-8)		5.258	0.0000 \$
Level 5 (Grade Level 9-12)		5.258	0.0000 \$
L (Grade Level PK-3)	0.00	1.180	0.0000 \$
L (Grade Level 4-8)	19.00	1.180	22.4200 \$
L (Grade Level 9-12)	0.00	1.180	0.0000 \$
eer Education (Grades 9-12)		1.005	0.0000 \$
Totals	235.00		238.4200 \$

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

201

FE (a)	Number of FTE	Base (WFTE)
ed Placement		\$
ional Baccalaureate		\$
ed International Certificate		\$
ertified Career Education		\$
gh School Graduation		\$
strict ESE Supplement		\$
Total Additional FTE	0.0000	Additional Base Funds \$
Total Funded Weighted FTE	238.4200	Total Base Funding \$

Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student
	0.00	PK-3	251	\$ 978 \$
		PK-3	252	\$ 3,158 \$
		PK-3	253	\$ 6,444 \$
	27.00	4-8	251	\$ 1,097 \$
		4-8	252	\$ 3,277 \$
		4-8	253	\$ 6,563 \$
	0.00	9-12	251	\$ 780 \$
		9-12	252	\$ 2,960 \$
		9-12	253	\$ 6,247 \$
Total FTE with ESE Services	27.00			Total ESE Guarantee \$

Applications Allocation:

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

Enrollment (WFTE share)	(c)	<u>72,509</u>	x	<u>0.5763%</u>	<u>\$</u>
Supplement (WFTE share)	(c)	<u>0</u>	x	<u>0.5763%</u>	<u>\$</u>
Charter Local Effort (WFTE share)	(c)	<u>13,128,277</u>	x	<u>0.5763%</u>	<u>\$</u>
Charter to Funds Available (WFTE share)	(c)	<u>0</u>	x	<u>0.5763%</u>	<u>\$</u>
Charter Lottery (WFTE share)	(c)	<u>135,951</u>	x	<u>0.5763%</u>	<u>\$</u>

Class Size Reduction Funds:

Weighted FTE (not including Add-On)	X	DCD	X	Allocation factors	=	
0.0000		0.9955		1,313.27	=	<u>0</u>
238.4200		0.9955		895.79	=	<u>212,613</u>
0.0000		0.9955		897.95	=	<u>0</u>
238.4200				Total Class Size Reduction Funds		\$

Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

Transportation

Enter All Adjusted Fundable Riders	(f)	<u>94</u>	x	<u>365</u>	<u>\$</u>
Enter All Adjusted ESE Riders			x	<u>1,369</u>	<u>\$</u>

Connected Student Supplement (g)

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
Land and Indian Lands		\$0.00	\$0.00	<u>\$</u>
Charter on Federal Lands		\$0.00	\$0.00	<u>\$</u>
Charter with Disabilities			\$0.00	<u>\$</u>
Total				\$

Teachers Classroom Supply Assistance Program (h)

Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

Charter Allocation (i)

Total \$

Charter schools for the purpose of calculating the administrative fee for ESE charter schools. (j)

Charter schools with more than a 75% ESE student population, please place a 1 in the following box: \$

Average Revenue per Student: \$

time equivalent students.

fees:

ees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and h charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the l for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 ation into 250. Multiply that fraction times the funds available, then times 5%.

ning charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and h charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the l for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 ation into 250. Multiply that fraction times the funds available, then times 2%.

orical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods r of Education.

districts from state sources and from county tax collectors on various distribution schedules.

(1)	(2)	(3)	(4)
PK-3	0.00	1.115	0.0000 \$
PK-3 with ESE Services	0.00	1.115	0.0000 \$
4-8	242.00	1.000	242.0000 \$
4-8 with ESE Services	34.00	1.000	34.0000 \$
9-12	0.00	1.005	0.0000 \$
9-12 with ESE Services	0.00	1.005	0.0000 \$
Level 4 (Grade Level PK-3)		3.613	0.0000 \$
Level 4 (Grade Level 4-8)		3.613	0.0000 \$
Level 4 (Grade Level 9-12)		3.613	0.0000 \$
Level 5 (Grade Level PK-3)		5.258	0.0000 \$
Level 5 (Grade Level 4-8)		5.258	0.0000 \$
Level 5 (Grade Level 9-12)		5.258	0.0000 \$
L (Grade Level PK-3)	0.00	1.180	0.0000 \$
L (Grade Level 4-8)	24.00	1.180	28.3200 \$
L (Grade Level 9-12)	0.00	1.180	0.0000 \$
Per Education (Grades 9-12)		1.005	0.0000 \$
Totals	300.00		304.3200 \$

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

201

FTE (a)	Number of FTE	Base I (WFTE x
Additional Placement		\$
Additional Baccalaureate		\$
Additional International Certificate		\$
Additional Certified Career Education		\$
Additional High School Graduation		\$
Additional District ESE Supplement		\$
Total Additional FTE	0.0000	Additional Base Funds \$
Total Funded Weighted FTE	304.3200	Total Base Funding \$

Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student
	0.00	PK-3	251	\$ 978 \$
		PK-3	252	\$ 3,158 \$
		PK-3	253	\$ 6,444 \$
	34.00	4-8	251	\$ 1,097 \$
		4-8	252	\$ 3,277 \$
		4-8	253	\$ 6,563 \$
	0.00	9-12	251	\$ 780 \$
		9-12	252	\$ 2,960 \$
		9-12	253	\$ 6,247 \$
Total FTE with ESE Services	34.00			Total ESE Guarantee \$

Applications Allocation:

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

Enrollment (WFTE share)	(c)	<u>72,509</u>	x	0.7356%	\$
Supplement (WFTE share)	(c)	<u>0</u>	x	0.7356%	\$
Charter Local Effort (WFTE share)	(c)	<u>13,128,277</u>	x	0.7356%	\$
Charter to Funds Available (WFTE share)	(c)	<u>0</u>	x	0.7356%	\$
Charter Lottery (WFTE share)	(c)	<u>135,951</u>	x	0.7356%	\$

Class Size Reduction Funds:

<u>Weighted FTE (not including Add-On)</u> X	<u>DCD</u>	X	<u>Allocation factors</u>	=	
0.0000	0.9955		1,313.27	=	<u>0</u>
304.3200	0.9955		895.79	=	<u>271,380</u>
0.0000	0.9955		897.95	=	<u>0</u>
304.3200					Total Class Size Reduction Funds \$

Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

Transportation

Enter All Adjusted Fundable Riders	(f)	<u>120</u>	x	365	\$
Enter All Adjusted ESE Riders			x	1,369	\$

Connected Student Supplement

<u>Impact Aid Student Type</u>	<u>Number of Students</u>	<u>Exempt Property Allocation</u>	<u>Impact Aide Student Allocation</u>	<u>Total</u>
Indian Lands		\$0.00	\$0.00	\$
on Federal Lands		\$0.00	\$0.00	\$
with Disabilities			\$0.00	\$
Total				\$

Teachers Classroom Supply Assistance Program

Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

Charter Allocation

	(i)				
					Total \$

For the purpose of calculating the administrative fee for ESE charter schools.

If more than a 75% ESE student population, please place a 1 in the following box: \$

Average Revenue per Student: \$

Revenue Increase from Previous Year

Adjusted Revenue Per Student \$

and on student eligibility and meals provided, if participating in the National School Lunch Program.

Under s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated based on full-time equivalent students.

Fees:

Fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and other sources for charter students who may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the amount for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the population into 250. Multiply that fraction times the funds available, then times 5%.

For non-charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and other sources for charter students who may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the amount for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the population into 250. Multiply that fraction times the funds available, then times 2%.

Administrative funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods of the Department of Education.

Funds are provided to school districts from state sources and from county tax collectors on various distribution schedules.

(1)	(2)	(3)	(4)
c K-3	0.00	1.115	0.0000 \$
c K-3 with ESE Services	0.00	1.115	0.0000 \$
c 4-8	242.00	1.000	242.0000 \$
c 4-8 with ESE Services	34.00	1.000	34.0000 \$
c 9-12	0.00	1.005	0.0000 \$
c 9-12 with ESE Services	0.00	1.005	0.0000 \$
Level 4 (Grade Level PK-3)		3.613	0.0000 \$
Level 4 (Grade Level 4-8)		3.613	0.0000 \$
Level 4 (Grade Level 9-12)		3.613	0.0000 \$
Level 5 (Grade Level PK-3)		5.258	0.0000 \$
Level 5 (Grade Level 4-8)		5.258	0.0000 \$
Level 5 (Grade Level 9-12)		5.258	0.0000 \$
L (Grade Level PK-3)	0.00	1.180	0.0000 \$
L (Grade Level 4-8)	24.00	1.180	28.3200 \$
L (Grade Level 9-12)	0.00	1.180	0.0000 \$
per Education (Grades 9-12)		1.005	0.0000 \$
Totals	300.00		304.3200 \$

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

201

FTE (a)	Number of FTE	Base (WFTE)
Additional Placement		\$
Additional International Baccalaureate		\$
Additional International Certificate		\$
Additional Certified Career Education		\$
Additional High School Graduation		\$
Additional District ESE Supplement		\$
Total Additional FTE	0.0000	Additional Base Funds \$
Total Funded Weighted FTE	304.3200	Total Base Funding \$

Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student
	0.00	PK-3	251	\$ 978 \$
		PK-3	252	\$ 3,158 \$
		PK-3	253	\$ 6,444 \$
	34.00	4-8	251	\$ 1,097 \$
		4-8	252	\$ 3,277 \$
		4-8	253	\$ 6,563 \$
	0.00	9-12	251	\$ 780 \$
		9-12	252	\$ 2,960 \$
		9-12	253	\$ 6,247 \$
Total FTE with ESE Services	34.00			Total ESE Guarantee \$

Additional Funding from the ESE Guaranteed Allocation. Enter the FTE from 111, 112 and 113 above and matrix level. Students who do not have a matrix level should be allocated 251. This total should equal all ESE programs 111, 112 and 113 above.

Applications Allocation:
 er schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

Enrollment (WFTE share)	(c)	<u>72,509</u>	x	0.7356%	<u>\$</u>
Supplement (WFTE share)	(c)	<u>0</u>	x	0.7356%	<u>\$</u>
ary Local Effort (WFTE share)	(c)	<u>13,128,277</u>	x	0.7356%	<u>\$</u>
to Funds Available (WFTE share)	(c)	<u>0</u>	x	0.7356%	<u>\$</u>
ary Lottery (WFTE share)	(c)	<u>135,951</u>	x	0.7356%	<u>\$</u>

Reduction Funds:

<u>Weighted FTE (not including Add-On)</u>	X	<u>DCD</u>	X	<u>Allocation factors</u>	=	<u></u>
0.0000		0.9955		1,313.27	=	<u>0</u>
304.3200		0.9955		895.79	=	<u>271,380</u>
0.0000		0.9955		897.95	=	<u>0</u>
304.3200				Total Class Size Reduction Funds		\$

total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

Transportation	(f)				
Enter All Adjusted Fundable Riders		<u>120</u>	x	365	<u>\$</u>
Enter All Adjusted ESE Riders			x	1,369	<u>\$</u>

Connected Student Supplement (g)

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
and Indian Lands		\$0.00	\$0.00	<u>\$</u>
on Federal Lands		\$0.00	\$0.00	<u>\$</u>
with Disabilities			\$0.00	<u>\$</u>
Total				\$

Teachers Classroom Supply Assistance Program (h)

Allocation

er schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

vice Allocation	(i)			
				Total \$

for the purpose of calculating the administrative fee for ESE charter schools. (j)

more than a 75% ESE student population, please place a 1 in the following box: \$

Average Revenue per Student: \$

Revenue Increase from Previous Year

Adjusted Revenue Per Student \$

and on student eligibility and meals provided, if participating in the National School Lunch Program.

Under s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated on a per full-time equivalent student basis.

Fees:

Fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and other sources which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the amount available for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the population into 250. Multiply that fraction times the funds available, then times 5%.

For charter schools with a population of 250 or fewer students, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and other sources which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the amount available for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the population into 250. Multiply that fraction times the funds available, then times 2%.

Administrative fees and other non-fundamental funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey period by the Department of Education.

Administrative fees are also calculated on funds received by school districts from state sources and from county tax collectors on various distribution schedules.

(1)	(2)	(3)	(4)	(5)
PK-3	0.00	1.115	0.0000	\$
PK-3 with ESE Services	0.00	1.115	0.0000	\$
4-8	242.00	1.000	242.0000	\$
4-8 with ESE Services	34.00	1.000	34.0000	\$
9-12	0.00	1.005	0.0000	\$
9-12 with ESE Services	0.00	1.005	0.0000	\$
Level 4 (Grade Level PK-3)		3.613	0.0000	\$
Level 4 (Grade Level 4-8)		3.613	0.0000	\$
Level 4 (Grade Level 9-12)		3.613	0.0000	\$
Level 5 (Grade Level PK-3)		5.258	0.0000	\$
Level 5 (Grade Level 4-8)		5.258	0.0000	\$
Level 5 (Grade Level 9-12)		5.258	0.0000	\$
Level 6 (Grade Level PK-3)	0.00	1.180	0.0000	\$
Level 6 (Grade Level 4-8)	24.00	1.180	28.3200	\$
Level 6 (Grade Level 9-12)	0.00	1.180	0.0000	\$
Special Education (Grades 9-12)		1.005	0.0000	\$
Totals	300.00		304.3200	\$

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

201

Category (a)	Number of FTE	Base I (WFTE x
Advanced Placement		\$
International Baccalaureate		\$
Advanced International Certificate		\$
Certified Career Education		\$
High School Graduation		\$
Special Education Supplement		\$
Total Additional FTE	0.0000	Additional Base Funds \$
Total Funded Weighted FTE	304.3200	Total Base Funding \$

Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student
	0.00	PK-3	251	\$ 978 \$
		PK-3	252	\$ 3,158 \$
		PK-3	253	\$ 6,444 \$
	34.00	4-8	251	\$ 1,097 \$
		4-8	252	\$ 3,277 \$
		4-8	253	\$ 6,563 \$
	0.00	9-12	251	\$ 780 \$
		9-12	252	\$ 2,960 \$
		9-12	253	\$ 6,247 \$
Total FTE with ESE Services	34.00			Total ESE Guarantee \$

Applications Allocation:

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

Enrollment (WFTE share)	(c)	<u>72,509</u>	x	0.7356%	\$
Supplement (WFTE share)	(c)	<u>0</u>	x	0.7356%	\$
Charter Local Effort (WFTE share)	(c)	<u>13,128,277</u>	x	0.7356%	\$
Charter to Funds Available (WFTE share)	(c)	<u>0</u>	x	0.7356%	\$
Charter Lottery (WFTE share)	(c)	<u>135,951</u>	x	0.7356%	\$

Class Size Reduction Funds:

Weighted FTE (not including Add-On) X	DCD	X	Allocation factors	=	
0.0000	0.9955	1,313.27		=	<u>0</u>
304.3200	0.9955	895.79		=	<u>271,380</u>
0.0000	0.9955	897.95		=	<u>0</u>
304.3200					Total Class Size Reduction Funds \$

Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

Transportation

Enter All Adjusted Fundable Riders	(f)	<u>120</u>	x	365	\$
Enter All Adjusted ESE Riders			x	1,369	\$

Connected Student Supplement

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
Indian Lands		\$0.00	\$0.00	\$
on Federal Lands		\$0.00	\$0.00	\$
with Disabilities			\$0.00	\$
Total				\$

Teachers Classroom Supply Assistance Program

Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

Per Capita Allocation

	(i)				
					Total \$

For the purpose of calculating the administrative fee for ESE charter schools.

For more than a 75% ESE student population, please place a 1 in the following box: \$

Average Revenue per Student: \$

Revenue Increase from Previous Year

Adjusted Revenue Per Student \$

and on student eligibility and meals provided, if participating in the National School Lunch Program.

Under s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated based on full-time equivalent students.

Fees:

Fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and other sources. For charter schools with a population of 251 or more students the difference in the fee calculation and the amount available for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the amount into 250. Multiply that fraction times the funds available, then times 5%.

For non-charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and other sources. For charter schools with a population of 251 or more students the difference in the fee calculation and the amount available for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the amount into 250. Multiply that fraction times the funds available, then times 2%.

Historical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods of the Department of Education.

Funding is provided to school districts from state sources and from county tax collectors on various distribution schedules.

(1)	(2)	(3)	(4)
c K-3	0.00	1.115	0.0000 \$
c K-3 with ESE Services	0.00	1.115	0.0000 \$
c 4-8	242.00	1.000	242.0000 \$
c 4-8 with ESE Services	34.00	1.000	34.0000 \$
c 9-12	0.00	1.005	0.0000 \$
c 9-12 with ESE Services	0.00	1.005	0.0000 \$
Level 4 (Grade Level PK-3)		3.613	0.0000 \$
Level 4 (Grade Level 4-8)		3.613	0.0000 \$
Level 4 (Grade Level 9-12)		3.613	0.0000 \$
Level 5 (Grade Level PK-3)		5.258	0.0000 \$
Level 5 (Grade Level 4-8)		5.258	0.0000 \$
Level 5 (Grade Level 9-12)		5.258	0.0000 \$
L (Grade Level PK-3)	0.00	1.180	0.0000 \$
L (Grade Level 4-8)	24.00	1.180	28.3200 \$
L (Grade Level 9-12)	0.00	1.180	0.0000 \$
per Education (Grades 9-12)		1.005	0.0000 \$
Totals	300.00		304.3200 \$

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

201

FTE (a)	Number of FTE	Base (WFTE)
nd Placement		\$
ional Baccalaureate		\$
nd International Certificate		\$
ertified Career Education		\$
gh School Graduation		\$
strict ESE Supplement		\$
Total Additional FTE	0.0000	Additional Base Funds \$
Total Funded Weighted FTE	304.3200	Total Base Funding \$

Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student
	0.00	PK-3	251	\$ 978 \$
		PK-3	252	\$ 3,158 \$
		PK-3	253	\$ 6,444 \$
	34.00	4-8	251	\$ 1,097 \$
		4-8	252	\$ 3,277 \$
		4-8	253	\$ 6,563 \$
	0.00	9-12	251	\$ 780 \$
		9-12	252	\$ 2,960 \$
		9-12	253	\$ 6,247 \$
Total FTE with ESE Services	34.00			Total ESE Guarantee \$

al Funding from the ESE Guaranteed
n. Enter the FTE from 111,112 and
ade and matrix level. Students who
ve a matrix level should be
ed 251. This total should equal all
1 programs 111, 112 and 113 above.

Applications Allocation:

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

Enrollment (WFTE share)	(c)	<u>72,509</u>	x	0.7356%	<u>\$</u>
Supplement (WFTE share)	(c)	<u>0</u>	x	0.7356%	<u>\$</u>
Charter Local Effort (WFTE share)	(c)	<u>13,128,277</u>	x	0.7356%	<u>\$</u>
Charter to Funds Available (WFTE share)	(c)	<u>0</u>	x	0.7356%	<u>\$</u>
Charter Lottery (WFTE share)	(c)	<u>135,951</u>	x	0.7356%	<u>\$</u>

Reduction Funds:

<u>Weighted FTE (not including Add-On)</u>	X	<u>DCD</u>	X	<u>Allocation factors</u>	=	<u></u>
0.0000		0.9955		1,313.27	=	<u>0</u>
304.3200		0.9955		895.79	=	<u>271,380</u>
0.0000		0.9955		897.95	=	<u>0</u>
304.3200				Total Class Size Reduction Funds		\$

Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

Transportation	(f)				
Enter All Adjusted Fundable Riders		<u>120</u>	x	365	<u>\$</u>
Enter All Adjusted ESE Riders			x	1,369	<u>\$</u>

Connected Student Supplement (g)

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
Band and Indian Lands		\$0.00	\$0.00	<u>\$</u>
Charter on Federal Lands		\$0.00	\$0.00	<u>\$</u>
Charter with Disabilities			\$0.00	<u>\$</u>
Total				\$

Teachers Classroom Supply Assistance Program (h)

Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

Service Allocation (i)

Total \$

For the purpose of calculating the administrative fee for ESE charter schools. (j)

For more than a 75% ESE student population, please place a 1 in the following box: \$

Average Revenue per Student: \$

Revenue Increase from Previous Year

Adjusted Revenue Per Student \$

and on student eligibility and meals provided, if participating in the National School Lunch Program.

Under s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated on full-time equivalent students.

Fees:

Fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP available to charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the amount for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, reduce the population into 250. Multiply that fraction times the funds available, then times 5%.

For non-charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP available to charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the amount for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, reduce the population into 250. Multiply that fraction times the funds available, then times 2%.

Administrative fees and other non-personal funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey period by the Department of Education.

Administrative fees are collected from school districts from state sources and from county tax collectors on various distribution schedules.

Evaluation of SpringBoard® English Textual Power™ and Mathematics with Meaning™ Pilot Program

Mary-Margaret Kerns

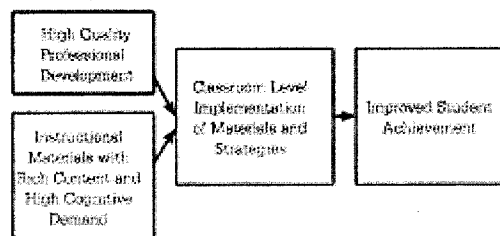
Introduction

Building on the success of the Advanced Placement Program® and the findings regarding academic intensity and the quality of one's high school curriculum in preparation for success in college (Adelman, 1999), the College Board developed a program in the content areas of English and mathematics designed to prepare students for challenging content as early as grade six and extending through high school. Conceived with the goal of creating high-quality professional development activities with associated instructional strategies embedded in instructional materials rich in content and cognitive demand, the resulting Textual Power and Mathematics with Meaning™ instructional materials and professional development ultimately seek to improve student engagement and achievement in the classroom.

Textual Power and Mathematics with Meaning were piloted in high schools in academic year 2001-02. In academic year 2002-03 Textual Power and Mathematics with Meaning were piloted in both middle schools and high schools. These pilot programs continued in middle schools and high schools in academic year 2003-04. To inform the development process, the College Board contracted with researchers from the American Institutes for Research (AIR) to conduct a formative evaluation of the program. The first 12-month evaluation phase examined the 2002-03 academic year and is referred to as Year 1. The second 12-month evaluation examined the 2003-04 academic year and is referred to as Year 2.

The successful implementation of any educational program or policy is dependent on an assumed set of linked components that will enable the main actors to effect change

and desired outcomes (American Institutes for Research, 2003). The implementation and subsequent effect on student achievement is predicated on a set of assumed linkages, depicted as follows:



As such, both of these yearlong evaluation studies examined the questions of classroom implementation of Textual Power and Mathematics with Meaning and student achievement.

Year 1 Evaluation of Textual Power and Mathematics with Meaning

To address the questions of implementation and achievement, the Year 1 evaluation relied on these sources of data:

- **Participant Teacher Survey:** Administered in three waves (Introductory, Reflections, and Final) to a nationally representative sample (see Tables 1-3);
- **District Administrator Interviews;**
- **Site Visits:** Classroom observations in treatment and comparison classes, teacher interviews, principal interviews, and student focus groups (see Tables 4 and 5);

- **Student Work Analyses:** Collection and analysis of student work from both treatment and comparison classes (see Table 6); and
- **Student Achievement Analyses:** Using student-level achievement data for matched treatment and control classes from two districts.

Implementation Findings

The Implementation Process

The teacher is the central implementor of Textual Power and Mathematics with Meaning, but districts, schools, and the College Board play significant roles in the dissemination and support of the programs. Creating an environment for implementation begins as the College Board establishes a relationship with the district, school, and teacher, and supports this relationship by producing unique instructional materials and high-quality professional development. Drawing from the site visit data, findings regarding implementation at the school and district follow:

- **Teacher Buy-In.** Teacher motivation and enthusiasm are central to effective use of the instructional strategies and materials, given the degree of autonomy associated with implementation. The professional development acted as a catalyst for buy-in, receiving praise from teachers and administrators; however, participation in decision making regarding the use of the program influenced teacher investment and dedication to the use of the materials.
- **Curricular Consistency.** Levels of consistency within a school or district affect the capability of teachers to effectively use Textual Power and Mathematics with Meaning. While many districts indicated that the program is a good "fit" with their goals and standards, other districts needed to examine how to incorporate the instructional material topics into their curricula.
- **Professional Community.** The existence of a trained teacher network or interconnected professional community is a key factor in maintaining implementation over time.
- **Instructional Leadership.** The leadership of either a principal or key teacher coordinator was found to be an effective method of instructional support.
- **Student Engagement.** The perception of student engagement together with the belief that Textual Power and Mathematics with Meaning add value to instruction, strongly influenced teachers to make changes to align instructional philosophy and practice with the programs.

Classroom Implementation

Interview and survey data indicate differences in teachers' patterns of use and perceptions of individual units; however, teachers generally perceived the Textual Power and Mathematics with Meaning to be of value in content and student engagement.

- **Usage Trends.** The majority of all teachers reported making minor modifications to the units prior to using them, with Textual Power users more frequently reporting making modifications. Teachers reported using the instructional units with regular students, advanced students, and classes of mixed ability, but few teachers reported using the materials with students of the lowest ability levels.
- **Usage Differences.** Differences between schools, between teachers, and between content disciplines emerged. Teachers of Textual Power were more likely to treat the materials as a comprehensive instructional package. Textual Power teachers commented on the need for more scaffolding, whereas teachers of Mathematics with Meaning felt some assignments were especially challenging because of the reading skills required. The importance of alignment with standards and curricula emerged.
- **Perception of Value.** Despite varying usage patterns and alignment concerns, significantly over 80 percent of both Textual Power and Mathematics with Meaning teachers reported that they felt the instructional materials provide a good framework for what students should know and be able to do.
- **Perception of Engagement.** Despite some questions regarding level of challenge of the instructional materials, on the Final Survey 86 percent of the Mathematics with Meaning teachers and 80 percent of the Textual Power users reported that they agreed or strongly agreed that their students were actively engaged with the instructional units. The interview data reveal that teachers attribute this engagement to the group work, the active nature of the units, and the hands-on activities.

Student Work Analyses

Student work samples from both treatment classes and control classes were analyzed. Textual Power teachers and Mathematics with Meaning teachers submitted student work samples based on the instructional materials and related assignments, and the respective control class teachers submitted assignments they considered typical. The assignments were coded based on the degree to which students exhibited

different types of conceptual and technical skills using rubrics developed specifically for the evaluation of Textual Power and Mathematics with Meaning.

- In all categories coded for the English work samples, there was little difference noted between the Textual Power classes and the control classes. The researchers noted that the analysis was hindered by the fluid and creative nature of language and communication, and the diversity within the sample of collected work.
- The Mathematics with Meaning work samples scored much higher than the control group work samples in three of the four mathematics criteria, *conceptual understanding, communication, and problem solving/reasoning*.

Classroom Observations

The findings from the classroom observations dramatically sharpen the findings regarding classroom implementation and reveal manifest differences between Textual Power and Mathematics with Meaning classes and control classes in several areas. For each separate activity in each classroom observation, researchers coded the observational data with a focus on materials used, activity organization, teaching strategies, and classroom outcomes. Textual Power and Mathematics with Meaning classes differ markedly from the comparison control classes in the following ways:

- The number of distinct instructional activities was generally greater in Textual Power and Mathematics with Meaning classes.
- Textual Power and Mathematics with Meaning classes generally spent more time in interactive classroom modes.
- Textual Power and Mathematics with Meaning teachers spent more time guiding student work as opposed to lecturing.
- Student behavior was markedly better in Textual Power and Mathematics with Meaning classes.
- Teachers spent more time on instruction versus classroom management or unrelated activities in Textual Power and Mathematics with Meaning classes.
- Student engagement as measured by apparent time-on-task was markedly higher in Textual Power and Mathematics with Meaning classes.
- Mathematics with Meaning teachers employed investigative learning strategies more frequently than their counterparts in control classes and used small student learning groups more frequently than the teachers in the control classes.

Achievement Findings

To examine the relationship of instructional materials and instructional strategies associated with Textual Power and Mathematics with Meaning with student achievement, student achievement data at two points, spring 2002 and spring 2003, were analyzed for the same cohort of students. A "pretest/posttest with matched control group" research design was utilized to determine achievement differentials between Textual Power classes and control classes, and Mathematics with Meaning classes and control classes. The control classes were matched on prior achievement, grade level, and courses. Student-level achievement data from two districts—District A and District B—were obtained. In addition, analyses were conducted separately by school level (middle school and high school) and subject (English and mathematics). There were seven separate analyses—two school districts by two school levels by two subjects, minus District B math in middle school where Mathematics with Meaning was not implemented. Hierarchical Linear Modeling (HLM) was used for the analyses. The results of the analyses found both positive and significant effects on student achievement for 2002-03 (Year 1) of the evaluation of Textual Power and Mathematics with Meaning at the following levels (see Table 7):

- District A, High School, Textual Power, $p < .01$
- District A, High School, Mathematics with Meaning, $p < .05$

Follow-up analyses of state mean gains in comparison to District A gains in both Textual Power and Mathematics with Meaning classes revealed that the results in the District A high school analyses were not only statistically significant but of an important magnitude. These achievement findings provide evidence that Textual Power and Mathematics with Meaning can effect positive change in student achievement levels.

Year 2 Evaluation of Textual Power and Mathematics with Meaning

The research activities in the Year 2 evaluation are methodologically similar to those undertaken in Year 1. Although smaller in scope, the Year 2 evaluation was deeply considerate of the Year 1 work, building from those findings but pushing beyond the short-term consideration of implementation to examine the staying power of Textual Power and Mathematics with Meaning.

Evaluation of SpringBoard English Textual Power and Mathematics with Meaning Pilot Program

To address the questions of implementation and achievement in Year 2, the evaluation relied on these sources of data:

- **Site Visits:** Site visits to high schools and middle schools included interviews with teachers and administrators as well as observations of classes with teachers who were using Textual Power and Mathematics with Meaning and comparison classes in English and mathematics respectively (see Table 8).
- **Student Achievement:** Student achievement data from state assessments—District A and District B that were analyzed in Year 1—were analyzed for Textual Power classes and matched control classes, and for Mathematics with Meaning and matched control classes.

Implementation Findings

From the interview data collected at school sites, several themes emerged relevant to the implementation and sustainability of Textual Power and Mathematics with Meaning. The emerging themes follow:

- **Professional Development.** From the perspectives of teachers and administrators, the professional development associated with Textual Power and Mathematics with Meaning is reported as one of the most exciting and beneficial aspects of the program. Teachers from both disciplines describe the experience as positive—specifically the useful activities, active learning, and the opportunity for collective participation. A limited amount of criticism of the content was cited.
- **Pedagogy.** Teachers using Textual Power and Mathematics with Meaning cite the hands-on approach and collaborative nature provided by the instructional activities which provide new ideas and creative methods for engaging students in nontraditional lessons and texts. Successful implementation requires a willingness to try new instructional techniques.
- **Content and Skills.** Most teachers using Textual Power and Mathematics with Meaning agree that the content of the instructional materials are appropriate for their classes and place an emphasis on higher-order and critical thinking skills. However, concern regarding basic skills and state assessments can force teachers to relegate Textual Power and Mathematics with Meaning instructional materials to a lower priority to allow for coverage of basic skills.
- **Materials.** Textual Power and Mathematics with Meaning materials disproportionately were described as comprehensive. The availability of materials emerged as a consideration, as well as future funding to continue the professional development and implementation of the program.

School Capacity

Site visit data revealed the strong influence of school structures and conditions on the depth of implementation. The findings revealed several school capacity elements to be significant factors:

- **Teachers' Knowledge, Skills, and Dispositions.** Teachers across the sites described Textual Power and Mathematics with Meaning as grounded in good teaching practices. Teachers described favorably the comprehensive nature that balances skills with higher-order thinking and problem solving. The teachers' varied descriptions of "usefulness" appears tied to the type of student population with which they work.
- **Program Coherence.** A significant tension exists between a teacher's desire to use Textual Power or Mathematics with Meaning and the perceived necessity to address one or more of the following: state standards, preparation of students for tests, and mandates for other instructional initiatives. Where adoption of Textual Power or Mathematics with Meaning is voluntary, (i.e., teacher choice rather than district adoption), the tension is unavoidable. In schools and districts that endorse Textual Power and Mathematics with Meaning initiatives (e.g., incorporating into pacing guides), this tension appears to be lessened greatly.
- **Professional Community.** The presence of a professional community facilitates coordinated instruction, and teachers find the opportunities for professional conversations stimulating, motivating, and productive. The availability of the professional community to support sustained use of Textual Power or Mathematics with Meaning is a function of program coherence and instructional priorities (i.e., teachers in the professional community recognize the initiatives as closely linked to their instructional objectives).
- **Technical Resources.** Access to resources is directly linked to sustainability. Few sites reported particular difficulty with gaining the resources to support the implementation of Textual Power or Mathematics with Meaning. This may be a function of defining the initiatives as instructional initiatives that emphasize instructional strategies and professional development rather than a curricular program that requires the resources. Funding for future use remains a concern for some districts.

Classroom Observations

The findings from the classroom observations describe the implementation of Textual Power and Mathematics with

Meaning at the level at which the initiatives arguably have their greatest impact—in the classroom. To address the complexities of classroom dynamics, classroom-based factors including teacher-student interactions, types of teaching strategies, and student engagement were examined through direct and detailed classroom observations. Combining the Year 2 observations (see Tables 9 and 10) with the classroom observations from Year 1 reveals manifest differences in several areas between Textual Power classes and English control classes and Mathematics with Meaning classes and mathematics control classes. The differences follow:

Materials Used:

- Teachers trained in Mathematics with Meaning used more manipulatives than the mathematics comparison classes.
- Teachers trained in Textual Power used more text-based material (e.g., fiction, drama, and poetry) than did the English comparison classes.

Classroom Organization:

- Textual Power and English comparison classes had very similar rates of organization in terms of whole-class, small group, and individual groupings.
- Textual Power and English comparison classes had similar rates of student focus in terms of passive and interactive modes.
- Mathematics with Meaning classes exhibited higher rates of organizational strategies that are more interactive (e.g., group work, pair work, and whole-class discussions) than did mathematics comparison classes.
- Mathematics with Meaning teachers spent more time leading and supporting student work than did the comparison classes in which teachers spent more time presenting information.
- Both Textual Power and Mathematics with Meaning classes included a greater number of distinct instructional activities than the respective comparison classes.

Instructional Strategies

- Textual Power classes used strategies related to Making Meaning from Texts and Creating and Presenting Texts at a higher rate than the comparison classes which had higher rates of Practice and Drill strategies.
- Mathematics with Meaning classes used Problem Solving, Reasoning and Proof, Communication, Connections, and Representation strategies at a higher rate than mathematics comparison classes. The Problem Solving and Communication strategies appearing most frequently

were those related to learning, investigating, and practicing mathematical concepts; discussing or writing mathematical explanations; and clearly discussing or writing about mathematics.

Student Engagement:

- Student behavior disturbances occurred less frequently in both Textual Power and Mathematics with Meaning classes than in the respective comparison classes.
- Both Textual Power and Mathematics with Meaning classes had higher rates of student on-task behavior than did the comparison classes.
- Mathematics with Meaning classes exhibited higher rates of student on-task participation in group and other student-centered activities than did the mathematics comparison classes.

The classroom observation data complement the interview data. The findings suggest that students in classes using Textual Power or Mathematics with Meaning are engaged by the work and that the skills in the instructional activities require more complex thought processes and strategies than are typically demanded. These differences appear more dramatic for Mathematics with Meaning, but both Textual Power and Mathematics with Meaning have positive impacts in the classroom.

Achievement Findings

To examine the relationship of instructional materials and instructional strategies associated with Textual Power and Mathematics with Meaning with student achievement, student achievement data at two points in time, spring 2003 and spring 2004, were analyzed for the same cohort of students. Student achievement was measured by state assessments. The same two districts—District A and District B—that were analyzed in the Year 1 evaluation were analyzed in Year 2. A “pretest/posttest with matched control group” research design was utilized to determine achievement differentials between Textual Power classes and control classes, and Mathematics with Meaning classes and control classes. The control classes were matched on prior achievement, grade level, and courses.

Analyses were performed separately for the two school districts (Districts A and B). The analyses were conducted separately by subject (English and mathematics) and by school level (middle and high school). Data were not available for District B middle schools; therefore six analyses were undertaken. Hierarchical Linear Modeling (HLM) was used for the analyses. The results of the analyses found both positive and significant effects on student achievement for

Evaluation of SpringBoard English Textual Power and Mathematics with Meaning Pilot Program

2003-04 (Year 2) of the evaluation of Textual Power and Mathematics with Meaning at the following levels (see Tables 11 and 12):

- District A, High School, Mathematics, $p < .05$
- District A, Middle School, Mathematics, $p < .05$
- District A, Middle School, English, $p < .01$

As the analyses reveal, Mathematics with Meaning and Textual Power were associated with higher achievement in District A at the middle school in both subjects and at the high school in mathematics only. Mathematics with Meaning and Textual Power were not associated with higher achievement in District B at the high school.

Year 2 achievement findings reveal significant achievement gains at the middle school which were not found in the Year 1 achievement analyses. A possible explanation is that Textual Power and Mathematics with Meaning were piloted in middle schools a year later than in high schools, and this suggests that there is a cumulative effect (i.e., more than one year) on teaching and learning associated with Textual Power and Mathematics with Meaning.

Utilization of Findings

The findings associated with the evaluations of Textual Power and Mathematics with Meaning in Years 1 and 2 of the pilot informed the development (i.e., additional instruc-

tional materials, enriched instructional strategies materials, and enhanced professional development) of their current forms in the SpringBoard™ Program. While informing the development process, the findings apply to the implementation of the instructional materials, strategies, and professional development at these points in time (i.e., 2002-03, 2003-04). Additional research regarding these components in the larger multicomponent SpringBoard Program should be undertaken to ascertain their contributions to implementation and achievement in SpringBoard classrooms.

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References

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Table 1

Sample and Response Rates, Introductory Survey		
<i>In Scope Sample</i>		
English	108	
Math	118	
Total	226	
<i>Respondents by Subject</i>		
English	83	77%
Math	92	78%
Total	175	77%

Table 3

Sample and Response Rates, Final Survey		
<i>In Scope Sample, Final Survey</i>		
English	61	
Math	63	
Site Visit Teachers	2	
Total	126	
<i>Respondents by Subject</i>		
English	53	87%
Math	51	81%
Total	104	83%

Table 2

Number of Reflections Surveys Completed by Teachers	
Number of Surveys	Number of Teachers
1	59
2	5
3	3
4	3
5	4
6	3

Table 4

Regional and School Characteristics of Site Visit Schools					
District	Region	Locale	Middle Schools/ High Schools	Teachers (MS/ HS)	Program(s)
D	mid-Atlantic	urban	2 / 2	5 / 6	TP/MWM
C	mid-Atlantic	rural	1 / 0	9 / 0	TP/MWM
B	Western	urban	0 / 3	0 / 6	TP/MWM
F	Southern	mid-sized city	0 / 1	0 / 4	TP/MWM
E	Western	urban	0 / 2	0 / 6	TP
G	mid-Atlantic	rural	2 / 0	3 / 0	MWM

Table 5

Percentages of Types of Students in Classes Observed										
	# of Class Observations	Mean Length of Class in Minutes	% of Observations with Honors Students	% of Observations with Remedial Students	Mean # of Students in Class	Mean # of Asian Students	Mean # of Black Students	Mean # of Hispanic Students	Mean # of White Students	Mean # of Female Students
<i>English</i>										
Textual Power	23	78	4%	0%	19	12%	37%	27%	26%	47%
English Comparison	13	75	15%	0%	19	13%	38%	30%	29%	50%
<i>Math</i>										
Mathematics with Meaning	16	73	44%	22%	21	7%	33%	20%	39%	47%
Math Comparison	12	79	33%	33%	20	9%	20%	27%	44%	53%
<i>Total</i>										
Total TP and MWM Classes	41	76	22%	10%	19	10%	35%	24%	31%	47%
Total Comparison	25	77	24%	16%	20	11%	29%	24%	36%	52%
Total	66	76	23%	12%	20	10%	33%	24%	33%	49%

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Table 6
Collected Sample Distribution

District	Region	Locale	Math		ELA	
			Pieces of Student Work	Number of Teachers	Pieces of Student Work	Number of Teachers
D	mid-Atlantic	urban	27	3	47	4
C	mid-Atlantic	rural	53	4	27	3
B	Western	urban	49	4	10	1
F	Southern	mid-sized city	10	1	19	2
E	Western	urban	—	—	58	5
G	mid-Atlantic	rural	31	3	—	—

Table 7
HLM Coefficient Estimates for District A High School

Math	Coefficient Estimate	English	Coefficient Estimate
2002 DSS math achievement score	0.62***	2002 DSS reading achievement score	0.65***
Gender (1=female; 0=male)	-17.17**	Gender (1=female; 0=male)	8.11
Race (1=white; 0=otherwise)	2.95	Race (1=white; 0=otherwise)	10.94
Free or reduced lunch (1=student has free or reduced lunch; 0=otherwise)	-19.07*	Free or reduced lunch (1=student has free or reduced lunch; 0=otherwise)	-25.18
LEP (1=student is LEP; 0=otherwise)	-1.62	LEP (1=student is LEP; 0=otherwise)	-9.11
Disability (0=no disability or gifted; 1=diagnosed with disability)	-7.31	Disability (0=no disability or gifted; 1=diagnosed with disability)	-8.51
Teacher Certification (1=noncertified subject/talent expert; 0=certified)	12.92	Teacher Certification (1=noncertified subject/talent expert; 0=certified)	-71.66
Mixed Grade* (1=1-9; 0=10)	-49.77***	Mixed Grade (there is only one group)	N.A.
Course (1=Algebra I; 0=Algebra II)	24.63*	Course (there is only one course)	N.A.
Treatment group (1=treatment; 0=control)	15.18*	Treatment group (1=treatment; 0=control)	45.62**

Note: *p < .05; **p < .01; ***p < .0001

*The definition of mixed-grade variable is related to the concentration of different students in different grades in the class.

**When Math gain scores (2003 scores - 2002 scores) were used, p=0.13 for the treatment group coefficient estimate.

**When English gain scores (2003 scores - 2002 scores) were used, similar results were obtained for the treatment group coefficient estimate.

Table 8
Regional and School Characteristics of Site Visit Schools

District	Region	Locale	School level	Number of schools visited	Number of teachers observed and interviewed	MWM/TP teachers interviewed only	Program used
A	South	rural	High	2	11	2	TP/MWM
B	West	urban	High	2	6	0	TP
F	South	mid-sized city	Middle	2	11	1	TP/MWM
J	Northeast	mid-sized city	Middle	2	6	0	MWM
I	Southwest	rural	High	3	3	1	TP
K	Midwest	mid-sized city	High	2	6	1	MWM

Table 9

Numbers of English Observations with Descriptive Information, 2003 and 2004						
	Number of Class Observations	Mean Length of Classes in Minutes	Mean Length of Observations in Minutes	Percent of Observations with Honors Students	Percent of Observations with Remedial Students	Mean Number of Students in Classes
2003						
Textual Power	24	73	62	7%	0%	19
English Comparison	12	66	64	13%	0%	19
2004						
Textual Power	13	81	69	38%	8%	26
English Comparison	7	80	70	29%	43%	26
2003 and 2004						
All Textual Power Classes	37	76	65	16%	3%	21
All English Comparisons	19	71	66	21%	16%	22
All English Classes	56	74	65	18%	7%	21

Table 10

Numbers of Mathematics Observations with Descriptive Information, 2003 and 2004						
	Number of Class Observations	Mean Length of Classes in Minutes	Mean Length of Observations in Minutes	Percent of Observations with Honors Students	Percent of Observations with Remedial Students	Mean Number of Students in Classes
2003						
Mathematics with Measuring	16	73	66	44%	22%	31
Mathematics Comparison	13	79	60	33%	33%	20
2004						
Mathematics with Measuring	15	78	64	27%	13%	22
Mathematics Comparison	8	79	64	25%	25%	22
2003 and 2004						
All MWM Classes	33	76	65	36%	18%	21
All Mathematics Comparisons	20	79	62	30%	30%	21
All Mathematics Classes	53	77	64	34%	23%	21

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Table 11

HLM Coefficient Estimates for District A High School

Mathematics	Coefficient Estimate	English	Coefficient Estimate
2003 DSS mathematics achievement score (prior achievement)	0.67***	2003 DSS reading achievement score (prior achievement)	0.92***
Gender (1=female; 0= male)	-16.41**	Gender (1=female; 0= male)	26.71
White (1=white; 0=otherwise)	1.71	White (1=white; 0=otherwise)	72.23
Hispanic (1=Hispanic; 0=otherwise)	-16.54	Hispanic (1=Hispanic; 0=otherwise)	83.94
Black (1=black; 0=otherwise)	-1.57	Black (1=black; 0=otherwise)	34.02
LEP (1=never been considered for LEP; 0=otherwise)	19.04	LEP (1=never been considered for LEP; 0=otherwise)	54.16
IEP (1=no disability or gifted; 0=diagnosed with disability)	-3.80	IEP (1=no disability or gifted; 0=diagnosed with disability)	59.09
Grade 10 (1=grade 10; 0=otherwise)	30.17**	Grade 10 (1=grade 10; 0=otherwise)	136.50**
Grade 11 (1=grade 11; 0=otherwise)	0.00	Grade 11 (1=grade 11; 0=otherwise)	0.00
Grade 12 (1=grade 12; 0=otherwise)	0.00	Course (there is only one course "Eng 1")	N.A.
Course 1 (1=Algebra I and class grade C9; 0=otherwise)	-33.97	Treatment Group (1=treatment; 0=control) ^d	-19.92
Course 2 (1=Algebra I Hon and class grade C9; 0=otherwise)	-13.97		
Course 3 (1=Algebra IA and class grade C9; 0=otherwise)	-64.56**		
Course 4 (1=Algebra IA and class grade P9; 0=otherwise)	-81.43***		
Course 5 (1=Algebra IB and class grade C9; 0=otherwise)	-46.33*		
Course 6 (1=Algebra IB and class grade P9; 0=otherwise)	-60.21**		
Course 7 (1=Algebra IB and class grade C10; 0=otherwise)	-50.01**		
Course 8 (1=Algebra II and class grade C10; 0=otherwise)	-17.70		
Course 9 (1=Algebra II and class grade P10; 0=otherwise)	-13.76		
Treatment Group (1=treatment; 0=control) ^e	17.02*		

Note: *p < .05; **p < .01; ***p < .0001

^aClass Grade is related to the concentration of different students from different grades in a class.

^bWhen mathematics gain scores (spring 2004 scores-spring 2003 scores) were used, similar results were obtained for the Treatment Group coefficient estimate.

^cFor those mathematics coefficient estimates that were significant, their interaction with the Treatment Group variable was tested but the interaction with the Treatment Group variable was found to be nonsignificant.

^dWhen English gain scores (spring 2004 scores-spring 2003 scores) were used, similar results were obtained for the Treatment Group coefficient estimate.

Table 12

HLM Coefficient Estimates for District A Middle School

Mathematics	Coefficient Estimate	English	Coefficient Estimate
2003 DSS mathematics achievement score (prior achievement)	0.47***	2003 DSS reading achievement score (prior achievement)	0.69***
Gender (1=female; 0= male)	-4.35	Gender (1=female; 0= male)	1.99
White (1=white; 0=otherwise)	-9.61	White (1=white; 0=otherwise)	-6.26
Hispanic (1=Hispanic; 0=otherwise)	-18.87	Hispanic (1=Hispanic; 0=otherwise)	-20.59
Black (1=black; 0=otherwise)	-45.31**	Black (1=black; 0=otherwise)	-34.58
LEP (1=never been considered for LEP; 0=otherwise)	13.32	LEP (1=never been considered for LEP; 0=otherwise)	16.47
IEP (1=no disability or gifted; 0=diagnosed with disability)	16.10	IEP (1=no disability or gifted; 0=diagnosed with disability)	30.28*
Grade 7 (1=grade 7; 0=otherwise)	46.80	Grade 7 (1=grade 7; 0=otherwise)	35.40***
Grade 8 (1=grade 8; 0=otherwise)	41.14**	Grade 8 (1=grade 8; 0=otherwise)	33.88**
Course 1 (1= Algebra I Hon; 0=otherwise)	73.79***	Course 1 (1=M/J Lang Arts 1; 0=otherwise)	0.00
Course 2 (1= Algebra IA; 0=otherwise)	44.07***	Course 2 (1= M/J Lang Arts 2; 0=otherwise)	0.00
Course 3 (1=Algebra II Hon; 0=otherwise)	117.69***	Course 2 (1= M/J Lang Arts 3; 0=otherwise)	16.34
Course 4 (1=M/J Mathematics 1; 0=otherwise)	0.00	Treatment Group ^d (1=treatment; 0=control) ^e	20.88**
Course 5 (1=M/J Mathematics 2, Adv; 0=otherwise)	43.48		
Treatment Group ^d (1=treatment; 0=control) ^e	22.72*b		

Note: *p < .05; **p < .01; ***p < .0001

^aWhen mathematics gain scores (spring 2004 scores-spring 2003 scores) were used, similar results were obtained for the Treatment Group coefficient estimate.

^bFor those mathematics coefficient estimates that were significant, their interaction with the Treatment Group variable was tested but the interaction with the Treatment Group variable was found to be nonsignificant.

^cWhen English gain scores (spring 2004 scores-spring 2003 scores) were used, similar results were obtained for the Treatment Group coefficient estimate.

^dFor those English coefficient estimates that were significant, their interaction with the Treatment Group variable was tested, but the interaction with the Treatment Group variable was found to be nonsignificant.



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Engaging Strategies for All Students: The SpringBoard® Example

Jane Delgado

Introduction

In order to meet the needs of all students and to discover the most effective educational models for students who learn in different ways, researchers have investigated a variety of educational models, some empirical and some theoretical. Added to these more formal approaches are the efforts of thousands of teachers at all educational levels who are engaged in the action research that informs the effective classroom. Dedicated teachers, day after day, try various approaches with a wide variety of students, implementing those techniques that are effective and abandoning the ones that don't work. They seek out new information from academic sources and their colleagues so that they can incorporate and evaluate those new ideas that seem promising. A model of learning is needed to evaluate what works and to communicate these findings. As we identify particularly effective instructional approaches from all the sources above, cognitive learning theory can provide a framework of understanding that will organize and explain what good teachers already know: all students are active learners engaged in a dynamic interaction with the forces in their environment, and with the right guidance, they can be taught strategies and helpful approaches that will allow them to take control of their own learning and continue to build knowledge and skills with increasing effectiveness.

An instructional program that incorporates much of what research shows is effective for active and strategic learning is the SpringBoard™ program developed by the College Board for students in middle school and high school. In the following review, a case is made that SpringBoard builds upon the research in cognitive learning theory as it embeds

well-researched strategic approaches to learning in a rigorous curriculum in English language arts and mathematics. SpringBoard draws upon the learning sciences to provide a flexible instructional program that enables teachers to differentiate instruction and engage a diverse population of students with varying levels of knowledge and skills and a variety of preferred learning styles.

First, a model of learning based on cognitive science is outlined with particular attention to the role of memory and language. The instructional framework of strategic learning that follows from this model provides the basis for the SpringBoard program's incorporation of rigorous content and training in strategic activities and skills. Finally, the research base for the SpringBoard program is reviewed and summarized, first for the program overall and then for each set of strategies incorporated in the instructional design: reading, writing, oral proficiency, collaboration, and problem solving.

Cognitive Models of Learning

Cognitive models of learning assume that individuals engage in a process of making meaning from the rich variety of stimuli they perceive as they encounter the world. All new information is perceived through the patterned schematic filter that, in educational terms, is referred to as a student's "prior knowledge." Cognitive learning is defined as the process of comparing, selecting, organizing, retaining, and reflecting on the new information as patterns of understanding are revised and adapted. According to the research, effective learners are characterized by the width and depth of the techniques

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available to them for use in this never-ending search for meaning and understanding. Because learners benefit from using strategies, researchers have attempted to identify what makes specific strategies effective for different learners across a wide variety of learning environments. Studies have been conducted with elementary school through college students, as well as older adults. Strategic approaches to learning have been researched with high-, low-, and general-ability students as well as groups of students who are learning a new language or have special needs (Rosenshine, Meister, and Chapman, 1996). Striking similarities have emerged across all the groups, with certain recurring findings that are consistent with the theoretical basis of cognitive learning theory. For the most part, strategies are effective and can be learned and utilized effectively by all students. Learners demonstrate significant differences in how they adopt, activate, and progress toward successful and automatic use of strategies, and these effects may often be explained through understandable differences in prior knowledge, opportunities to learn, and preferred learning styles (Case and Taylor, 2005; Hattie, Biggs, and Purdie, 1996).

Memory

Critical to cognitive learning theory is an understanding of the architecture of the human memory. Cognitive psychologists have distinguished between three levels of memory that appear to have distinct functions during the process of learning (Atkinson and Shiffrin, 1968; Butterfield, Hacker, and Albertson, 1996; Kirschner, Sweller, and Clark, 2005; National Research Council, 2000). Short-term memory has a limited capacity that restricts the amount of information that can be held at any one time. Facts and data stored in short-term memory are retained for only a short period without rehearsal and repetition. Working memory, also limited in its capacity to hold information, is the framework within which most manipulation and processing of information takes place. However, if the information is not integrated with the knowledge structures that organize long-term memory, knowledge degrades quickly and is lost.

The optimal instructional plan is flexible enough to allow differentiation in response to a student's capacity to apply existing strategies. Good instruction reflects an understanding of the procedures necessary to optimize the most effective cognitive "load" for each student during active learning. The goal of instruction is to "give learners specific guidance about how to cognitively manipulate information in ways that are consistent with a learning goal, and store the

result in long-term memory" (Kirschner et al., 2005). Many of the strategic learning processes that have been studied and have been found to be effective are designed to facilitate the "depth of processing" that makes these connections and restructures long-term memory to accommodate new understandings. Deeper processing of new information creates multiple associations with existing knowledge structures in long-term memory. A richer network of relevant associations supports increased retention and retrieval of new knowledge and skills. While information is being processed in working memory, existing understandings stored in long-term memory are activated; new information is analyzed, compared, modified, and connected to existing knowledge structures producing new understandings. If new information is not rapidly associated and incorporated into long-term memory, working memory reaches capacity and information processing begins to break down. This is the case when a learner is faced with a lot of unfamiliar information at one time and the learner has not had previous opportunities to develop helpful organizing structures—variously called schemata, frames, or episodes—that facilitate incorporating the new information into long-term memory (Butterfield et al., 1996).

The engine that drives this process is the dissonance that occurs when we are confronted with new facts, procedures, or concepts that don't slide easily into our existing knowledge framework. Our human response will be the urge to resolve the discrepancy and reconcile the new information. The most effective classrooms provide the challenges, opportunities, guidance, tools, strategies, climate, and successful experiences that will support students and help build the motivation to persist in this effort.

Language

Cognitive models of learning are inseparable from issues of language and language proficiency. All new information and experiences are filtered through the available communication tools. Academic language abilities define the parameters that configure thought and memory; allow new information to be perceived and comprehended through listening or written text; and enable new understandings to be discussed, elaborated, expressed, and summarized in oral and written forms. Many of the learning strategies that have been identified are related to building proficiency in some aspect of the use of language—reading, writing, speaking, and listening—in order to ensure effective processing of content concepts and skills into long-term memory (Chamot and O'Malley, 1994; Cummins, 1984).

The relationship between language proficiency and content understanding becomes even more critical and complex as students grow in the grade levels. In addition to the basic skills necessary for reading and writing in the early years, more sophisticated techniques must be utilized as core disciplinary concepts become more difficult to master and as the particular functional demands of the language associated with separate subject areas become more differentiated. Students need to know the rules that govern different genres of text as well as the particular vocabulary, grammar, forms, traditions, and styles of communication needed to excel in a subject area such as mathematics or science. Critical junctures occur throughout the educational trajectory where certain language skills and abilities must be present. For example, if not adequately prepared, students will fall behind in the upper elementary years as educational texts transition from the predominantly narrative form that is used to teach reading, to the expository format that is used to communicate content concepts. In other words, a critical milestone occurs when students are no longer *learning to read* and are expected to be competent in *reading to learn* (Pritchard and Breneman, 2000). This transition is often abrupt, unexpected, and frustrating for both students and teachers, particularly for those content-area teachers who have not incorporated instructional strategies designed to build literacy as well as subject-matter understanding.

In this context, the special needs of students who are learning English as a second language become more a matter of degree than of qualitative differences. Educational theorists who have examined programs particularly designed for language learners have used the research from cognitive psychology to find that the strategic learning approach is consistently effective (Chamot, Dale, O'Malley, and Spanos, 1992; Garcia, 2003; Gersten, Baker, Haager, and Graves, 2005; Reed and Railsback, 2003; Wiley and Deno, 2005). Chamot and O'Malley (1994) suggest four basic propositions from the research with native language speakers that they believe support the development of cognitive academic language across content areas for students who are learning a second language:

- **Active learners are better learners.** When students synthesize and organize new information and relate it to prior understandings they build cognitive linkages that improve comprehension and recall.
- **Strategies can be learned.** When students are exposed to positive learning experiences where strategies are applied effectively they retain more understanding than students who have not had similar exposure.
- **Academic language learning is more effective with**

learning strategies. English language learners will learn new language and concepts through the same principles that underlie acquisition of new skills and problem-solving techniques among native speakers of English.

- **Learning strategies transfer to new tasks.** Once the strategic expertise is acquired students will be able to apply the skills to new tasks that are similar to the learning activities they have experienced.

Strategic Learning Framework

Much of the energy and attention that has accompanied the strategic learning research is the result of the findings that strategies can be learned and effectively applied by a wide range of learners. Although the research on the transfer of strategies to new tasks is just beginning, the results are encouraging for those who are responsible for designing instructional programs.

According to Chamot and O'Malley (1994), strategic instruction is envisioned as an ongoing process with five general phases that shift the responsibility of the application and utilization of strategies from the teacher to the student. The role of the teacher and the instructional plan is critical in supporting the transition of responsibility to student control. As new content and new skills and tasks are encountered, the teacher first *prepares* the students by activating background knowledge. In phase two, the teacher *presents* the appropriate strategies, explains their use, and models the application of the technique related to the new content information. During the *practice* phase, the amount of guidance provided by the teacher can be adjusted to match the students' experience with the strategy or individual differences in the capacity to process information in working memory. Students are encouraged to become self-aware during the *evaluation* phase as they reflect on the success of the learning and strategic applications. Finally, the *expansion* phase encourages the transfer and application of the new techniques and abilities to new situations and tasks.

Consistent with cognitive theory, this transfer of responsibility is dependent on the students developing the ability to monitor, control, and regulate their own learning as teachers fade or withdraw the instructional supports or scaffolds. This ability to direct learning is exercised in two ways: automatically—in long-term memory as new skills are absorbed; and deliberately—in working memory as choices are made about the existing knowledge to tap and the strategies to apply.

Strategies and Content-Based Instruction

In characterizing the various strategic approaches, researchers distinguish between *cognitive*, *metacognitive*, and *affective* strategies. Cognitive strategies facilitate learning by providing general guides for information processing. Students may benefit even though they may not be self-aware as they utilize the technique. As self-regulation increases and control and monitoring of learning become deliberate, the student builds the capacity to choose from different approaches. Strategies that build this awareness through the discussion and written documentation of the thinking behind the choices are considered metacognitive. Affective strategies are those that deal with the feelings and human interactions that accompany and support the learning experience. Strategies that build motivation, feelings of efficacy, and collaborative skill can all be considered affective in nature.

All strategies share the instructional goals of facilitating the understanding of subject-matter content, building knowledge, and accomplishing conceptual change when needed. As such, they are most effective when embedded in an articulated instructional program where new strategies can be introduced over time following a sequence of increasing complexity, progressing in manageable steps with opportunities to repeat and elaborate on the skills being practiced (Wilson and Myers, 1999).

The instructional plan must provide for flexibility and differentiation in order to address the needs of all students. Most strategies work equally well for all students. However, flexibility is necessary in determining—for each student or groups of students—those approaches that have been mastered already and are under the control of the students' metacognitive processes and those that are still in need of practice and elaboration. In the optimal instructional situation, teachers can choose the best approach for students who learn in different ways as well as decide to increase or reduce the amount of guidance and the level of scaffolding to apply to specific instructional tasks. The strategic approach for a group of expert learners may be characterized by a higher level of student control and minimal guidance, while the classroom of younger, struggling, or novice learners may involve more direct instruction, explanation, and modeling of strategic activities by the teacher (Kalyuga, Ayers, Chandler, and Sweller, 2003; van Gog, Ericsson, Rikers, and Paas, 2005). Different classroom environments in this instructional context—characterized by collaboration, discussion, active read-

ing, writing, and various graphic or visual organizing activities—may appear very much the same to the outside observer regardless of the various learning levels within.

The SpringBoard Example

The College Board's recently developed SpringBoard program takes advantage of years of research in cognitive science to support the design of an instructional program in mathematics and English language arts that successfully engages all students in challenging learning experiences. The program meets the criteria for strategic instruction outlined above:

- Rigorous content, aligned to standards, has been carefully articulated in a scope and sequence that builds knowledge and skills incrementally from sixth grade through twelfth grade in both English language arts and mathematics. The content is mapped to standards that will prepare students, upon completion of the six-year sequence, with the level of knowledge, skills, and abilities necessary for success in Advanced Placement Program® courses and college.
- Embedded in each lesson, and at the discretion of the teacher, are numerous opportunities to introduce, model, and then practice and evaluate the application of research-based strategies in reading, writing, oral proficiency, collaboration, and problem solving. The strategies can be revisited and practiced throughout the entire articulated sequence across the grade levels, and the teacher version of the instructional materials signals which strategic approaches might be most appropriate for the task at hand, given the amount of student preparation and differences in learning styles.
- The instructional materials are grounded in real-world situations and are designed to be engaging and interactive, offering students the opportunity to master knowledge and skills in manageable steps, with tasks that require reading, writing, discussion, problem solving, collaboration, questioning, and elaboration.
- Standardized formative assessments with scoring rubrics are embedded in each lesson and, in addition, teachers have numerous opportunities to review student work, monitor student talk, and observe cognitive organization in action. Computer-based diagnostic assessments are available and can be used as is or can be customized by the teacher. The diagnostic assessment reports offer explanations for each incorrect response.

- Teachers are trained in the use of the model instructional units and strategies at professional development institutes and workshops that are designed to exemplify the strategic learning framework diagramed above. The program provides 24-hour access to materials, exemplary student work, as well as coaching and mentoring through a supporting online system.

The operational heart of the SpringBoard program is the extensive collection of model instructional units and lessons combined with the ongoing professional development and support offered to teachers in the program.

SpringBoard teachers are introduced to the strategies during the professional development institutes and workshops. SpringBoard staff developers model instruction using a subset of the lessons and units contained in the SpringBoard materials. The units used in training are selected in order to provide teachers with exposure to the variety of strategies that are embedded throughout the six levels of SpringBoard. The training is based on the same principles of strategic learning that make the instructional program powerful in the classroom. Prior knowledge is activated as the strategies are explained and then modeled for the participants. Teachers are given an opportunity to practice using the strategies as a component of the lessons being used as illustrations, while the staff developers coach and offer feedback. The process is repeated as the training continues and teachers are encouraged to continue to work with the training staff online between workshops. By experiencing the power of the strategic approach firsthand, teachers are able to envision the transfer of the process into the classroom.

The subject matter of each unit is academically quite rigorous and challenging, yet students of all ability levels are able to engage with and then master the content successfully through the utilization of the various strategies offered by the program. Each of the SpringBoard strategies has been chosen from the most effective classroom practices that have been time-tested by educators in instructional situations. Many of the strategic approaches have been researched through empirical and experimental studies as well.

SpringBoard Strategies

SpringBoard assists teachers and students in English language arts and mathematics by defining, explaining, and incorporating more than 60 separate cognitive, metacognitive, and affective strategies. For explanatory purposes, the strategies are organized into discrete groups, although there is considerable overlap in purpose and application:

- Reading strategies—23 separate strategic approaches are offered in SpringBoard
- Writing strategies—14 are offered
- Oral proficiency strategies—8 are offered
- Collaborative strategies—7 are offered
- Problem-solving strategies—9 are offered

Reading, writing, and collaborative strategies are suggested for the units in both English language arts and mathematics. Oral proficiency strategies are primarily included in the English language arts program and problem-solving strategies address the needs of mathematics. The strategies are listed in Table 1.

SpringBoard Reading Strategies Research

For decades educational researchers have been attempting to discover and document the most effective methodologies for helping students to become expert readers. In response to the advances in cognitive psychology, an ever-growing body of this research has been designed to test the effectiveness of specific cognitive strategies through experimental or quasi-experimental designs or has attempted to identify the strategic skills and abilities that characterize expert readers. Many of the reading strategies offered by the SpringBoard program have been examined in this research. For example, researchers Kim, Vaughn, Wanzek, and Wei (2004) found 21 studies since 1984 that looked at the effect of using various graphic organizers on the reading comprehension of students who were having difficulties with reading and found overall improvements.

Another popular area for study is the impact of teaching students to generate questions. Although experimental designs are rare in educational research, Rosenshine et al. (1996) were able to identify 26 studies that had both experimental and control groups and that looked at the effect on comprehension of having students generate questions from a text paragraph or passage. Consistently, students showed significant gains as measured by both standardized and experimenter-developed assessments.

Studies have examined the effect of the activation of prior knowledge (Duffelmeyer, 1994; McNamara, 2004; Paris and Oka, 1986; Pressley, Wood, Woloshyn, Martin, King, and Menke, 1992), of visualization (Clark, Deshler, Schumaker, Alley, and Warner, 1984; Rakes, Rakes, and Smith, 1995; Willoughby, Wood, and Khan, 1994), of reading and thinking aloud (Beck and McKeown, 2001; Magliano, Trabasso, and Graesser, 1999; Narvaex, van den Broek, and Ruiz, 1999), of summarizing and retelling (Carnine and Carnine, 2004; Jitendra, Hoppes, and Xin, 2000; Thiede and Anderson, 2003),

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Table 1

SpringBoard Strategies

<i>Name of Strategy</i>	<i>ELA</i>	<i>Math</i>	<i>Name of Strategy</i>	<i>ELA</i>	<i>Math</i>
Reading Strategies			Oral Literacy Strategies		
Anticipation Guide	X		Choral Reading	X	
Chunking the Text	X	X	Debate	X	
Close Reading	X		Drama Games	X	
Dialectical Journal	X		Presentation	X	
Graphic Organizer	X	X	Oral Interpretation	X	
Guided Reading	X		Oral Reading	X	
Interactive Reading Guide	X		Rehearsal	X	
K-W-L Chart ¹	X	X	Role Playing	X	
Marking the Text	X	X	Collaborative Strategies		
Predicting	X		Fishbowl	X	
Previewing	X		Figural	X	X
Questioning the Text	X	X	Literature Circles	X	
Quickwrite	X		Performance	X	
Read Aloud	X	X	Think-Pair-Share	X	X
Skimming/Scanning	X		Group Presentation		X
Summarize/Paraphrase/Retell	X	X	Debriefing		X
Think Aloud	X	X	Problem-Solving Strategies		
Visualizing	X	X	Act Out the Problem		X
Activate Prior Knowledge	X		Draw a Sketch		X
RAFT ²	X		Guess and Check		X
PACA ³		X	Identify a Subtask		X
TP-CASTT ⁴	X		Look for a Pattern		X
SOAPStone ⁵	X		Make a Table or an Organized List		X
Writing Strategies			Simplify the Problem		X
Dialectical Journal	X	X	Work Backward		X
Frame Poem	X		Write a Number Sentence		X
Graphic Organizer	X	X			
Manipulatives	X	X			
Modeling	X				
Outlining	X				
Quickwrite	X	X			
Revisiting Prior Work	X				
Self-Editing/Peer Editing	X	X			
Timed Writing	X				
Transformation of Text	X				
Visual/Auditory Prompt	X				
Writing Process	X				
RAFT	X	X			

¹ K-W-L = What I ... Know, What to Know, Learned

² RAFT = Role, Audience, Format, Topic

³ PACA = Predicting and Confirming Activity

⁴ TP-CASTT = Title, Paraphrase, Connotation/Denotation, Attitude, Shift, Theme, Title

⁵ SOAPStone = Subject, Occasion, Audience, Purpose, Speaker, Tone



and of chunking text material (Casteel, 1990). The research has looked at the immediate impact of the strategies as well as transfer of the skills to new situations across the content areas. Studies have also examined the effects for high- and low-ability students and found improvements at all levels.

SpringBoard Writing Strategies Research

Reading and writing abilities often benefit from the same strategies. Writing becomes the visible evidence of comprehension, and some educational researchers have focused on the strategic approach in order to offer suggestions for improvements to writing skills. Gersten and Baker (2001) summarized the research on improving the writing skills of students experiencing difficulties in a meta-analysis. They identified 13 studies that looked at the impact of strategic interventions and that also used an experimental or quasi-experimental design. They found a moderately strong average-effect size across all of the studies indicating substantial benefits from the interventions. Consistently, students needed to be instructed in the steps that were critical in producing an effective written work. For example, in one of the studies examined in the meta-analysis, Englert, Raphael, Anderson, Anthony, and Stevens (1991) found that expository writing improved in high-achieving students, low-achieving students, and students with learning disabilities after training in the writing process (prewriting/planning, drafting, revising, editing, and publishing). Graham and Harris (2005), in a series of studies over 20 years, found that if students were introduced to planning strategies as part of the writing process their knowledge about writing, their motivation to write, and the quality of their writing all improved. When students were asked to revisit their prior work and think about comprehensibility from the perspective of the audience for the piece, they were able to edit and revise more effectively (Beal, 1996).

SpringBoard Oral Proficiency Strategies Research

Oral proficiency is important in classroom discourse as well as outside the classroom, but the importance goes beyond basic conversational skills. There is evidence that oral and written language processes develop together and, as a result, improvements in oral language may have an immediate benefit for writing. Oral strategies such as story retelling, think-pair-share, and role playing provide a direct bridge to improved writing skills (Brice, 2004). Margaret Cook (2009) examined the effect

of role-play with elementary students of varying abilities: high, average, and low. She found that children at all levels grew in social and cognitive skills as well as in technical vocabulary and writing ability. When adolescents were encouraged to elaborate on texts with role-play, student engagement and comprehension improved (Zigo, 2001). Educators have long relied on oral reading in the hopes of building language fluency, and oral reading strategies may be categorized according to the level of independence required of the student. Carbo (1993) offered a continuum that ranged from shared reading—listening to the teacher read—to sustained silent reading, a completely independent activity. In this framework, choral reading becomes an intermediate strategy where a small group of students read together and learn from each other. McCauley and McCauley (1992) examined the choral reading strategy with second language learners and found improved comprehension of the text. In addition to the cognitive benefits, the researchers indicated that students were also assisted by the low-anxiety environment that choral reading created. Thus, choral reading became a cognitive and affective strategy.

SpringBoard Collaborative Strategies Research

Educational theorists differ in the amount and character of the social interaction that is considered necessary for an effective transformation of prior knowledge into correct understanding, but the recognition that learning is fundamentally an interactive social activity has become generally accepted. As such, the decision to structure a classroom to facilitate collaborative group work and enhance the interactions required for learning is initially a teacher responsibility. However, the decision to ask for help from peers, or to combine with others for study and discussion and thereby realize the cognitive and affective benefits of collaboration, can certainly become a metacognitive strategy that is under student control (Palincsar, 2003). Researchers have examined structured collaboration in different forms and found positive outcomes for students in academic performance and attitudes. Carroll and Leander (2001) looked at the impact of graphic organizers, questioning, and cooperative learning and found improvements in comprehension and grades as well as a reduction in off-task behaviors.

One collaborative strategy that emerged from social psychological research is the jigsaw approach, structured to make students dependent on each other for critical pieces of knowledge in an equal-status, interdependent environment. The approach has been well researched over the years, with

changes being made to the process along the way. Jigsaw has been studied with students at every level, from elementary school through college, and has consistently been shown to have a positive impact on student learning as well as social skills (Holliday, 2002; Lee, Ng, and Jacobs, 1997; Perkins and Saris, 2001; Zales, 1998).

SpringBoard Problem-Solving Strategies Research

In addition to the strategies in all of the areas above, SpringBoard offers teachers of mathematics particular assistance in the area of mathematical problem solving. Much of the research in this area makes reference to the seminal work of Polya (2004), whose book *How to Solve It* was published originally in 1945. Subsequent researchers and theorists have built upon the foundation proposed in his original work, but the four-step problem-solving process he proposed has remained recognizable throughout:

1. Read and understand the problem
2. Develop a strategy for solving the problem (a heuristic)
3. Carry out the strategy or plan. Show your work. Justify your answer.
4. Look back and check to see that the solution seems reasonable.

Step one is dependent on mathematical literacy in reading and comprehension—a justification for incorporating techniques for building proficiency in all aspects of language. Most of the problem-solving strategies that are offered by the SpringBoard program fit into steps two and three above. Researchers have studied the effect of teaching the problem-solving strategies to students and found significant improvements in their mathematical achievement (Collins, Brown, and Holun, 1991; Eshel and Kohavi, 2003; Ives and Hoy, 2003; King, 1991; Kroesbergen and Van Luit, 2003; Ostad, 1998; Pape, Bell, and Yetkin, 2003; Pugalee, 2004).

Discussion and Summary

Cognitive models of learning provide a useful framework for informing the design of an optimal instructional system. The framework incorporates decades of research on memory, information processing, and the social organization of the educational process. When learning environments that have been designed to facilitate language proficiency, cognitive processing, and the growth of metacognition are compared to

more traditional or transmissive approaches, the advantages are clear—all students do better, and, in some instances, the benefits are dramatic (Anderson, 2002; Hamilton, McCaffrey, Stecher, Klein, Robyn, and Bugliari, 2003; Hmelo-Silver, 1998; Marzano, Pickering, and Pollock, 2001; Ruby, 2002; Schwartz and Martin, 2004; Stigler and Hiebert, 2004).

As a comprehensive instructional program in English language arts and mathematics, SpringBoard reflects powerful, research-based understandings about how people learn. The potential for serious engagement in the learning process by all students is enhanced by the strategic learning methodology incorporated throughout the program. All of the elements necessary for long-term skill and knowledge development in both students and teachers are envisioned as components of the system:

- Rigorous, flexible, research- and standards-based instructional materials
- A wealth of strategic approaches—cognitive, metacognitive, and affective
- Ongoing support for teacher professional development
- A commitment to inclusion and differentiation for all levels of student abilities and learning styles
- A sensitivity to real-world connections and the affective and cultural needs of a wide variety of student populations

The foundational instructional element of the SpringBoard program is the recognition that in order for students to truly incorporate rigorous new information so that it may be used and transferred to new situations, the pedagogy must reflect strategic techniques that facilitate depth of processing and comprehension. Strategies work because they structure the cognitive manipulation of information in a way that changes the architecture of the memories in the human brain. They work because they can be learned and brought under the control of the learner so that future information is easier to absorb. If the environment of the classroom does not allow for this interchange between the flow of information and the need of the student to process, practice, reflect, and integrate new ideas through language and experiences, learning stops. Exemplary learning programs such as SpringBoard are designed to provide the support that teachers need in order to empower all students to meet new educational challenges with skill, enthusiasm, motivation, and confidence.

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SPRINGBOARD LONGITUDINAL EVALUATION

REPORT 2008

EXECUTIVE SUMMARY



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**SPRINGBOARD LONGITUDINAL EVALUATION
REPORT 2008
EXECUTIVE SUMMARY**

Introduction

The following Executive Summary presents the findings from a comprehensive longitudinal evaluation of the College Board's SpringBoard (SB) program that is conducted by the Westat organization. The design includes three major components: A system-wide teacher survey comparing SpringBoard and non-SpringBoard teachers and designed to assess implementation patterns; case studies of selected SpringBoard districts and schools; and a preliminary analysis of student achievement related to SpringBoard participation in selected districts. This report presents the results from the survey and student achievement research components.

Characteristics of the SpringBoard Program

The recently developed SpringBoard program takes advantage of years of research in cognitive science to support the design of an instructional program in mathematics and English language arts that engages all students in challenging learning experiences. The SpringBoard instructional system combines rigorous course work with assessment and professional development. Each course centers on classroom-tested Model Instructional Units that prepare students for AP® and college-level work.

Instructional Materials for Teachers and Students: Rigorous content, aligned to standards, has been carefully articulated in a scope and sequence that builds knowledge and skills incrementally from sixth grade through twelfth grade in both English language arts and mathematics. The content is mapped to the College Board Standards for College Success and state standards, with the goal to prepare students, upon completion of the six year sequence, with the level of knowledge, skills and abilities necessary for success in college and Advanced Placement courses. Embedded in each lesson, and at the discretion of the teacher, are numerous opportunities to introduce, model and then practice and evaluate the application of research-based strategies in reading, writing, oral proficiency, collaboration and problem-solving.

Assessments: Standardized formative assessments with scoring rubrics are embedded in each lesson and, in addition, teachers have numerous opportunities to review student work, monitor student talk, and observe cognitive organization in action. Online diagnostic assessments composed of high-quality test items, written specifically for SpringBoard by the College Board's Test Development Group, can be found sequenced within the online table of contents for each level and course. The diagnostic assessment reports offer explanations for each incorrect response.

Professional Development: The professional development resources include administrators' workshops and toolkits, required summer institutes for first-year teachers, advanced training, and an online Professional learning community. Premium training services are also available.

SpringBoard® Online: Includes instructional resources, customizable online assessments, and correlations to state standards and most textbook programs. It's also the home of the program's online Professional learning community

Overview of the Evaluation

The SpringBoard longitudinal evaluation is designed to determine the efficacy of the program. The evaluation questions being addressed are:

1. Are teachers in SpringBoard classrooms more likely than teachers in non-SpringBoard classrooms to exhibit high expectations for all students? Do the SpringBoard teachers feel better prepared to assist their students?
2. Do students in SpringBoard classrooms demonstrate higher rates of achievement than what could be expected were they not in SpringBoard classrooms? Do students in SpringBoard classrooms demonstrate higher rates of achievement than comparable students in non-SpringBoard classrooms?
3. What student, teacher, classroom, school, and/or district characteristics and program implementation patterns are most likely to be associated with favorable vs. non-favorable outcomes?

The first year of the evaluation was a planning year. This report covers the evaluation activities conducted during the second year of the evaluation from September 2006 through January 2008. The following sections describe the methodology and results from the three major research activities during this period: A system-wide teacher survey, case study site visits in seven SpringBoard districts, and student achievement analyses using annual test score data from a subset of SpringBoard districts. The report covers the teacher survey, the student achievement analyses and the findings associated with them, in the sections to follow.

System-wide Teacher Survey

Sample Population

The survey sample had two components: teachers who participated in SpringBoard, and teachers from comparable schools that did not participate in SpringBoard. Both sets of teachers were selected in two steps: first by selecting samples of schools, and next by selecting teachers within those schools. The sampling frame for the SpringBoard sample consisted of a list of 6,333 teachers in 479 schools who participated in the SpringBoard training program in 2005 and/or 2006. From this list, 100 middle schools and 106 high schools were selected through stratified sampling, using enrollment size, poverty level, and urbanicity to define the strata. A total of 948 SpringBoard teachers were selected, roughly evenly split between middle schools and high schools, and between English and mathematics. The comparison school frame consisted of all schools that had not participated in SpringBoard but were in districts with SpringBoard schools. This resulted in a frame with 584 high schools and 1,076 middle schools.

A total of 846 comparison teachers were selected, roughly evenly split between middle schools and high schools, and between English and mathematics.

Of the final eligible sample of 780 SpringBoard teachers, 357 responded, resulting in a response rate of 38 percent. Among the comparison teachers, the original sample of 846 was reduced to 736 eligible teachers; 241 responded, resulting in a response rate of 28 percent. The overall response rate across both groups combined was 33 percent.

Survey Instrument

The teacher questionnaire had two major sections and several sub-sections. Both SpringBoard teachers and non-SpringBoard teachers completed Part I. In this section, teachers were asked to agree or disagree with twenty-eight attitude and opinion statements concerning conditions in their school. Both groups also answered demographic and experience questions. Only SpringBoard teachers received Part II which consisted of four sections: general questions and statements about the implementation of SpringBoard, specific ELA related questions, specific mathematics-related questions, and questions about materials, training and support.

Survey Findings – SpringBoard Teachers Compared to Non-SpringBoard Teachers

SpringBoard teachers were very similar to non-SpringBoard teachers in their responses to questions about their school and their colleagues. Over 90% of the respondents from both groups indicated that they agreed or strongly agreed that their fellow teachers...

- Set high standards for themselves
- Have subject matter knowledge
- Use strategies for high student achievement

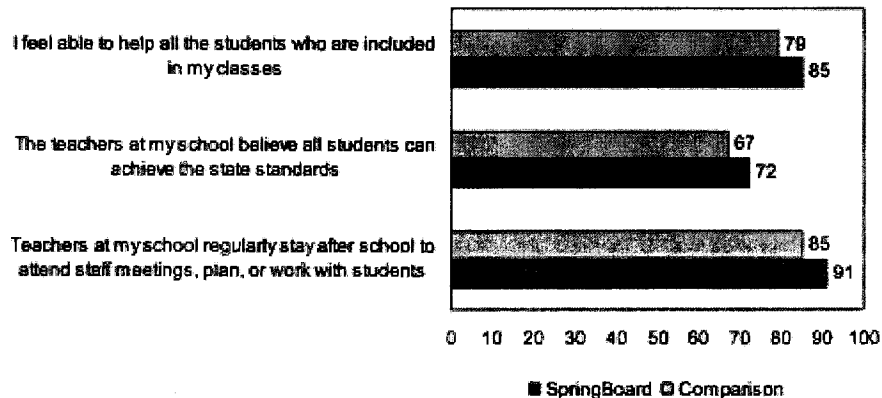
Over 80% of the teachers agreed or strongly agreed with the following positive statements about their schools:

- My school is a good place to work
- I would recommend this school to parents seeking a place for their child
- A climate of mutual respect exists among the staff at my school
- I have confidence in my principal as the instructional leader of the school
- My school's administrators provide me with support when I need it

There were differences between the SpringBoard and comparison teachers, however, when they were asked to indicate their agreement with statements about students. Although more than 90% of both groups agreed that the teachers in their school set high standards for students, as Figure 1 illustrates, SpringBoard teachers were 5% or more likely than non-SpringBoard teachers to agree or strongly agree with the following statements:

- Teachers at my school regularly stay after school to attend staff meetings, plan, or work with students
- The teachers at my school believe all students can achieve the state standards
- I feel able to help all the students who are included in my classes

Figure 1: Percent of Teachers Who Agreed or Strongly Agreed with Statements About Students

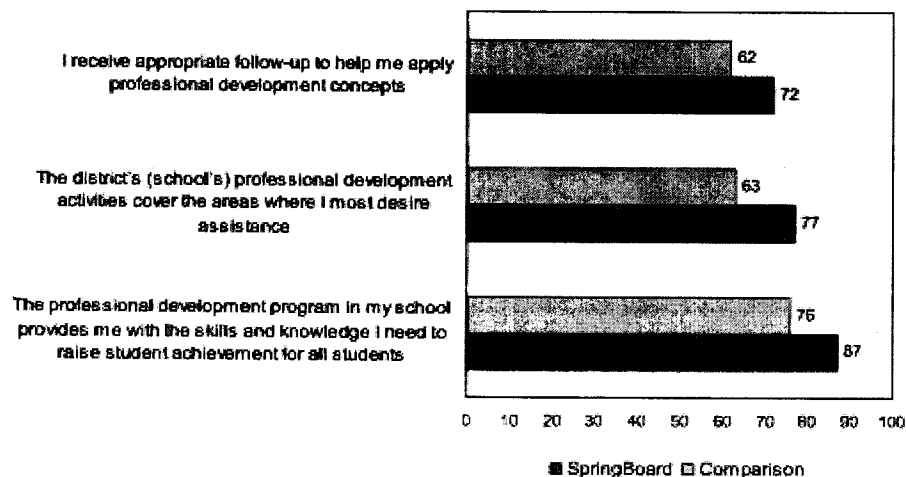


The two groups also differed when they were asked about instructional resources and professional development. Comparison teachers were more likely than SpringBoard teachers to indicate that they had the resources they needed to meet the needs of their students, including in particular the appropriate assessments and the required computer capabilities. In the area of professional development, over 90% of the teachers in both groups agreed or strongly agreed that they were provided with opportunities to participate in professional development. The SpringBoard teachers, however, were about 10% more likely to agree that...

- The professional development program in my school provides me with the skills and knowledge I need to raise student achievement for all students
- The district's (school's) professional development activities cover the areas where I most desire assistance
- I receive appropriate follow-up to help me apply professional development concepts

The percentages are presented in the following figure:

Figure 2: Percent of Teachers Who Agreed or Strongly Agreed with Statements About Professional Development



Survey Findings – SpringBoard Implementation

Across the many survey items in Part II, the section offered only to SpringBoard teachers, several consistent findings emerged.

Program Effectiveness and Quality

- Teachers largely considered SpringBoard to be very or somewhat effective across a wide variety of students. Among teachers who worked with special populations, 80% or more saw SpringBoard as effective with high achieving students, average students, students from low-income families, inner-city students, and suburban students. More than 70% of all of the ELA teachers saw SpringBoard as effective with English learners and Special Education students.
- Teachers felt that the SB materials are age appropriate (84%), are flexible (85%), are culturally appropriate (82%) and involve higher order thinking skills (92%)
- More than half of the ELA teachers saw improvement in students' reading comprehension (63%) and writing skills (56%) that they attributed to SpringBoard.
- Teachers widely agreed (95%) that the SpringBoard training offered by the College Board was sufficient to enable them to use the Model Instructional Units and strategies effectively, although only 58% agreed that the training for the online component was sufficient.
- Teachers were in agreement that SB teaching strategies are effective (87%) and that SpringBoard had changed the mix of strategies they used. Some indicated they also used the strategies in content areas other than English and mathematics.

Needs improvement

- Among the ELA teachers, 86% considered it a minor to serious problem that SB ELA did not contain vocabulary, and 90% indicated it was a minor to serious problem that the curriculum did not address grammar. 74% also considered it a problem that SB did not provide the ancillary materials (DVDs, novels, CDs) that the lessons required.
- About 50% of the responding SB mathematics teachers considered it at least a minor problem that SB did not contain: suggestions for “direct instruction” outside of the MIUs, reference to monitored practice, self-reflection for students involving specific mathematical content, and separate embedded assessments that assess transfer of learning to new contexts.

Patterns of Use

- The English/language arts program was most often used as the core instructional program (50% ELA compared to 4% math), while the mathematics program was primarily used as a supplement to the main text (37% ELA compared to 83% math).
- Teachers tended to use SpringBoard assessments on an occasional basis. The teachers were more likely to use the embedded assessments than the diagnostic assessments. Both the diagnostic and embedded assessments were used most often as feedback to students (46% used diagnostic, 69% used embedded.) Few teachers used the diagnostic assessments to determine grades (20%) but more than half used the embedded assessments summatively for grading (57%)

Program Alignment and District Support

- A majority indicated that SB was aligned with the district curriculum (78%), the state standards (83%), and the state testing program (68%). In areas where the alignment was less clear, this became a factor in selectively purchasing one content area or another.
- About half of the teachers were provided time to meet to discuss SpringBoard, although about two-fifths had access to an instructional coach.
- More than half of the teachers (53%) disagreed that their school had enough computers for a whole class to use the SB online component at one time and an even larger majority (65%) disagreed that it was easy to arrange a time to use the school’s computers.

Preliminary Analyses of the Student Achievement Impact of SpringBoard

Sample Population

A subset of 13 districts was selected from the total population of SpringBoard participants based on the available information about implementation and in order to provide a regional cross section of the SpringBoard community. Westat requested student achievement data from the selected districts with mixed success. Some of the selected districts were not able to provide student-level data because of privacy restrictions or limitations in their programming resources.

Exhibit 2.	Notice of Denial
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2



Each Child, Every Day

Board Members

Dr. Donna Mills, Chairman
Kathryn Hensley, Vice Chairman
Debbie Hawley
Carol A. Hilson
Troy Ingersoll

Superintendent

E. Wayne Gent

October 1, 2015

Erika Rains
Somerset Academy, Inc.
501 NW University Blvd.
Port St. Lucie, FL 34986

Via Certified Mail Return Receipt No.
7014 1200 0000 6472 9852 and
FedEx Airbill No. 8066 0118 1396

Office of Independent Education and Parental Choice
Florida Department of Education
325 West Gaines St.
Tallahassee, FL 32399

Via Certified Mail Return Receipt No.
7014 1200 0000 6472 9869 and
FedEx Airbill No. 8066 0118 1400

Re: Notice of Denial in Accordance with Section 1002.33(b)3.c., Fla. Stat. (2015);
Charter School Application Submitted by Somerset Academy, Inc. for
Somerset College Prep Academy Middle School

Dear Ms. Rains:

This letter shall serve as notice pursuant to Section 1002.33(b)3.c., Fla. Stat. (2015), that on September 22, 2015 the School Board of St. Lucie County, Florida ("School Board") denied the charter school application submitted on August 3, 2015 by Somerset Academy, Inc. ("Somerset") for the Somerset College Prep Academy Middle School. The School Board held a public hearing on September 22, 2015 where it considered the application and other materials submitted by Somerset, the Superintendent's recommendation, and public comments. Based on the evidence before it, the School Board determined that there was clear and convincing evidence that Somerset's application did not materially comply with the criteria and requirements set forth in Section 1002.33, Fla. Stat. (2015). The School Board's vote was a unanimous 5-0 vote to deny the application.

The specific reasons supporting the School Board's denial are set forth in the Memorandum dated September 14, 2015, from Johnathan A. Ferguson, Executive Director of Legal Services, to the School Board (attached hereto as Exhibit "A" and incorporated herein by this reference) and the Florida Charter School Application Evaluation Instrument – High Performing Replications dated September 14, 2015 and completed by Dr. Kathleen McGinn, Executive Director of Strategic Planning (attached hereto as Exhibit "B" and incorporated herein by this reference). The Evaluation Instrument was completed by Dr. McGinn on behalf of and based on the input of the School Board's charter school application staff review committee as specified in School Board Policy 3.90.

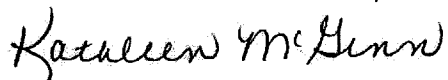
Somerset may appeal the School Board's denial by filing an appeal with the Florida Department of Education within thirty (30) calendar days of Somerset's receipt of this notice in accordance with Section 1002.33(6)(c)1., Fla. Stat. (2015) and Fla. Admin Code R. 6A-6.0781. All future notices to



Notice of Denial to Somerset Academy, Inc.
c/o Erika Rains
October 1, 2015
Page 2 of 2

the School Board should be provided to Dr. Kathleen McGinn, Executive Director of Strategic Planning, School Board of St. Lucie County, 4204 Okeechobee Rd., Fort Pierce, FL 34947.

Sincerely,



Kathleen McGinn, Ph.D.
Executive Director of Strategic Planning

Enc.

Cc: E. Wayne Gent, Superintendent, w/out enc.
Daniel Harrell, School Board Attorney, w/out enc.
Johnathan A. Ferguson, Executive Director of Legal Services, w/out enc.

2A

2.A.

Memorandum to School Board



MEMORANDUM

To: School Board

From: Johnathan A. Ferguson
Executive Director of Legal Services

Cc: E. Wayne Gent, Superintendent

Date: September 14, 2015

Re: Somerset Academy, Inc. – Charter School Application dated July 30, 2015:
Somerset College Prep Academy Middle School

I. OVERVIEW

Somerset Academy, Inc. ("Somerset") submitted a Model Florida Charter School Application – High Performing Replications ("Application") to the School Board of St. Lucie County ("School Board" or "School District") to open and operate a charter school pursuant to Section 1002.33, Fla. Stat. The proposed charter school, Somerset College Prep Academy Middle School ("College Prep Middle School"), would open in August 2016 and would serve grades 6 – 8. Somerset submitted the application pursuant to Sec. 1002.331, Fla. Stat., which allows "[a] high-performing charter school [to] submit an application pursuant to s. 1002.33(6) in any school district in the state to establish and operate a new charter school that will substantially replicate its educational program." Sec. 1002.331(3)(a), Fla. Stat. Somerset is proposing to open College Prep Middle School as a replication of the existing Somerset Academy Middle School #06-5151 ("School #5151") which is located in Broward County.

The Application is reviewed pursuant to the standards and criteria set forth in Sec. 1002.33, Fla. Stat. and in accordance with the Florida Charter School Application Evaluation Instrument – High Performing Replications ("Evaluation Instrument") as adopted by the Florida Department of Education ("Department"). The Evaluation Instrument sets out 20 standards to be reviewed which are based on the standards set forth in Sec. 1002.33, Fla. Stat. The School District then determines after a review of the application; an interview with the charter school's board members; and consideration of all subsequent materials provided by the applicant, whether the applicable section of the application: 1) meets the standard; 2) partially meets the standard; or 3) does not meet the standard.

The Department has established the following definitions for rating the standards in the Evaluation Instrument:

EXHIBIT

A

- 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.

In addition, because this is an application to replicate a high performing charter school, the School District may not deny the application unless the School District demonstrates by clear and convincing evidence that the application did not materially comply with the statutory requirements as outlined in the Evaluation Instrument. Sec. 1002.33(6)(b)3.b., Fla. Stat. Clear and convincing evidence is "a standard which requires more proof than a preponderance of the evidence but less than beyond and to the exclusion of a reasonable doubt. ... The evidence must be of such weight that it produces in the mind of the trier of fact a firm belief or conviction, without hesitancy, as to the truth of the allegations sought to be established." *In re Watson*, 40 Fla. L. Weekly S354 (Fla. June 18, 2015). Finally, "[m]aterial noncompliance is a failure to follow requirements or a violation of prohibitions applicable to charter school applications, which failure is a quantitatively or qualitatively significant either individually or when aggregated with other noncompliance." Sec. 1002.33(6)(b)3.b., Fla. Stat.

II. SUMMARY

The Application was reviewed by an evaluation team headed by Dr. Kathy McGinn. The team was made up of School District staff with expertise in the various areas to be reviewed. In addition, Somerset was asked to provide additional written materials pursuant to a public records request and they were given an opportunity to address questions and concerns at an in person interview of their board members. Based on all of materials submitted and the information gleaned from the board member interview, Dr. McGinn prepared the Evaluation Instrument in accordance with the guidelines set forth above.

In short, the Application does not support a finding by the School Board that College Prep Middle School embraces or encourages the use of innovative learning methods or that the Application meets the standard for a sufficient number of the evaluation criteria set forth in Sec. 1002.33, Fla. Stat. Furthermore, there is clear and convincing evidence that the Application failed to quantitatively

and qualitatively comply with the statutory requirements needed to be met in order to approve the Application. Therefore, the recommendation is that Somerset's Application for College Prep Middle School be denied.

III. DETAILED ANALYSIS

A. Introduction

While charter schools are by definition "public schools" they are held to a higher standard in that they "shall fulfill the following purposes: 1. Improve student learning and academic achievement. 2. Increase learning opportunities for all students, with special emphasis on low-performing students and reading. 3. Encourage the use of innovative learning methods. 4. Require the measurement of learning outcomes." Sec. 1002.33(2)(b)1.-4., Fla. Stat. These broad principles are further refined and expanded on in the application requirements set forth in Sec. 1002.33(6)(a), Fla. Stat. Specifically, the Application must demonstrate and include: how the school will meet the statutorily defined purpose of a charter school; provide a detailed curriculum plan aligned to state standards; contain detailed goals and objectives for improving student learning; describe the reading curriculum and differentiated strategies for students at different reading levels; contain a sustainable annual financial plan that supports the operational plan; and contain such other information as the School District might require.

A replication application must also comply with the additional criteria identified in Sec. 1002.33(6)(b)3.b.(I) through (V). Specifically, subsection (I) requires the application to meet the criteria set forth in subsection (6)(a) set forth above; subsection (II) requires the application to materially comply with subsections (9)(a)-(f); subsection (III) requires the applicant to demonstrate that the proposed charter school substantially replicates the existing high performing charter school; subsection (IV) requires a finding that the application does not contain a material misrepresentation or false statement or concealed an essential material fact during the application process; and subsection (V) requires the educational program and financial management practices to materially comply with the application criteria.

Subsections (9)(a)-(f) are important because they dictate, among other things, that a charter school must generally admit all students who reside in the school district; that it may not charge fees not charged by other public schools; that it "shall meet all applicable state and local health, safety and civil rights requirements;" and that it "shall not violate the anti-discrimination provisions of s. 1000.05." For purposes of subsection (III), "[a]n applicant is considered to be replicating a high-performing charter school if the proposed school is *substantially similar* to at least one of the applicant's high-performing charter schools and the organization or individuals involved in the establishment and operation of the proposed school are *significantly involved* in the operation of' the replicated school. (emphasis added) Sec. 1002.33(6)(b)3.b., Fla. Stat.

The Evaluation Instrument provides a detailed analysis of whether the Application met, partially met or did not meet the criteria outlined above. The following is a summary of each Evaluation Instrument section and the determination for each section.

B. Evaluation Instrument (section references are aligned with the Evaluation Instrument)

I. Replication

By Somerset's own admissions, College Prep Middle School is not replicating School #5151. For example, the Application states that "the one central common thread is that each and every Somerset school is unique and different. Each school serves a different population and demographic, and has students with different needs. The Somerset schools meet each student's needs in the way that is best for that student. Therefore, there is no specific design replication to any of our schools." Furthermore, and again by Somerset's own admissions, it is clear that the school based administrators at School #5151 will not be significantly involved with College Prep Middle School. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

II. Education Plan

1. Mission, Guiding Principles and Purpose

Somerset does not provide sufficient details to show how it will meet the charter school guiding principles or satisfy the required charter school purposes. The Application only contains generalities and does not indicate how College Prep Middle School will be innovative and offer something different from the other middle schools already serving the same students that it will target. In addition, College Prep Middle School's mission statement is not the same as School #5151's mission statement. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

2. Target Population and Student Body

Somerset does not provide sufficient information in the Application to indicate that it understands the target student population or how it plans on replicating School #5151 when the demographic make-up of College Prep Middle School and School #5151 will be markedly different. The future plans for targeting discreet student populations were imprecise and may include impermissible enrollment criteria. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

3. Education Program Design

Somerset does not explain in a clear and coherent fashion the education program design or how it is similar or replicates the education program design at School #5151. For example, Somerset states

that it will use an innovative approach in its education programs but offers no details or explanation as to what that means. Furthermore, there is no information as to how School #5151's education program is innovative or how it will be replicated at College Prep Middle School. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

4. Curriculum Plan

Somerset's curriculum plan for College Prep Middle School is unclear and internally inconsistent. Furthermore, there is insufficient information about School #5151's curriculum plan so it is impossible to confirm that College Prep Middle School's curriculum plan is aligned with School #5151's curriculum plan. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

5. Student Performance, Assessment and Evaluation

Somerset's stated expectations for College Prep Middle School's students do not align with the performance of students at School #5151 and do not align with the guiding principles that charter schools are required to meet. In addition, it is not clear that Somerset fully understands the necessary testing and assessment regimes. For example, Somerset doesn't demonstrate an understanding of the difference between Annual Measureable Objectives (AMO) and measures of proficiency and learning gains on state assessments. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

6. Exceptional Students

Somerset does not clearly define the students with disabilities that it intends to serve but there is information in the Application to indicate that they will not be serving students with moderate to severe disabilities. Furthermore, the staffing plan and budget included in the Application clearly indicates that there will be very few services offered for students with disabilities. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

7. English Language Learners

Somerset adequately addresses English language learners and, therefore, *meets* this standard.

8. School Climate and Discipline

Somerset includes dismissal procedures that are inconsistent with School District policies. These include, for example, dismissal based on the student failing to maintain a 2.0 gpa. School #5151 does not have the same gpa requirement for enrollment or dismissal. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

III. Organizational Plan

9. Governance

There are serious deficiencies in Somerset's governance plan. For example, four members of the nine person Somerset Board ("Board") live outside of Florida, including the Board Chair. The Board is responsible for overseeing and operating over 40 schools in six Florida counties, three states and the District of Columbia with no identified administrative support. The Board is subject to the Sunshine Law and, therefore, must conduct all business in the sunshine yet it has no administrative support to carry out the statutory duties and responsibilities imposed on charter school boards. It is difficult to conceive how the Board who meets once a month can perform its legally required functions. For example, the Board is responsible for evaluating each school's principal, yet there is no indication in any Board meeting minutes for the last year that those evaluations took place within the confines of the Sunshine Law. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

10. Management

Somerset's inability to effectively govern is closely related to the lack of an effective management structure. As noted in the governance section, Somerset has no administrative staff to assist with the day to day operations of each of its schools. Somerset claims to rely heavily on the principal and other school based administrators to manage the day to day affairs. College Prep Middle School's staffing plan for the first year shows a half time principal and no other administrative support such as assistant principals, deans, guidance counselors or the like. Somerset appears to delegate most if not all of its statutorily required management functions to the Education Service Provider ("ESP"), Academica Corporation ("Academica"). Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

11. Education Service Provider

Somerset indicates the Academica will be the ESP. The Application states that "[t]he Board analyzed data regarding several ESP's currently working with charter schools in Florida and concluded that the ESP chosen offered the most competitive price and had a proven track record of success." This appears to be a material misrepresentation as there is no evidence, despite requests for such material, that any other ESP was considered. In fact, the evidence indicates that for all intents and purposes Somerset Academy, Inc. and Academica are essentially one and the same. For example, Academica's Chief Financial Officer signs Somerset Academy, Inc.'s IRS Form 990. By signing Somerset Academy, Inc.'s Form 990, Academica's CFO is swearing that she is the "officer of the organization who, regardless of title has ultimate responsibility for implementing the decisions of the organization's governing body, or for supervising the management, administration or operation of the organization." Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

12. Employment

Somerset adequately addresses most of the criteria in this section except that Somerset's professional development plan does not provide any detail as to how teachers will receive specific training to ensure implementation with fidelity of the teaching strategies and instructional content ultimately chosen. Therefore, Somerset *partially meets* the standard.

13. Student Recruitment and Enrollment

Somerset's enrollment and admissions process may not be in accordance with applicable law because of the lack of specificity on how applications from students with disabilities will be handled. Therefore, Somerset *partially meets* the standard.

IV. Business Plan

14. Facilities

Somerset is proposing that College Prep Middle School share a new facility with the existing Somerset College Prep Charter High School ("College Prep High School"). The new facility has received site plan approval from the City of Port St. Lucie but construction has not begun. If the new facility is not finished prior to the proposed start date, Somerset is proposing that College Prep Middle School would operate out of portable structures located on the College Prep High School site. There were no details provided, however, that show that such a contingency plan is feasible from an operational and financial stand point. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

15. Transportation

Somerset does not commit to providing school bus transportation for all eligible students. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

16. Food Service

Somerset adequately addresses food service and, therefore, *meets* this standard.

17. Budget

Somerset does not include budgetary projections that are fully consistent with the Application. For example, there are numerous staff positions referred to throughout the Application that are not included in the proposed budgets either for the first year or, in some cases, for all five years. In addition, Somerset charges its affiliated schools an assessment for shared corporate costs and accreditation expenses. School #5151 paid Somerset \$26,800 for this fee last year. College Prep Middle School's budget does not contain a corresponding line item or amount for the first five

years. It is not clear whether this fee is being waived or deferred. Therefore, Somerset *partially meets* the standard.

18. Financial Management and Oversight

Somerset does not provide a clear description of how the school's finances will be handled and does not provide assurances that the governing board retains ultimate control over the school's finances. Therefore, there is clear and convincing evidence that the Application *does not meet* this standard.

19. Action Plan

Somerset adequately addresses the action plan and, therefore, *meets* this standard.

C. Evaluation Instrument Summary

Staff review of the Application found that Somerset *met the standard* for Sections 7, 16 and 19; *partially met the standard* for Sections 12, 13, and 17; and *did not meet the standard* for Sections I, 1, 2, 3, 4, 5, 6, 8, 9, 10, 11, 14, 15, and 18.

(End of Page)

IV. CONCLUSION AND RECOMMENDATION

Based on a thorough review of Somerset's Application in accordance with the Evaluation Instrument, staff finds that there is clear and convincing evidence that Somerset's Application is in material noncompliance with the following statutory requirements for charter school applications submitted pursuant to Sec. 1002.331(3)(a), Fla. Stat. (replication application):

- 1) Sections 1002.33(2)(a)1., 3., Fla. Stat
- 2) Sections 1002.33(2)(b)1.-4., Fla. Stat.
- 3) Sections 1002.33(6)(a)1.-5., Fla. Stat.
- 4) Sections 1002.33(6)(a)3.b.(I)-(V), Fla. Stat.
- 5) Sections 1002.33(7)(a)1.-4., 6.-11, 13., 15., Fla. Stat.
- 6) Section 1002.33(7)(a)2.a., Fla. Stat.
- 7) Sections 1002.33(7)(a)3.a.-c., Fla. Stat.
- 8) Sections 1002.33(9)(b), (c), (e), (f), Fla. Stat.
- 10) Sections 1002.33(10)(a), (b), (e), (f), Fla. Stat.
- 11) Section 1002.33(20)(c), Fla. Stat.
- 12) Section 1002.33(26)(c), Fla. Stat.

Staff recommends that the School Board find that there is clear and convincing evidence that the Somerset Academy, Inc.'s Application for Somerset College Prep Academy Middle School does not meet the standard for a sufficient number of the evaluation criteria as summarized above and as detailed in the Evaluation Instrument. Therefore, the School Board should find the Application to be quantitatively and qualitatively in material noncompliance with the charter school application statutory requirements and the Application should be denied.

2B

2.B.

Application Evaluation Instrument

Florida Charter School Application Evaluation Instrument

High Performing Replications

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

The following definitions should guide the ratings:

Meets the Standard:

The response reflects a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

Partially Meets the Standard:

The response addresses most of the criteria, but the responses lack meaningful detail and require important additional information.

Does Not Meet the Standard:

The response lacks meaningful detail; demonstrates lack of preparation; or otherwise raises substantial concerns about the applicant's understanding of the issue in concept and/or ability to meet the requirement in practice.

OVERALL ASSESSMENT – COMPLETE THIS SECTION LAST

Would you recommend approval of this Application for a public charter school? Explain your recommendation in the Summary Comments section below.

Overall, the Application does not support a finding by the School Board that the proposed charter school embraces or encourages the use of innovative learning methods or that the Application meets the standard for a sufficient number of the evaluation criteria set forth in Section 1002.33, Florida Statutes.

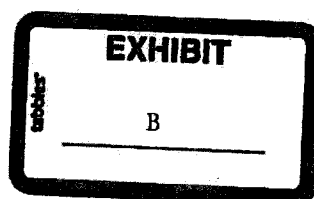
DENY	APPROVE
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Name of Person Completing Assessment: Dr. Kathy McGinn Date: September 14, 2015

Title: Executive Director of Strategic Planning

Signature: /s/ Kathy McGinn

Form Number: IEPC-HP2
Rule Number: 6A-6.0786
May 2012



I. Replication

The Replication section should include a list of every high-performing charter school that is operated by the governing board submitting the Application and should include the grade levels currently served at each school. This section should also include a general description of how the proposed school is substantially similar to at least one of the applicant's high-performing schools.

Statutory References:

s. 1002.33(6)(b)3.b.; s. 1002.331

Evaluation Criteria:

A response that meets the standard will present:

- Application includes verification letter from Commissioner of Education that applicant is a high-performing charter school.
- An education program that is substantially similar to at least one of the applicant's high-performing charter schools.
- Significant involvement in the operation of the proposed school by the organization or individuals involved in the operation of the replicated school.

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

Strengths	Reference
Concerns and Additional Questions	Reference
<p>The verification letter from the Commissioner of Education included with the Application is from 2011. Whether a charter school remains a high performing school is determined by the Commissioner of Education annually. A current verification letter was not provided in the Application as required.</p>	<p>Sec. 1002.331(5), Fla. Stat.; Sec. 1002.331(3)(a), Fla. Stat.</p>
<p>The Application states that "the one central common thread is that each and every Somerset school is unique and different. Each school serves a different population and demographic, and has students with different needs. The Somerset schools meet each student's needs in the way that is best for that student. Therefore, there is no specific design replication to any of our schools." This statement does not indicate a clear plan for replication that is substantially similar to Somerset Academy Middle School #06-5151 ("School #5151") which has been identified as the charter school to be replicated. <i>The applicant was informed of this general deficiency in the June 30,</i></p>	<p>Page 4; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>

<p>2015 letter from the School District summarizing its review of the draft Application submitted by the Applicant on May 1, 2015.</p>	
<p>While the Application states that the proposed Somerset College Prep Academy Middle School ("College Prep Middle School") will use the same educational program as School #5151, substantial similarities were not evident in several areas of College Prep Middle School's Education Plan:</p> <ul style="list-style-type: none"> • Mission, Guiding Principles and Purpose (Section 1) • Target Population and Student Body (Section 2) • Educational Plan (Section 3) • Curriculum Plan (Section 4) • Student Performance, Assessment and Evaluation (Section 5) 	<p>Education Plan, Pages 5-142; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>
<p>The Application states that the "School leader will have access to the school leader of Somerset Academy Chapel Trail Middle School, #5151" but does not provide any detail as to whether this support will be ongoing or on an "as needed" basis. <i>During the governing board interview, Mr. Bernie Montero, Somerset Academy Inc.'s President and the Principal of School #5151 stated that the governing board will deploy certain members of his staff and experts that have been working at his school for years to make sure that there is collaboration between College Prep Middle School and his school. There is nothing in the Application to support a finding that the "individuals involved in the establishment and operation of [College Prep Middle School will be] significantly involved in the operation of" School #5151.</i></p>	<p>Page 3; Sec. 1002.33(6)(b) 3.b., Fla. Stat.</p>

II. 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.

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

Strengths	Reference
Concerns and Additional Questions	Reference
The Application provides a multifaceted vision, however, it fails to present priorities that are meaningful, manageable, and measurable and focused on improving student outcomes.	Page 5; Sec. 1002.33(2)(a), Fla. Stat.
The Application states a mission for College Prep Middle School, but this mission statement does not appear to be the same as School #5151's mission statement. Furthermore, the mission statement does not provide any information regarding how College Prep Middle School will meet the statutorily dictated Guiding Principles.	Page 5; Sec. 1002.33(2), Fla. Stat.
College Prep Middle School's purpose is not defined beyond offering choice in a generic sense and does not provide any information as to how it will enhance parents' flexibility to choose among the diverse educational opportunities already provided to middle grade students within the School District. These choices include traditional middle schools, several K-8 schools, three charter schools, and a district wide magnet school.	Sec. 1002.33(2)(b), Fla. Stat.
The Application states that College Prep Middle 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 but provides no further description or detail as to the diverse educational opportunities that it will offer.	Sec. 1002.33(2)(b), Fla. Stat.
The Application does not identify any particular need for College Prep Middle School other than to serve as a "feeder for the only college preparatory charter high school option in the entire district." This relationship between College Prep Middle School and Somerset College Prep High School has not been approved by the School District which is required.	Sec. 1002.33(10) (e)6., Fla. Stat.
The Application fails to demonstrate that College Prep Middle School will meet the required purposes for a charter school. The Application states that College Prep Middle School will "improve student learning and academic achievement, ... increase learning opportunities for all students,	Sec. 1002.33(2)(b), Fla. Stat.

... or employ ... innovative learning methods” but provides no details as to how these purposes will be met.	
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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.

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

Strengths	Reference
The Application targets an average class size ratio of 21:1 which meets statutory requirements	Appendix F

Concerns and Additional Questions	Reference
The information regarding the target population contained in the Application does not reflect an understanding of the students College Prep Middle School proposes to serve. Data included in the Application provides race/ethnicity and economically needy percentages at School #5151 as well as for School District schools within a five mile radius of College Prep Middle School’s proposed location. A review of this data reflects different student populations based on economic need and racial make-up. There is nothing in the Application to indicate how College Prep Middle School will be able to replicate School #5151 even though the target student’s demographic make-up is significantly different.	Sec. 1002.33(9)(a)-(f), Fla. Stat.
The Application states that the proposed charter school may elect to limit the enrollment process to target students residing within a reasonable distance of the school as allowed by Sec. 1002.33(10)(e)4., Fla. Stat. No detail, however, was provided as to what is reasonable for this school or how the specific requirements of this statutory provision will be followed.	Page 14; Sec. 1002.33(10)(e), Fla. Stat.

In the governing board interview it was stated that traffic studies required as part of the City of Port St. Lucie site plan approval process might dictate enrollment decisions. Such a review process would not comply with the statutory provisions for limiting enrollment.	
The Application states that College Prep Middle School will limit its enrollment to students that have achieved a minimum of a 2.0 GPA equivalent. School #5151 has no similar requirement.	Page 13; Sec. 1002.33(6)(b)3. b.(II), Fla. Stat.
The enrollment number for each of the School District's middle schools listed on Application page 15 is inaccurate.	
The cover sheet identifies a maximum enrollment of 250 students in year 1 and 375 for years 2 – 5. The five year budget identifies a maximum enrollment in years 2 – 5 as 300 students. There is no further explanation regarding this difference in enrollment.	Cover page; Appendix F
A copy of a sample parent contract was included in the Appendix. The sample does not match the parent contract for School #5151.	Appendix E

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>The educational program design is not clear and coherent and, therefore, a determination cannot be made regarding substantial similarity to the educational program design at School #5151. General statements are made throughout the Application assuring that College Prep Middle School will mirror practices currently used at School #5151, however, insufficient information is provided as to what practices are used at School #5151. Furthermore, references are also made to College Prep Middle School's compliance with educational practices, teaching methods and resources currently in place in School District schools. Such a comment is inconsistent with the concept of replication. In addition, the Application does not specify when School #5151 practices will be implemented and when School District practices will be used.</p>	<p>Pages 21 – 35; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>
<p>The Application states that students in grades 6-8 will receive instruction in the areas of Language Arts, Mathematics, Science, Social Studies, and Physical Education. In addition, students will have coursework in Foreign Language and Art on a weekly basis. This is no different than the coursework offered at all School District middle grades.</p>	<p>Page 21; Sec. 1002.33(2)(b)2. and 3., Fla. Stat.</p>
<p>The Application outlines three options for school schedules but does not specify which schedule will be used. Option 3 provides the same instructional minutes in the same block structure as School #5151. There is no commitment in the Application, however, to this schedule. Rather, the Application states that "Option 1:- 4X4 COPERNICAN BLOCK is the most probable option, as it aligns with the current HS Schedule." Such a comment is inconsistent with the concept of replication.</p>	<p>Page 21; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>
<p>The Application states that College Prep Middle School will use an innovative approach through delivery of their programs and their approach to instruction that have proven to be successful throughout Somerset Academy, Inc. No detail is provided, however, as to what specific innovations will be used and how they are substantially similar to the innovations in place at School #5151.</p>	<p>Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>
<p>The Application states that the school will place significant focus on technology and train teachers to use technology in unique methods to augment learning. There is no information presented as to how School #5151 uses technology in its classrooms or how College Prep Middle School's use of technology will be substantially similar to School #5151's.</p>	<p>Page 23: Sec. 1002.33(6)(b)3 .b.(III), Fla. Stat.</p>
<p>The Application references "unique and innovative strategies aimed at student achievement" but provides no specific detail regarding what these strategies are and how they are to be implemented at College Prep Middle</p>	<p>Page 25; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>

<p>School. Furthermore, this section includes the statement that College Prep Middle School will comply with the requirement that all school districts and schools establish digital classrooms and use the adopted digital materials in accordance with the School District's adoption for 2015. There is no information provided as to how the School District's digital plan aligns with School #5151's plan for digital classrooms.</p>	
<p>The Application states that "the applicant's capacity to replicate the existing school design is evident by the success of the already existing success of its already existing 40+ replications." Such a broad statement does not suggest that there are credible and well-defined strategies specifically focused on replicating School #5151 at College Prep Middle School. In fact, such a statement argues against replication.</p>	<p>Page 30; Sec. 1002.33(6)(b), Fla. Stat.</p>

4. Curriculum Plan

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

Statutory Reference(s):

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

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

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

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>Section 4 of the Application does not provide adequate information as to the curriculum plan currently in place at School #5151. Therefore, it is impossible to determine whether the curriculum plan proposed for College Prep Middle School is a replication of the School #5151 curriculum plan.</p>	<p>Pages 36 – 86; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>

<p>The curriculum plan presented in section 4 is unclear and conflicting.</p> <ul style="list-style-type: none"> • It states on page 36 that that the school's curriculum will be developed with the Florida standards at its core, suggesting that the curriculum plan for the school has yet to be completed. Furthermore, throughout this section several different curriculum programs are identified that "may" be used in each of the core and elective subject areas the school proposes to offer. • The Application also references, in general, Somerset Academy's use of state-adopted and research-based curriculum but does not describe in any detail how such curriculum is implemented at School #5151 or how such curriculum will be used at College Prep Middle School. <p>The Application does not clearly identify the separate reading curriculum that it will use for students reading below grade level. National Geographic Hampton Brown Edge is proposed for both intensive reading and the comprehensive core reading program in grades 6 – 8. Additional comprehensive intervention materials/program that "may" be used are also listed and include Study Island, SRI, Reading Counts, Reading Plus, Voyager Passport Reading Journeys 6 – 8, Glencoe Reader, Jamestown, Read XL, Wilson Reading System, and Achieve 3000. Furthermore, no information is provided with regard to the reading program in place at School #5151. Therefore substantial similarities between reading curriculum at School #5151 and College Prep Middle School cannot be determined.</p>	<p>Pages 36, 41, 43, 69, 72, and 73; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.; Sec. 1002.33(6)(a)4., Fla. Stat.; Sec. 1002.33(7)(a)2.a., Fla. Stat.</p>
<p>The list of mathematics, science and social studies courses that may be offered in some combination at College Prep Middle School includes courses that are traditionally offered at the high school level. No further information is provided as to how these courses will be offered and what prerequisites will be required at the middle school level before enrollment in these courses.</p>	<p>Pages 52, 55, and 59; Sec. 1002.33(6)(a)2., Fla. Stat.; Sec. 1002.33(7)(a)2., Fla. Stat.</p>
<p>The Application states that HMH Collections and Journeys curriculum along with Springboard as supplemental, may be used in its Languages Arts classes. Journeys is a curriculum designed for students in grades K - 5. There is no further detail as to how an elementary curriculum would be used appropriately with middle grade students. Further, Springboard curriculum is not on the state's most recent adoption list for E/I.A.</p>	<p>Pages 45 and 49; Sec. 1002.33(6)(a)2., Fla. Stat.</p>
<p>The Application states that Math 1, Math 2, Pre-Algebra, and GEM 6 will be offered while a chart shows that Math I, Math II, Math III, Algebra I and Geometry will be offered. It is not clear whether all of these courses will be offered or how a decision will be made to offer some but not all of</p>	<p>Pages 52 and 54; Sec. 1002.33(6)(a)2., Fla. Stat.</p>

<p>these courses. Furthermore, there is no information about the GEM 6 course in the Application.</p>	
<p>The science courses listed include Earth Space Science for 7th grade and Physical Science for 8th grade students. These courses are not taught at School #5151 according to their course selection forms for middle grade students.</p>	<p>Pages 57-58; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>
<p>The Application states that College Prep Middle School may also use the state-approved Scott Foresman text in the instruction of social studies, but does not provide any information or detail as to how this text will be used in conjunction with the textbooks identified elsewhere in the Application. Furthermore, it is not evident from a review of the syllabi posted on the School #5151 social studies teachers' websites that these texts are used in their middle school social studies courses.</p>	<p>Pages 60 and 61; Sec. 1002.33(6)(a)2., Fla. Stat.; Sec. 1002.33(7)(a)2., Fla. Stat.; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.</p>
<p>The Application states that College Prep Middle School will ensure that network infrastructure will include both wired and wireless infrastructure to support classrooms. It is not clear as to when this infrastructure will be in place given that the school facilities plan includes the potential use of portables for the first year.</p>	<p>Page 68; Sec. 1002.33(7)(a)2.b., Fla. Stat.</p>
<p>The Application states that the school will use the Hampton Brown National Geographic Edge Series for its intervention reading program for all grades at College Prep Middle School. This curriculum does not appear to be used at School #5151.</p>	<p>Page 69; Sec. 1002.33(6)(b)3. b.(II), Fla. Stat.; Sec. 1002.33(6)(a)4., Fla. Stat.; Sec. 1002.33(7)(a)2.a., Fla. Stat.</p>
<p>The Application states that students scoring level 1 or 2 on the most recent state standardized reading assessment will be required to complete an intensive reading course. Three courses are specified based on assessment results, however, no curriculum is identified for these courses to ensure the instructional needs of students reading below grade level will be met.</p>	<p>Pages 73 and 92; Sec. 1002.33(6)(a)4., Fla. Stat.; Sec. 1002.33(7)(a)2.a., Fla. Stat.</p>
<p>The Application states that the Reading Leadership team will oversee the implementation of the Comprehensive Reading Resource Program (CRRP) at the school. The membership of this team is made up of the principal, assistant principal, reading coach, media specialist, ESE teacher, ELL Coordinator, Testing Chair, Department Chairs and Reading Teachers. It is not clear how this team will be staffed at College Prep Middle School given that the assistant principal, reading coach, media specialist, full time ESE teacher, and ELL coordinator are not funded in College Prep Middle School's proposed budget. There is no information in the Application as to how this difference in team members will still</p>	<p>Page 76; Sec. 1002.33(6)(a)4., Fla. Stat.; Sec. 1002.33(7)(a)2.a., Fla. Stat.</p>

allow for the implementation of a reading program that is substantially similar to School #5151's.	
The Application states that the FAIR, SRI or any assessment mandated by the School District as a screener will be implemented. The School District does not use the FAIR or SRI assessment, however, School #5151 does. It is not clear which assessments College Prep Middle School will use for screening.	Page 77
The Application states that each classroom will maintain a classroom library but is not clear as to how these libraries will be created as there are no funds budgeted for media services in all five years of the proposed budget.	Page 78; Sec. 1002.33(6)(a)4., Fla. Stat.; Sec. 1002.33(7)(a)2.a., Fla. Stat.
The Application states that the Florida Kindergarten Readiness Screener will be given to kindergarteners however the age group is not served at College Prep Middle School.	Page 79
The Application states that the school will use the progress monitoring tools as identified in the School District's CRRP. The School District's progress monitoring tools are not substantially similar to School #5151's.	Page 79; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.
The Application states that the reading coach will design workshops to address the needs of classroom instruction. There is no reading coach position in the proposed budget.	Page 80; Sec. 1002.33(6)(a)4., Fla. Stat.; Sec. 1002.33(7)(a)2.a., Fla. Stat.
The elective courses offered at School #5151 are different than those identified in the Application as possible elective courses proposed for College Prep Middle School.	Pages 82 and 85; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
The educational goals and objectives that are set out in the Application do not reflect the same high standards for student performance achieved by School #5151 students. As a replication of School #5151, College Prep Middle School should have an expectation that these same high proficiency scores will result for students enrolled at the school. Further, College Prep Middle School's educational mission is to promote a culture that maximizes scholar achievement. Setting "student performance standards for English/language arts, mathematics, science, and civics that will meet or exceed the district and/or state average whichever is higher" does not support College Prep Middle School's vision of being a college preparatory school, nor does it reflect the high expectations of School #5151.	Pages 5, 87 and 88; Sec. 1002.33(6)(a)3., Fla. Stat.; Sec. 1002.33(7)(a)3., Fla. Stat.
The Applicant doesn't demonstrate an understanding of the difference between Annual Measureable Objectives (AMO) and measures of proficiency and learning gains on state assessments. Further, AMOs are set for the tested group of students as a whole, however, there are no goals set for each of the six subgroups that are also included in AMO measures.	Sec. 1002.33(6)(a)3., Fla. Stat.; Sec. 1002.33(7)(a)3., Fla. Stat.
The Application states that the proposed charter school has set Annual Measureable Objectives for Testing Year 1 (2016-2017) for Algebra II. Algebra II is not identified as being offered at College Prep Middle School.	Pages 54 and 87; Sec. 1002.33(6)(a)3., Fla. Stat.; Sec. 1002.33(7)(a)3., Fla. Stat.
The Application states that the school will implement the state's/district's testing calendar and performance measurements, with the same frequency of assessments in accordance with district and/or statewide assessments.	Page 89; Sec. 1002.33(6)(a)3., Fla. Stat.;

<p>It is not clear if College Prep Middle School is proposing to participate in state assessments only or to participate in all School District assessments. If all School District assessments are proposed for implementation at College Prep Middle School then, this assessment plan conflicts with that implemented by School #5151.</p>	<p>Sec. 1002.33(7)(a)3., Fla. Stat.; Sec. 1002.33(6)(b)3. b.(II), Fla. Stat.</p>
<p>The Application states that “[i]nstructional staff members may utilize such evaluative devices and techniques as may be needed to report individual achievement in relation to school goals, acceptance norms, and student potential.” No information, however, is provided as to what evaluative devices would be used, how they would be used, and how progress in “acceptable norms” and “student potential” will be defined and measured.</p>	<p>Page 90; Sec. 1002.33(6)(a)3., Fla. Stat.; Sec. 1002.33(7)(a)3., Fla. Stat.</p>
<p>The Application states that any student who scores at Level 1 on the state standardized reading assessment must enroll in and complete an intensive reading course. State reading assessments are no longer administered.</p>	<p>Page 90</p>
<p>The Application states that the Florida Alternative Assessment may be administered on an as needed basis. This is in conflict with Section 6 of the Application where it states that the school intends to serve students with disabilities whose needs can be met in a regular classroom and would therefore participate in the FSA program.</p>	<p>Page 99</p>
<p>The Application states that the school instructional leadership team consists of the principal, assistant principal, grade level chairs, ESE and ESOL teachers, reading coach, and media specialist. The assistant principal, ESOL teacher, reading coach and media specialist positions are not included in the proposed budget for year one.</p>	<p>Page 99; Appendix F; Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>The Application states that a School Improvement Plan may be developed with participation from SAC members. It is not clear if College Prep Middle School plans to create a formal school improvement plan or not. Furthermore, School #5151 has not submitted a state School Improvement Plan since 2012 – 2013.</p>	<p>Pages 100 and 101</p>

6. Exceptional Students

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>The Application does not clearly describe the students with disabilities population it intends to serve. Several statements made in this section conflict when describing the services that will be provided for children with disabilities.</p> <ul style="list-style-type: none"> • The Application states that it will service students with disabilities whose needs can be met in a regular classroom environment. • The Application states that students with disabilities will be included in the mainstream classroom to the greatest extent possible, however, there is no further information presented in the Application as to what, specifically, "greatest extent possible" means in terms of specific services provided to students with disabilities. <p><i>During the interview with the governing board, when asked specifically if the school will provide a continuum of services for children with disabilities and their response was yes. This answer is inconsistent with the Application.</i></p> <ul style="list-style-type: none"> • The Application discusses administration of FAA as needed. According to the FDOE website only students with the most significant cognitive disabilities who are eligible under IDEA will participate in the Florida Alternate Assessment. • The Application includes a list of 14 different disabilities and how services will be provided for each disability. This conflicts with the earlier statement that the proposed charter school will provide only an inclusion model with ESE support. 	<p>Pages 99, 102, 109-111 and 112; Sec. 1002.33(10)(f), Fla. Stat.</p>

<ul style="list-style-type: none"> The Application states that for students needing a resource room or separate class setting to support their educational needs an IEP team meeting will be held with a staffing specialist, a representative from the student's zoned school and the child's parents to discuss the appropriate educational placement. This implies that such students will not be served by College Prep Middle School but will be served by the School District. 	
<p>The Application includes physical therapy and occupational therapy within a list of disabilities and states that College Prep Middle School will provide these services for students. Both are related services. All other disabilities listed include the statement that "an ESE teacher may provide services" rather than shall provide services suggesting that services won't be provided for the listed type of disability.</p>	<p>Pages 109 and 111; Sec. 1002.33(10)(f), Fla. Stat.</p>
<p>There are several references to an ESE Coordinator and ESE teacher in this section of the Application. One section describes co-teaching which requires both a general education and ESE teacher in the classroom at the same time. The Application states that records will be carefully examined by the school faculty and ESE coordinator. There is no ESE instructional position identified in the school's proposed budget for all 5 years.</p>	<p>Pages 103, 105, and 111; Appendix F; Sec. 1002.33(10)(f), Fla. Stat.; Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>The Application describes the school instructional leadership team as meeting weekly and consisting of the principal, assistant principal, grade level chairs, ESE and ESOL teachers, Reading Coach and Media Specialist. While School #5151 has faculty in these positions, the proposed budget does not include an assistant principal, a full time ESE or ESOL teacher, a reading coach, or a media specialist. With a much smaller, less diverse school instructional leadership team, College Prep Middle School will not be able to replicate School #5151's instructional leadership team.</p>	<p>Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>The description of Response to Intervention services to determine eligibility for special education does not demonstrate a clear understanding of Response to Intervention or how it relates to students with disabilities.</p>	<p>Pages 111 and 115; Sec. 1002.33(10)(f), Fla. Stat.</p>
<p>The Application states that a school based team (SBT) will be identified to review pertinent data for individual students to review progress data and develop interventions as a part of MTSS. The Application further states that the SBT also serves as a filtering process but provides no clear description of what this process entails or what the outcomes of filtering will be.</p>	<p>Page 105</p>
<p>The Application states that College Prep Middle School will take steps to ensure that there is a variety of educational programs and services available to nondisabled students listing art, music, industrial arts, consumer and</p>	<p>Page 109; Sec. 1002.33(6)(a)5., Fla. Stat.;</p>

homemaking education and vocational education as options to be offered. These courses are not included in Section 4 as part of the curriculum plan. Furthermore, School #5151 does not offer courses in industrial arts, consumer and homemaking education or vocational education. The proposed budget does not include positions to teach these courses.	Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.
The Application states that College Prep Middle School agrees to implement the School District's policies and procedures with respect to Special Education according to reasonable expectations but provides no further detail as to how "reasonable" is to be defined; what services and supports this expectation includes; or how College Prep Middle School will provide a continuum of services for students with disabilities.	Page 112; Sec. 1002.33(10)(f), Fla. Stat.

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference

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)

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
The Application describes College Prep Middle School's rights to dismiss students. The charter includes the admissions procedures and dismissal procedures to be used by the school as agreed to by the School District. A charter school does not have the authority to implement dismissal procedures not agreed to in the charter.	Pages 140 and 141; Sec. 1002.33(7)(a)7., Fla. Stat.; Sec. 1002.33(7)(a)11., Fla. Stat.
The Application states that the school will have a team/discipline committee which includes a school guidance counselor, however, this position is not included in the proposed budget.	Page 136; Sec. 1002.33(7)(a)7., Fla. Stat.; Sec. 1002.33(7)(a)11., Fla. Stat. Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.;
The Application states that a student can be dismissed for failure to maintain a GPA of 2.0 but provides no further information as to what steps the school will take to provide additional academic support prior to dismissing the student. School #5151 has no such policy whereby students may be dismissed for failing to maintain a specified GPA.	Page 141; Sec. 1002.33(7)(a)7., Fla. Stat.; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.

A copy of a sample parent contract was included in the Appendix. The sample does not match the current parent contract being used at the School #5151.	Appendix E; Sec. 1002.33(6)(b)3. b.(III), Fla. Stat.
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III. Organizational Plan

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

9. Governance

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

Statutory Reference(s):

s. 1002.33(7)(a)(15); s. 1002.33(16)(b)(5)

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.
- 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.

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

Strengths	Reference

Of the nine members of the proposed Board of Directors, four live outside of Florida, including the Board Chairman – David Conception, who currently resides in California. All of the five remaining board members reside outside of St. Lucie County.	Pages 148 and 152; Sec. 1002.33(7)(a)15., Fla. Stat.
The Application describes "Board Member Tony Morales, alumnus of Somerset Academy and currently serving as a board member, as the director of compliance and governmental affairs for Academica Virtual	Appendix B; Sec. 1002.33(26)(c), Fla. Stat.;

Education, LLC.” This violates Florida law and is in conflict with Section 4.5 of the Somerset Academy, Inc. Bylaws.	Sec. 1002.33(7)(a)15., Fla. Stat.
In section 4.6 of the Somerset Bylaws it states that board members must attend at least 50 percent of all board meetings held during a year. Two of the board members failed to attend any publicly noticed meeting in 2013-2014 and only attended one meeting of the Board in 2014-2015 according to approved board meeting minutes.	Page 256; Sec. 1002.33(7)(a)15., Fla. Stat.
The Application states that Somerset Academy, Inc currently operates over 40 schools in Broward, Dade, Duval, Monroe, Palm Beach and St. Lucie County in Florida. The governing board also oversees schools in Washington DC, Texas and Nevada. The Application did not address how a volunteer board of effectively five members can successfully manage 40 schools in Florida, given the diversity and locations of these charter schools throughout the state.	Pages 3 and 4; Sec. 1002.33(7)(a)15., Fla. Stat.
The Application states that College Prep Middle School’s governing board will hold at least two public meetings per year in St. Lucie County in accordance with statutory requirements. The proposed board, however, represents charter schools in six Florida school districts (Broward, Duval, Miami-Dade, Monroe, Palm Beach, and St. Lucie). Therefore, to meet the statutory requirement, the board would need to meet twelve times per school year in order to meet twice in each county. According to the board minutes posted on numerous Somerset Academy school websites, including Somerset College Preparatory Academy, the board held eight regular board meetings during the 2014-2015 school year. While the minutes do not indicate where the meetings were held, a separately posted schedule of board meetings indicates that the board did not hold any regular board meetings in St. Lucie County.	Page 148; Sec. 1002.33(7)(d)2., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.
The Application specifies the steps to be used for resolving disputes between a parent and College Prep Middle School. It states that parents should “contact educational support provider” prior to contacting the Board appointed Parent Liaison or being allowed to state concerns at a scheduled Governing Board meeting. There is no further direction or detail provided as rationale for a parent being required to contact the ESP prior to the Board Appointed Liaison. <i>During the Governing Board interview it was stated that the Application was referring to an educational support provider, which is different than the ESP. However this role of educational support provider is not referenced or described in any other section of the Application.</i>	Pages 152 and 153; Sec. 1002.33(7)(a)15., Fla. Stat.
The process for resolving disputes outlined in the Application culminates with the parent stating his/her concerns at a scheduled governing board meeting. This protocol raises concerns regarding meaningful accessibility by parents and the timeliness of the complaint being heard. As previously	Pages 152 and 153;

<p>noted, in order to meet the statutory requirements the board will need to meet twelve times during the school year of which only two of those meetings will be guaranteed as being held in St. Lucie County. Such a schedule does not lend itself to timely accessibility to the governing board for parents with concerns.</p>	
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10. Management

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

Statutory Reference(s):
 s. 1002.33(7)(a)(9); s. 1002.33(7)(a)(14)

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

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

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>The Application states that the Governing Board will fulfill its responsibilities and obligations by exercising continuing oversight over charter school operations. The school's onsite administration will ensure that the operation of the school is in accordance with the mission and vision of the school as adopted and approved by the Governing Board. The Application also states that the school principal, hired by the board, will be responsible for all aspects of school operations within the scope of operating policies and procedures and budgetary functions as adopted and approved by the governing board. However no information is provided as to the actions the Governing Board will take to meet this requirement or how it will hold the school responsible for fulfilling its duties as described above. While Somerset Academy, Inc. governs over 40 schools in Florida the Application did not include standard operating manuals for its schools, a set of standard operating procedures or describe any other means of establishing Somerset Academy's operational expectations.</p>	<p>Page 154; Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)14., Fla. Stat.</p>
<p>The Application states that the school's faculty and staff will report directly to the principal, who shall report directly to the governing board and that the principal will report to the board on the school's operations and finances at a minimum at every governing board meeting. However, a review of governing board meeting minutes from 2014-2015 does not reflect regular attendance by principals or regularly submitted reports made by principals regarding their school operations or finances.</p>	<p>Page 154; Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)14., Fla. Stat.</p>
<p>The Application states that the governing board expects it will contract with Academica to be the Educational Service Provider ("ESP") who will provide central office functions including but not limited to: assistance with facilities design and maintenance, staffing recommendations and human resource coordination, curriculum support, research and updating, sponsor relations and reporting, program marketing, general accounting services including bookkeeping, payables, asset management, budget preparation, risk management, cash flow analysis, and preparation of financial statements provided to the Governing Board for oversight and approval. While it appears that the ESP is a critical component of the school's management structure, the Application does not specify: 1) what services are provided at the individual school level, 2) how specific duties and responsibilities are allocated between the ESP and school staff, 3) what employee position at the ESP will perform these services, 4) the duties and responsibilities as related to onsite management, and 5) how, and with what frequency, the ESP employees will be interacting with school staff.</p>	<p>Page 154; Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)14., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.</p>

<p>There is no description, or acknowledgement, of the frequent communication between the Governing Board and the school principal that is required in the oversight of daily operations of a charter school. Further, Somerset Academy, Inc. does not appear to employ any organizational staff or regional support personnel to assist in the operation of its 40 plus schools but instead, chooses to contract with the ESP to assume this responsibility for daily oversight. <i>It was stated at the interview that the Governing Board expects reports at each meeting regarding its new schools, however, there was no further information as to who, specifically, is responsible for the ongoing oversight of the Board's charter schools.</i></p>	<p>Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)14., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.</p>
<p>The Application describes the requirements for evaluation of school based administrators in compliance with Sec. 1012.34, Fla. Stat. and states that the Governing Board will conduct formal administrator evaluations annually. In addition, upon a request from the District, a copy of an evaluation form was provided by the governing board. Neither the Application nor the employee evaluation form provide any detail regarding how these legal requirements will be met. It is unclear how the governing board will be able to logistically conduct the evaluations for all of the school based administrators that they supervise.</p>	<p>Pages 155 and 156; Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)14., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.</p>
<p>The Application describes the hiring process for administrative positions wherein the "Board conducts final interviews of the most qualified candidates and hires the Principal and any assistant principals as the need arises". A review of the governing board minutes for 2014-2015 reflects that recommendations for appointment for 5 principals were approved by the Board, however, there is no record of the board conducting final interviews with principals nor is there any action taken with regard to other school administrators (e.g. assistant principals).</p>	<p>Page 158; Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)14., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.</p>
<p>The Application states that the proposed charter school will reimburse full-time certified teachers for tuition using the criteria listed. While professional development workshops and trainings are budgeted at \$1,000 per classroom teacher, there is no proposed budget for each of the five years that includes any cost for this reimbursement plan.</p>	<p>Pages 163 and 164; Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>The Application is inconsistent with regard to hiring the school leader. In one section it states that the school principal will be hired by the Board who intends to recruit talented individuals who have the knowledge of and experience with instructional, educational, and school-site matters. In contrast, in a written response provided by the Governing Board on September 1, 2015, it was stated that "the school leader of 0712 [Somerset College Prep High School] will be the same leader of the middle school." The Application also states that administrative salaries will include a ½ principal for the first year of operation and the Somerset College Prep High School will loan the assistant principal to College Prep</p>	<p>Pages 155 and 157; Appendix F and written responses from the Governing Board received on September 1, 2015; Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.;</p>

<p>Middle School at no cost to the school. The proposed budget in Appendix F includes a full-time principal beginning with year two. It is not clear from the Application if the intention is to 1) hire a new principal once the school is approved, 2) share the principal with the Somerset College Prep High School in year one and then hire a full time principal, or 3) hire a full time principal in year 2 separate from the existing high school. If the principal is to be shared with the high school, no procedures have been identified that ensure that this administrative staffing plan will not negatively impact either charter school.</p>	<p>Sec. 1002.33(7)(a)14., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.</p>
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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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>The Application fails to provide a persuasive explanation for why Academica was chosen as the ESP. The Application states that the governing board analyzed data regarding several ESPs currently working with charter schools in Florida and concluded that this ESP (Academica) offered the most competitive price. No further information is provided as to the specific criteria that was analyzed in making this decision. <i>In the August 24, 2015 documents request, information or documents that discuss or analyze any ESP other than Academica that was considered by the Governing Board were requested, however, no documents were provided by Somerset Academy, Inc.</i> From a review of public records it is clear that Somerset Academy, Inc. and Academica have a very close working relationship that militates against a market driven arm's length relationship between the two. It is also clear that from a practical operational standpoint the lines of authority have blurred to the point where for all intents and purposes Somerset Academy, Inc. and Academica are essentially one and the same. It appears that Somerset Academy, Inc. has delegated almost all if not all operational control to Academica. One example of this close relationship is evidenced by Academica's Chief Financial Officer signing Somerset Academy, Inc.'s IRS Form 990. By signing Somerset Academy, Inc.'s Form 990, Academica's CFO is swearing that she is the "officer of the organization who, regardless of title has ultimate responsibility for implementing the decisions of the organization's governing body, or for supervising the management, administration or operation of the organization."</p>	<p>Page 165; Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>The Application does not clearly and completely describe the services and deliverables that will be provided by the ESP to College Prep Middle School in exchange for its \$450 fee per student. It outlines a list of areas that it will assist the school with but no further detail is provided as to what, specifically, will be provided to the school and governing board as a result of its services. Further, the sample contract provided in Appendix C of the Application provides no specific measures that will be used to assess the ESP's performance.</p>	<p>Page 165; Appendix C; Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>The Application does not adequately explain the ESP's roles and responsibilities for financial management of the proposed charter school as required in section 11 (D) of the Application nor does it clearly specify the internal controls that will be used to guide the governing board/ESP relationship.</p>	<p>Pages 166 and 167; Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>The Application states that the Governing Board will conduct periodic and annual evaluations of the performance of the proposed charter school through data provided by the ESP. It does not indicate any other data sources for measuring performance of the school, nor does it specify the criteria that will be applied in the evaluation of ESP performance as it relates to the performance of the school.</p>	<p>Pages 165 and 167; Sec. 1002.33(7)(a)9., Fla. Stat.</p>

<ul style="list-style-type: none"> • The proposed contract does not clearly demonstrate an “arm’s length” relationship between the governing board and the ESP. Specifically: <ul style="list-style-type: none"> ○ All data for analysis by the Governing Board regarding school operations is provided by the ESP. ○ The ESP is designated as the primary liaison between the district as sponsor and the governing board. ○ Somerset Academy, Inc.’s corporate address is the same as Academica’s. 	<p>Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>In the proposed contract between the applicant and the ESP specific performance measures to assess the ESP’s performance are not identified. A description of the internal controls that will be used to guide the governing board/ESP relationship is also not specified.</p>	<p>Appendix C; Sec. 1002.33(7)(a)9., Fla. Stat.</p>
<p>The Application states that the governing board will conduct a performance evaluation of the ESP on an annual basis to measure the service levels provided by the organization. The evaluation is grouped by area or specialty of service provided by the ESP and using a rating scale ranging from 1 (unsatisfactory) to 5 (highly effective). The Boards reviews this evaluation as a means of determining service improvement, satisfaction with services and ESP contract renewal. A review of the minutes from each regularly scheduled governing board meeting during the 2014-2015 does not reflect any review or action taken as it relates to this annual review. Given that the only communication between governing board members must, by law, take place during a governing board meeting it does not appear that an annual evaluation has occurred.</p>	<p>Pages 165 and 167; Sec. 1002.33(7)(a)9., Fla. Stat.</p>

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
The Application states that Individual Professional Development Plans (IPDP) are expected of each faculty member. It is not clear if this IPDP is in addition to the Deliberate Practice Plan (DPP) referenced elsewhere in the Application.	Pages 161 and 173; Sec. 1002.33(7)(a)14., Fla. Stat.
The professional development plan described in Section 12 of the Application does not provide any detail as to how teachers will receive specific training to ensure implementation with fidelity of the teaching strategies and instructional content as outlined in sections 3 and 4 of the Application.	Page 173; Sec. 1002.33(7)(a)14., Fla. Stat.

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference

IV. 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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>The Application states that the proposed facility will be located on 10.4 acres and will include 100,000 square feet and 1500 student stations at full build out. This facility will be leased by College Prep Middle School at a budgeted cost projection of \$900 per student station. The Application state that "this amount is comparable to that paid by several other charter schools with similar enrollment numbers which have opened recently." Additionally, the governing board has obtained confirmation that this budgeted amount comports with the current forecast of lease conditions. No further detail was provided, however, as to the specific charter schools that were used as comparables or the specific information and data that was used to confirm that this amount comports with current forecast of lease conditions as specifically related to St. Lucie West, the proposed location for the new charter school facility.</p>	

The Application states that "In the event that issuance of the Certificate of Occupancy is for any reason not expected in a timely fashion, Somerset College Preparatory Academy Charter High School (currently located in SLW) has a 5 year lease, renewable at the end of each year, with permission to add portables on site and will allow Somerset College Preparatory Middle School to share space." No further information is provided as to a timeline for decision to implement the school's back up plan, what costs will be allocated to College Prep Middle School should it need to be located at the current campus, what number of portables are anticipated and what infrastructure costs are estimated for each portable needed. *In a written follow up response provided by the Governing Board on September 1, 2015, it states that "a backup facilities plan will not be needed as the proposed site has already been secured and approved."* This response is not acceptable as it does not reflect prudent planning for facilities at the school.

Page 180;
Sec. 1002.33(7)(a)13.,
Fla. Stat.;
Sec. 1002.33(18), Fla.
Stat.

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)(c)

Evaluation Criteria:

A response that meets the standard will present:

- A transportation plan that will serve all eligible students.

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

Strengths	Reference

Concerns and Additional Questions	Reference
The Application is ambiguous as to what level of transportation will be provided for students by the school. In general, the Application states that transportation will not be a barrier to equal access. However, the Application also states that:	Page 181; Sec. 1002.33(20)(c), Fla. Stat.

<ul style="list-style-type: none"> • parents will be expected to provide the majority of students with transportation and that parent/guardians will be required to provide transportation for their children in exchange for volunteer hours. • the school will provide a transportation survey with the registration packet to determine the number of children requiring transportation but does not define the criteria that will be considered by the school in making this determination. • If parents believe transportation for their child is needed and if the parent advises the proposed charter school that there is a hardship, and he/she is unable to provide the transportation, the school may provide transportation within a defined reasonable distance. • When transportation is needed the school may provide transportation by contracting with an independent private transportation provider. <p>The Application fails to provide any further information or clarification that resolves these ambiguities thereby insuring that transportation will not be a barrier to enrollment in the school. Furthermore, it is the School District's long held position that school bus transportation must be provided for all eligible students.</p>	
<p>The Application states that a reasonable distance is two to four miles from the school. Reasonable distance is determined by the governing board and the School District and is determined by a number of factors including whether the school is open to students county wide.</p>	<p>Page 181; Sec. 1002.33(20)(c), Fla. Stat.</p>
<p>Other than a generalized statement that the school will ensure that transportation will not be a barrier to equal access there is no further detail provided as to how this assurance can be made if parents are expected to provide their own transportation.</p>	<p>Page 181; Sec. 1002.33(20)(c), Fla. Stat.</p>

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>The Application does not include budgetary projections that are consistent with all parts of the Application. Specifically:</p> <ul style="list-style-type: none"> • The budget is inconsistent with the ambitious use of technology described in the Application. Technology is mentioned frequently throughout the Application and is emphasized as a key attractor for the school. The Application refers to a "technology rich environment" that will "integrate technology across all major disciplines." The proposed budget, however, does not support this 	<p>Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.</p>

<p>assertion and there is no discussion in the Application such as students bringing their own devices as a means of reducing technology costs.</p> <ul style="list-style-type: none"> • While a line item for computer lab is included in the projected budget there are no funds allocated to this expenditure for any of the five years projected. • Several positions identified in the Application as in place during the entire term of the charter are not funded in year one of operation. These positions include Guidance Counselor, ESE Coordinator, Assistant/Vice Principal, Reading Coach, Media Specialist and Curriculum Coach. These positions are named in the Application as critical positions for the successful implementation of the proposed educational program design, curriculum plan and services for students with disabilities as described in the Application. Further, each of these positions are in place at School #5151. • In Section 10 of the application the positions of accounts payroll clerk and treasurer are listed with duties at the school. These positions are not listed in the staffing plan for the school and are not included in the proposed budget. 	
<p>Somerset Academy, Inc. charges its affiliated schools an assessment for shared corporate costs and accreditation expenses. School #5151 paid Somerset Academy, Inc. \$26,800 and Somerset College Preparatory Academy was assessed (although it did not pay it due to a budget short fall) \$21,300 in connection with these charges as reported in each school's most recent audited financial statements. This fee is not included in any of the five years projected in the proposed budget for College Prep Middle School.</p>	<p>School #5151 Financial Statements and Independent Auditors' Report, June 30, 2014, Page 24; Somerset College Prep High School Financial Statements and Independent Auditors' Report, June 30, 2014, Page 25; Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.</p>

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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>The Application does not provide a clear description of how the school's finances will be handled and does not provide assurances that the governing board retains ultimate control over the school's finances</p> <ul style="list-style-type: none"> • As evidenced in Section 11 and the sample ESP contract included in Appendix C, significant management oversight of all school operations is contracted to Academica, including significant involvement and control of school finances. 	<p>Section 11, Appendix C; Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.</p>
<p>The Application fails to describe strong internal controls sufficient to safeguard finances in the day to day operation of the school.</p> <ul style="list-style-type: none"> • The Application states that employees of Academica are authorized to sign checks over a certain amount. Although this would be implemented using a dual signatory format, it still exemplifies a severe lack of control to allow any contractor to have any access to the school's funds for any reason, especially given that the school is only intending to have one half-time office staff position, and one half-time principal in year one. • The description of general accounting procedures does not provide information regarding the specific staff position(s) that will be responsible for conducting these procedures and practices. Only one half-time office staff position is funded in year one. The Application provides no information regarding how segregation of duties and internal control over cash and other assets will be achieved given this single staff member. 	<p>Page 193; Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.</p>

<p>The Application includes references to a treasurer, accounts payable clerk and a financial manager, however, no further detail is provided as to whether these positions will be employees of the proposed charter school or if they are employees of the ESP.</p>	<p>Pages 167 and 193; Sec. 1002.33(6)(a)5., Fla. Stat.; Sec. 1002.33(7)(a)9., Fla. Stat.; Sec. 1002.33(7)(a)15., Fla. Stat.</p>
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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.

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

Strengths	Reference

Concerns and Additional Questions	Reference

3

Exhibit 3.	Somerset Governing Board Interview Transcripts: August 27, 2015
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SOMERSET GOVERNING BOARD INTERVIEW

St. Lucie County School Board

4204 Okeechobee Road

Fort Pierce, Florida 34950

August 27, 2015

10:00 a.m. - 11:18 a.m.

IN ATTENDANCE:

Kathy McGinn, Assistant Superintendent SLC

Johnathan Ferguson, Esquire

Bill Tomlinson, Exec. Director ESE SLC

Nicholas Zrallack, Curriculum Director SLC

Tim Bargeron, CFO SLC

Bernardo Montero, President Somerset

Sarah Fye, Curriculum Specialist Somerset

Todd German, Somerset Board Member

Ana Diaz, Somerset Board Member

Lourdes Isla-Marrero, Somerset Board Member

Erika Rains, Principal Somerset College Prep.

Charles A. Gibson, Esquire

ORIGINAL

P R O C E E D I N G S

1
2 MS. MCGINN: Since we've already done
3 introductions by way of the court reporter, let's just
4 go ahead and get started right away. I believe you
5 all have questions in front of you. I believe most of
6 you are familiar with the process, in terms of this is
7 a set of interview questions. We're obviously here to
8 discuss the application for the charter middle school,
9 Somerset Academy Charter Middle School.

10 We've had a chance to review the
11 application. We've had a chance to develop these
12 questions in response to that review or as a result of
13 that review. Your answers will be used in completing
14 the evaluation process. I'm certain most, if not all,
15 of you have been through this before because I
16 recognize the faces. So thank you for coming.

17 And, again, I know I've said this several
18 times, but two things: We're going to work to really
19 respect your time because we do realize it's very
20 valuable. At the same time, we're in the process of
21 tropical storm/hurricane preparations. So you may see
22 folks moving in and out. I just want you to know that
23 has become a priority as of this morning. So
24 hopefully we'll be able to get through without a
25 hitch.

1 MR. FERGUSON: Electronic devices.

2 MS. MCGINN: I had already said please turn
3 your electronic devices off. We had informed Miss
4 Rains about that. I believe I included --

5 MR. GERMAN: I understand, but can we
6 respectfully say no?

7 MS. MCGINN: No.

8 MR. FERGUSON: You can. We'll take it into
9 account as part of the evaluation.

10 MR. GIBSON: So we'll be evaluated if our
11 Board members' electronics are on during this
12 interview process, that will be a part of the
13 evaluation process?

14 MR. FERGUSON: It will and we have our
15 reasons for it, yes.

16 MR. GIBSON: What are they?

17 MR. FERGUSON: We would like answers from
18 the Board members without prompting from outside
19 sources.

20 MS. MCGINN: We have had that issue in the
21 past with different governing board interviews. And
22 so we, as an evaluation team, determined that it would
23 be most appropriate rather than have clearly
24 electronic communication going on between governing
25 board members and people attending, we decided that it

1 would be most appropriate so that we could get -- Let
2 me take a step back.

3 The purpose of this interview process is to
4 get a clear understanding of the Governing Board's
5 knowledge with regard to what's in the application,
6 but almost more importantly, since the Governing Board
7 is who our school board will hold responsible should
8 the charter be approved, we want to be able to share
9 an accurate description of how the interview process
10 went, the application process went. Clearly we want
11 to be able to share that the Governing Board has the
12 ability and the knowledge to make governing decisions
13 with regard to the charter school.

14 As I said, historically we have had issues
15 in terms of governing board members getting electronic
16 messages from people who are supposed to be
17 participating. So we made a decision that, at this
18 point, we will not be using electronic devices to
19 communicate with other members of our staff. We are
20 asking governing board members to turn off their
21 electronic devices, as well.

22 Now, because you, as a parent, have said you
23 would like to keep your cell phone out, in terms of
24 getting a --

25 MR. GERMAN: Well, it's not as if -- My

1 daughter is a 29-year-old medical doctor.

2 MS. MCGINN: Congratulations.

3 MR. GERMAN: I'm an investment advisor and
4 I'm technically working. I'm volunteering here and I
5 would -- I'll have my phone on ring and I won't be
6 playing Angry Birds or anything, but I'm not going to
7 turn it off. And I have no one to communicate outside
8 with.

9 MS. MCGINN: Okay.

10 MR. GIBSON: But just curious, is that
11 listed somewhere in statute where board members who
12 may not have the expertise, but have the ability and
13 the responsibility to supervise may not know all the
14 intricate questions that you may ask, because as a
15 general rule, a school board member on your board
16 would not know all the intricacies. They still are
17 held accountable. However, sometimes they would have
18 to confer to get a proper answer when you're giving
19 it. And in addition to --

20 MS. MCGINN: I have two things to say to
21 that.

22 MR. GIBSON: If you're limiting our -- if
23 you're limiting your questions to what you gave us,
24 that's somewhat understandable. However, if questions
25 are outside of the questions that you gave us to

1 prepare, that may be kind of unfair to our Board
2 members.

3 MS. MCGINN: Let me say this and I have two
4 things to say: The first thing is we have worked
5 really hard to develop these questions from the
6 perspective of a governing board.

7 MR. GIBSON: Okay.

8 MS. MCGINN: We don't expect -- As you said,
9 we do not expect our school board members or the
10 Governing Board to know the answers to all of the
11 intricate questions. At the same time, because there
12 is not that level of administrative assistance that
13 you normally have at a public school district, a
14 governing board is expected to know a little bit more
15 about the operations of a school that they govern.
16 That's the first thing.

17 MR. GERMAN: I disagree with you.

18 MS. MCGINN: The second thing is -- before
19 you continue, the second thing, we now have 45 minutes
20 left. Certainly we can continue to honor this
21 conversation and we will, if you would like to. But,
22 at the same time, that takes away from the time that
23 we want to commit to asking about the school that
24 you're proposing to open.

25 MR. GERMAN: I'll get right to it. I'll be

1 direct.

2 MS. MCGINN: Please.

3 MR. GERMAN: If there's a question you ask
4 and one of us doesn't have a very good answer or are
5 not clear on it and we want to ask Miss Rains, can we
6 defer to her?

7 MS. MCGINN: In a governing board situation,
8 if there is an operational question that needs to be
9 asked, all you -- or answered, all you need to say is
10 that's more of an operational question and I, as a
11 governing board member, believe it is more appropriate
12 to be asked of the principal of the school.

13 The purpose of this meeting, as we have
14 clarified or we have worked to communicate with all of
15 our governing board members, is that the idea is the
16 governing board is responsible for the overall
17 operation of the school that's being proposed. So
18 we're looking to get your knowledge and expertise as a
19 governing board, not whether or not you know the
20 intricacies of the payroll system, as an example.
21 That's not our purpose.

22 MR. GERMAN: I guess we should let's go and
23 we'll see what we come up against.

24 MS. MCGINN: Okay. At the same time, we do
25 want Mr. Montero to feel free to respond to questions

1 that are specific to his school, since it is being
2 proposed for replication. We have a resource here
3 that we want to use, if you're agreeable, because
4 clearly the school is a very high performing school.
5 You've got a history of A grades. You should be very
6 proud.

7 MR. MONTERO: I am. I am. She's my
8 curriculum specialist. I would hope that she can also
9 jump -- chime in on anything that relates to her
10 specific duties.

11 MS. MCGINN: Okay, very good. As you can
12 see on your questions, the first two questions have to
13 do with replication. Because it is proposed as a
14 replication of a high performing school, one of the
15 first things we want to know is the involvement that
16 you, as Governing Board, will ask of your principal of
17 the high performing school, in terms of working with
18 the principal of the new school. So look at the
19 question. Specifically it says, "On Page 2 of the
20 Application addressing the plan for replication, it
21 states that the proposed charter middle school will be
22 using the same educational program, outreach and
23 guidelines to manage and run the school." It also
24 says that every Somerset school is unique in that it
25 intends to serve the immediate needs of the local

1 community.

2 Explain how the Somerset Governing Board or
3 you will ensure that the proposed charter middle
4 school in St. Lucie will be substantially similar to
5 the high performing charter middle school, given that
6 your expectation of a governing board is that the
7 culture school will be unique.

8 MS. DIAZ: Well, as you know, the program
9 can be replicated, but we don't replicate children.
10 So our strategies are unique to the needs of our
11 students that we serve. So that's where we have a
12 replication. But, at the same time, we do use unique
13 strategies and innovative ideas to help our students.

14 MS. ISLA-MARRERO: Our subjects and other
15 electives, articulation of the educational program and
16 so on and so forth that we use.

17 MS. DIAZ: And as far as accountability, we
18 have a president that serves us and provides us with
19 reports based on his observations of the schools and
20 different areas of need.

21 MS. MCGINN: Okay. And that president is
22 David -- Oh, you. I'm sorry.

23 MR. MONTERO: He's the chair.

24 MS. MCGINN: He's the chair. Forgive me.

25 MR. MONTERO: That will be me.

1 MS. MCGINN: I apologize. I was noticing in
2 going through your bylaws, I believe that you had
3 changed them very recently. So I'm thinking okay,
4 president. So I apologize. I will try and correct
5 myself.

6 MR. MONTERO: No problem.

7 MS. DIAZ: The organizational structure was
8 developed just to provide us with that oversight.

9 MS. MCGINN: Okay, very good.

10 Second question, the Application states that
11 the Somerset Board, Academica, your educational
12 service provider, and business partners are involved
13 with all Somerset Academy schools. It also says that
14 the school leader of the proposed charter school will
15 have access to Mr. Montero.

16 How will the Governing Board ensure that the
17 resources, these resources are used effectively so the
18 program provided to students here will substantially
19 replicate the high performing school that you lead?

20 MR. MONTERO: Well, as the liaison between
21 the principals and the Governing Board, the Governing
22 Board will deploy -- ask me to deploy certain members
23 of my staff that are very resourceful and experts and
24 have been working at my school for years to make sure
25 that we collaborate with Miss Rains' middle school,

1 the proposed school, to instill and implement the
2 programs that are needed for the school. It's a
3 collaborative process. We network very closely.
4 We've been doing it for years already. So we're very
5 excited to make sure that we continue this and expand
6 it to get the school off on the right steps and for it
7 to succeed.

8 MS. MCGINN: Moving on to the Educational
9 Plan, Section I of the Application provides a broad
10 overview of the purpose for the proposed school, but
11 it doesn't address specifically how the school will
12 offer an innovative educational program that goes
13 beyond anything that's currently offered in our school
14 district already. So what we're wondering is what
15 innovative educational programs will the charter
16 school offer here to students, middle grade students
17 in St. Lucie County?

18 MR. MONTERO: Sarah, go ahead.

19 MS. FYE: What we've produced in Broward
20 County in our middle school, what we have brought
21 about is almost a college prep middle school and we
22 encourage our students to be in courses that we call
23 them pre AP. We're encouraging our students to be
24 thinking at the high school level in middle school,
25 including taking high school courses, which would

1 allow them to be eligible for dual enrollment and
2 early college admissions. And these are the things
3 that we're instilling at the middle school level; and
4 these are the programs that we're hoping to replicate
5 to innovate that system here.

6 MR. MONTERO: One of the things that makes
7 us high performing is that we definitely work with all
8 three tiers. We push our accelerated students to take
9 high school courses to get high school credit, prepare
10 them for the AA track and for AP courses and succeed
11 in AP courses. We work with on-level students and try
12 to push them to make the honors track. And with those
13 low-performing students we really do a good job at
14 making sure they get what they need to get out of that
15 intensive remedial track. I think we've been very
16 successful at it, as you know, as you said earlier
17 today. And it's something that's replicated, but it's
18 going to be unique here because of the differences in
19 the population, right. The same work ethic will apply
20 and the same philosophy will be implemented, which is
21 to care immensely for the kids, so that they're
22 encouraged and inspired to progress.

23 MS. MCGINN: In terms of -- And this is sort
24 of a follow-up question. The application does state
25 specifically that the educational program will be rich

1 in technology.

2 What does that -- as a governing board, what
3 do you see that looking like?

4 MS. ISLA-MARRERO: I mean, technology, they
5 have to be ready for the upcoming century. A lot of
6 programs out there that really help the kids progress,
7 such as Study Island, Reading Plus and I guess --

8 MS. DIAZ: It's an expectation of the use of
9 technology that we have, as a governing board, that we
10 have for all of our schools.

11 MS. MCGINN: Okay.

12 MS. FYE: Pretty much every aspect of the
13 curriculum has a technology component. What we try to
14 infuse is -- I mean, everybody here I'm sure realizes
15 that it is a completely invaluable part of our
16 everyday lives now, where it wasn't maybe ten years
17 ago. Students, there are apps that we can use, which
18 are not even that expensive, that have students
19 polling themselves so that we can get instant
20 feedback, that kind of thing where on a much different
21 level we used to use response cards or things like
22 that. This helps our teachers to provide immediate
23 feedback to the students, helps the students to
24 realize what's going on; and that provides for a
25 quicker pace in the classroom, which is not something

1 that every single school can do, especially, for
2 example, on the Language Arts side where you need to
3 wait and grade essays and it takes time. These kinds
4 of things will speed that up. That is a innovation --

5 MS. ISLA-MARRERO: It provides the data in
6 order to differentiate instruction.

7 MS. FYE: Absolutely.

8 MR. MONTERO: Teachers are evaluated also
9 based on how they infuse technology in their
10 instruction.

11 MS. ISLA-MARRERO: Including it helps them
12 be familiar with EOC's and the FSA and all those State
13 testing that are mandated.

14 MR. FERGUSON: As a follow up to the
15 meeting, you don't need to find it now, but if you
16 could point us to where in the budget you have money
17 allocated for technology, because we didn't see it
18 offhand in reviewing the budget, a budget for --

19 MS. DIAZ: There's a line item.

20 MR. GIBSON: There should be a line item.

21 MR. FERGUSON: I don't want to take your
22 time now. If you could make a note to point us to the
23 line item.

24 MS. MCGINN: One of the things we had done
25 last year and I anticipate -- you know, I'm planning

1 we will do this year is every question we don't get
2 to, you had an opportunity to respond to in writing,
3 and we will do that again. That was actually very
4 helpful last year.

5 MS. FYE: There's another thing that I do
6 want to mention because it may not be budgeted for,
7 but we've also built in our school some really good
8 relationships with our vendors, for example, Reading
9 Plus, and they actually wrote a grant for a lot of the
10 Somerset schools to receive the program without cost
11 for a year or two. So some things may not actually be
12 in the budget, but that does not mean that they're not
13 intended to be used.

14 MR. FERGUSON: Fair enough.

15 MS. MCGINN: Moving to the Student Body
16 section. I believe that's Section 2. The proposed
17 middle school is going to have an entrance criteria of
18 the equivalent of a 2.0 grade point average. That
19 will be calculated basically equating an A to a four,
20 a B to three, et cetera.

21 Is that something that you have in place at
22 Somerset Academy and Charter Middle School currently?

23 MS. FYE: Not currently.

24 MR. MONTERO: No.

25 MS. MCGINN: Additionally, on Page 15 of the

1 application, the enrollment at maximum --

2 MR. MONTERO: I'm sorry. Can I --

3 MS. MCGINN: Sure.

4 MR. MONTERO: -- have follow-up in answer to
5 that.

6 MS. MCGINN: Absolutely.

7 MR. MONTERO: We don't have it as a
8 requirement to enter the school, but we do have it as
9 a requirement for them to perform. Students who fall
10 below a 2.0 will be placed on academic contract and
11 parents are brought in to make sure that we want them
12 to succeed. It's a collaboration between our progress
13 monitoring system for them to meet those goals. It's
14 kind of like we start the RTI process with anybody and
15 everyone. So students who -- they may not really fall
16 into the RTI track, they're just being lazy, but we
17 catch them and we whip them into the shape.

18 MS. FYE: So to speak.

19 MS. MCGINN: Yes, give them the little nudge
20 that they need.

21 MR. MONTERO: Yes exactly.

22 MR. GIBSON: One other follow-up.

23 MS. MCGINN: Yes.

24 MR. GIBSON: Just to answer, it's on Page
25 310 of the application, for the technical line item,

1 just so you'll see it.

2 MS. MCGINN: Thank you.

3 MR. FERGUSON: Thank you.

4 MS. MCGINN: It also states that the
5 application at the school's maximum enrollment there
6 will be 375 students. In looking at the information
7 about your high performing charter school, you're
8 serving a much larger population.

9 What kinds of -- given the fact that there
10 are more children, creating more funding, making that
11 funding available for additional resources, I guess
12 what kind of things do you anticipate would be
13 modified in a school that is less than 50 percent of
14 the enrollment that you all have?

15 MS. FYE: That's why we're so lucky that we
16 have this network of shared resources, because
17 something that we have -- When I started at our middle
18 school many years ago, I will not say, we did not have
19 anywhere near that number. We had a much smaller
20 population. From other Somersets, we were able to
21 share resources and ideas and if we had an issue on a
22 micro level, we had that campus-wide network; and now
23 on a macro level with the Somerset Academy network, we
24 are able to share those resources. We definitely
25 started at our high performing middle school very

1 small.

2 MR. MONTERO: Fifty students.

3 MS. FYE: So it's not unusual.

4 MR. MONTERO: I think 375 is still a
5 significant number. It is much smaller than ours, but
6 given how well we are performing and collaborating, I
7 think the replication is there, you just don't
8 replicate again, you know, the specifics. It's just
9 the concepts and those things that are needed by those
10 375 students are going to be targeted based on their
11 needs.

12 MS. MCGINN: Thank you. The application
13 states that the Governing Board may limit the
14 enrollment to target students who live within a
15 reasonable distance of the school.

16 As a governing board, what information would
17 you want to see in order to make that kind of a
18 decision?

19 MR. GERMAN: I think I can answer that. I
20 believe this was driven primarily in the permitting
21 process for the new school. I think there's a -- It's
22 done in phases and the City Council or the Planning
23 Department has asked for traffic studies along the
24 way. I imagine if the project was to drag out for a
25 long time and the neighborhood built up around it,

1 what was once no traffic problem could become a big
2 traffic problem. Hence, trying to get more kids that
3 are local. I think that's primarily driven by the
4 traffic study. As a board member, we would be --
5 that's the information we would be using and
6 keeping -- keep in tune with the local planning
7 department in the City. That may look a little odd,
8 but that I believe is what it was driven by.

9 MS. MCGINN: Okay. And that's the kind of
10 information you would be looking for?

11 MR. GERMAN: Yes.

12 MS. MCGINN: Okay. Moving on to the
13 educational program design, the Application states
14 that the school will follow some of the tenets that
15 have made the high performing school successful.

16 What steps will the Governing Board take to
17 hold the proposed charter school accountable for
18 ensuring that the educational program will be
19 substantially similar to the high performing charter
20 school?

21 MR. MONTERO: Rule one is professional
22 development, training the staff and sharing what has
23 made us successful so they can replicate the same
24 concept, the same model. Along with that is making
25 sure that we build a school from within. Bringing

1 parents is something that is in the picture. High
2 parental involvement is something that's very common
3 among all the Somersets and making sure that all
4 stakeholders have a say in the way the school is
5 evolving and shaping up.

6 I don't know if you want to add to that.

7 MS. FYE: Well, I know what the Governing
8 Board has with that, it would include also the things
9 that are sent kind of down the opposite way, which I'm
10 involved with down up, but up down would be more the
11 professional development comes about as a result of --

12 MR. MONTERO: Budget.

13 MS. FYE: -- the school report cards, the
14 budgets, the climate surveys that are done for all the
15 schools. And then as a result, they say okay, well,
16 look, these are the areas that we're seeing a trend.
17 The writing scores were down two years ago. We
18 developed a whole writing program to work on that. So
19 I mean it's their evaluation of where the strengths
20 and weaknesses are and addressing those system wide.

21 MS. MCGINN: Okay.

22 MS. FYE: Then, of course, if it's maybe one
23 or two schools, as you said, deploying the team.

24 MS. ISLA-MARRERO: And then those reports
25 are --

1 MS. DIAZ: As a board, we've contracted with
2 service providers who can provide us with information,
3 data driven, data information, climate survey results
4 and things like that to unsure that we have the
5 ability to oversee the entire organization. And then
6 we do refer to our organizational structure, which is
7 set up primarily to provide us with an overview of the
8 entire system.

9 MS. MCGINN: This question, as you were
10 responding, the Governing Board governs how many
11 schools?

12 MR. GERMAN: Fifty-seven.

13 MS. DIAZ: Fifty-seven successfully.

14 MR. MONTERO: Forty-eight in the State of
15 Florida.

16 MS. MCGINN: Okay, that explains the 48.
17 Thank you, I appreciate that.

18 The application talks about the College
19 Board's Springboard program as a supplemental program.
20 One of the questions that I had was how that's being
21 used at the current middle school in Broward County.

22 Do you use Springboard?

23 MS. FYE: Springboard has been used in
24 Broward County for many years.

25 MS. MCGINN: In your school. I'm sorry, I

1 should --

2 MS. FYE: In Broward County -- I was
3 explaining Broward County did use it specifically for
4 this purpose.

5 MR. MONTERO: They adopted it.

6 MS. FYE: They adopted it many years ago.
7 When the State came up with, I believe the course is
8 called Reading for College Success, Broward County
9 said this is the required curriculum for this course.
10 So we had adopted it then.

11 The middle school uses it. Like we said, we
12 have that pre-AP designation for the honor students.
13 That pre-AP, because College Board is the official
14 pre-AP curriculum for themselves, the College Board
15 develops the AP tests and approves the syllabus for
16 the AP programs, we said let's jump in with that, this
17 looks like the right thing. It's worked very well
18 with our students for that program.

19 MS. MCGINN: With regard to the curriculum,
20 one of the things that we saw, in reading through the
21 application, was that several curriculum tools,
22 programs were mentioned as something the school may
23 use. And so, in terms of assurances for us that the
24 curriculum will be substantially similar of the school
25 to be replicated, what kinds of things are you, as a

1 governing board, going to look for in terms of
2 assurances that the curriculum at this school is going
3 to be very similar to the curriculum of the high
4 performing school?

5 MS. FYE: Just to clarify with the "may be
6 used", our school is in Broward County, as we
7 mentioned, and there are district requirements because
8 we opt into our, for example, the reading curriculum,
9 our district's K-12 reading plan. So we didn't want
10 to overstep and say if your district has different
11 requirements. We also make sure that we follow all
12 the Florida required standards for all of that. So
13 there are differences when you're crossing county
14 lines, obviously. So that may explain some of the
15 ambiguity.

16 MS. DIAZ: So as a principal of a school,
17 programs come and go, they're named different things
18 every single year. When we, as a governing board,
19 oversee the development of the application, the
20 implication is that the programs will be the same for
21 both, whatever they are. We're not going to tell you
22 specific -- These may be the programs that have come
23 through that we may be using, but, as you know being
24 in the education world, things change on a yearly,
25 sometimes halfway through the year change. But at the

1 end of the day what our responsibility is to ensure
2 that Mr. Montero is using his resources appropriately
3 to ensure the replication of the school that he now
4 serves. That school is a very successful school and
5 there's no reason why we wouldn't be able to put our
6 trust in him, having done -- you know, having overseen
7 several other schools, knowing that he can actually
8 ensure that replication.

9 MR. MONTERO: This process has worked in
10 several other schools, multiple schools. We're
11 confident that it could work here.

12 MS. DIAZ: And has been successful up until
13 now.

14 MS. MCGINN: I guess to take this a little
15 further, in looking through the application, as I
16 said, several what appear to be full curriculums for
17 the same subject area were mentioned. Because the
18 school is going to open in 16/17, if approved, what
19 are you going to purchase, in terms of -- Because, you
20 know, if you're proposing that you may use two full
21 curriculum pieces, plans, which will you choose and
22 how will you decide?

23 MR. MONTERO: Well, we definitely would need
24 Miss Rains' input on that, right. She's the
25 instructional leader. And she would obviously look at

1 what the District of St. Lucie offers, because you
2 always want to be aligned with your sponsor. On top
3 of that, you have to make sure that you're meeting the
4 standards, the FSA standards. So it really depends on
5 a variety of things.

6 MS. FYE: A lot of variables. Even at our
7 school, we had to reevaluate when the State said
8 Common Core and then not Common Core, we want Florida
9 Standards and now we have EOC's to consider. So
10 there's obviously a lot of variables, but it would
11 definitely depend on the population of students,
12 what's going to work best for them. In the
13 replication, we're saying this is what's working for
14 us right now.

15 MR. MONTERO: We have used a multiple of
16 programs, but we definitely will sit down and narrow
17 it down to what will be the best for this population
18 and this school; and Miss Rains' input is valuable to
19 that.

20 MS. MCGINN: Okay.

21 MR. GIBSON: Again, a lot of those
22 recommendations are brought before the Board and so
23 the Board would take action on that so. And as our
24 Board is diverse, we have educators on our Board. So
25 they can talk or speak the same lingo and so we --

1 they're well informed that that process is presented
2 and they approve of that process.

3 MS. MCGINN: Okay.

4 MR. GERMAN: Does that answer your question?

5 MS. MCGINN: Yes, I believe it does.

6 Do you have --

7 MR. ZRALLACK: No, that's fine.

8 MS. MCGINN: Nick Zrallack is our curriculum
9 director.

10 MR. ZRALLACK: And that helps. I mean, how
11 you guys were framing it, in terms of -- Yes, program
12 names change all the time, but just looking at -- And,
13 again, some of those things were full curriculum.
14 Just trying to hear how you guys were pairing it
15 together. I mean, again, it makes sense, you're
16 looking at the local needs, as well so.

17 MR. GERMAN: I just want to make sure,
18 because what I'm seeing in this is that it really is
19 good to be sitting down talking about it because,
20 almost like in texts, things can come across very
21 differently and the written questions can be thought
22 of with a different tone and I want to make sure
23 answers are real. It seems -- if what we propose is a
24 little nebulous, of course, it is, it's a few years
25 away. But as long as you're happy with their answer.

1 I want to make sure when we walk out with as many of
2 these questions are answered as possible.

3 MR. MONTERO: It takes a lot of strategic
4 planning, a lot of hours, you know, looking at data
5 and, you know, things change all the time.

6 MS. FYE: Very hard to predict what the
7 State will decide for next week. I was thinking about
8 last year, at the beginning of the year we didn't know
9 all those students who were going to be taking that
10 FSA writing. Then, you know, not even midway through
11 the year, I think it was February that they decided
12 juniors would not be taking the FSA writing or any of
13 them. Things change constantly. We make the best
14 decisions based on our needs assessments, the students
15 that we're serving, for the purposes that we're trying
16 to achieve.

17 MS. DIAZ: And as far as the Governing Board
18 is concerned, the strategic planning meetings that we
19 do conduct really provide us with all the information
20 that we need to make the best decisions until they
21 finally do come up to us, for example, in terms of
22 technology programs that they want to add because of
23 the next thing that's coming out. We're going to make
24 those decisions based on the results of those
25 meetings.

1 MS. MCGINN: Okay. The section with regard
2 to Student Performance, Assessment and Evaluation, I'm
3 going to paraphrase this question. I think I should
4 probably just read it.

5 The stated expectation that student academic
6 performance will meet or exceed state or district
7 averages is discussed throughout Section 5. At the
8 high performing school, and congratulations, you
9 repeatedly exceed the state and district average in
10 double digits. I was extremely impressed.

11 MR. MONTERO: Thank you.

12 MS. FYE: Thank you.

13 MS. MCGINN: I guess what we were
14 questioning is meeting state or district average,
15 whichever is higher, doesn't reflect the clear
16 academic performance, high degree of academic
17 performance in the school to be replicated.

18 How can you square that difference in terms
19 of setting expectations? I understand you want to set
20 reasonably high expectations, but why the difference
21 in terms of the state average versus, as I've said, at
22 least ten percentage points above the state average in
23 terms of student performance?

24 MS. FYE: In the replication, we are talking
25 about what we have done to build us to this level.

1 That was not the expectation our first year,
2 obviously. So that's something that we've built up
3 to. And we still expect that the students will
4 achieve a certain level. That is the expectation.

5 To be fair, that is difficult to make
6 without a baseline, without knowing your students or
7 anything like that, but it is an expectation that we
8 have and we maintain. Like Mr. Montero said, about
9 just like with the GPA's, it's an expectation that we
10 provide to our students. How we get there is we
11 ensure that we are assessing our students from the
12 beginning. We get to know their needs and we address
13 those needs as adequately as possible.

14 MR. MONTERO: Our goal will drastically
15 change the second year.

16 MS. FYE: Absolutely, once we have --

17 MS. DIAZ: And as a governing board, we
18 expect to see those baseline scores and develop a goal
19 based on that information. But, as you know, the
20 State hasn't even decided what they consider standard
21 at this point. So to be, you know, flexible in saying
22 meet or exceed I think is more than adequate.

23 MR. GERMAN: Yeah, I don't see -- It wasn't
24 a hedge. It's simply realistic and I think maybe you
25 guys read more into it than was there.

1 MS. DIAZ: Right.

2 MS. MCGINN: As a follow-up question, what
3 expectations do you have, as a governing board, given
4 that this is the beginning of the school, working with
5 a very high performing school in terms of academics,
6 do you see the relationship continuing beyond the
7 first year, in terms of replication, in terms of the
8 school working with the proposed charter school during
9 that first year and second year?

10 MS. DIAZ: Well, our track record indicates
11 that all of our schools work together and they're not
12 necessarily replications of each other. So the
13 intention is always for the Board to collaborate as a
14 Somerset incorporation to ensure the success of all of
15 our schools. We're specifically picking this school
16 as a replicating school because of its high performing
17 status. So as long as the results from the new school
18 indicate that same high performing status, we'll
19 continue to replicate.

20 MR. GERMAN: My take would be that Bernie
21 will continue to have input and replicate until Miss
22 Rains starts beating him.

23 MS. MCGINN: Now, there is a standard of
24 performing.

25 MR. GERMAN: That really is where it comes

1 down to. We, as a board -- It's like anything, you
2 pat the people that are doing great on the back, but
3 you really spend your time on the people that need the
4 help. And the people that -- once they're high
5 performing, they take care of themselves, because
6 they're competing against each other; and we have a
7 very competitive group. I guarantee that will -- If
8 you didn't know that's the goal, that's the goal.

9 MS. DIAZ: And we like it that way.

10 MR. GIBSON: Miss Rains may end up
11 constantly giving Bernie some information about how to
12 perform better.

13 MS. FYE: Let's not get crazy.

14 MS. MCGINN: Moving on to the section with
15 regard to exceptional students. We -- And, again,
16 this was a question previously, in terms of getting a
17 clear understanding of how students with disability
18 needs will be met within the proposed school.

19 What is the Governing Board's expectation,
20 in terms of the range of services that will be
21 provided at the proposed school?

22 MS. DIAZ: The range of services is always
23 going to be dependent on the child's Individual
24 Education Plan. There's no way we can identify a
25 specific disability and say we're going to provide

1 this for that disability. That's not how it works in
2 ESE. Your services are a hundred percent dependent on
3 what the student -- Now, not knowing the students we
4 have, we have to work off averages, what the district
5 looks like, what the population has, so we can budget
6 for the appropriate supports that we need. However,
7 the services will always be determined by the IEP.

8 MR. TOMLINSON: If I can just add some
9 follow-up to that, I'm over Exceptional Ed for the
10 District, Bill Tomlinson.

11 In your application it says that all
12 services are basically provided in the general
13 educational program, that there is nothing beyond
14 that. So if there's nothing beyond that, how do you
15 meet the unique needs of children with disabilities?

16 MS. DIAZ: We can go beyond that.

17 MS. FYE: Yeah, it should say that there's a
18 continuum of support that's provided because that's --
19 First of all, we do provide inclusion in the general
20 education classroom to give the student the highest
21 level of challenge within the general education
22 classroom --

23 MR. MONTERO: In the least restrictive.

24 MS. FYE: -- in the least restrictive
25 environment. It should also mention, and I believe it

1 does, that there is a continuum of support and, like
2 Miss Diaz said, that would include whatever is stated
3 on the IEP, but there is budgets for I think -- I was
4 just saying that I believe that in even in the budget
5 that there's a mention of either the special education
6 teacher or the assistant -- I can't think of the word
7 right now -- as well as the contract for speech and
8 language services --

9 MS. ISLA-MARRERO: Occupational therapy.

10 MS. FYE: -- occupational therapy.

11 MR. TOMLINSON: As a follow up to that --

12 MS. DIAZ: Our expectation is that we meet
13 the needs of the child, regardless of what those needs
14 are.

15 MR. TOMLINSON: So if a child needs a
16 service that cannot be provided in the general
17 education classroom, you're equipped to provide those
18 services in a resource setting or a more restrictive
19 setting, such as a separate class?

20 MS. FYE: To an extent depending on the
21 needs identified in the IEP.

22 MS. DIAZ: Right. We can't possibly come up
23 with every single scenario out there. For example, I
24 have a student who's blind in my school and I service
25 her perfectly fine in the general education

1 environment. So it's not about what the child has,
2 it's what the child needs and how we can work with the
3 families to ensure they're in the best setting.
4 That's the expectation, as a Board member, that I have
5 for all the schools that we service is that they work
6 with the families to ensure the best setting. And
7 that setting doesn't necessarily have to be at the
8 school, that setting could be somewhere else. But for
9 the most part we work with those families to ensure
10 they are in the best setting for that child's
11 education environment.

12 MR. MONTERO: At the high performing school,
13 our ESE specialist and ESE staff works really closely
14 with the district and they have a great relationship.
15 You know, it's about serving the needs of the child,
16 whether it's at our school, because the parents choose
17 to be at our school, or in the district environment
18 where those needs are met. So it is a collaboration
19 between the district, our staff and the parents to
20 decide what best fits that child.

21 MR. TOMLINSON: So just for clarification,
22 I'll ask again, are you able to provide a full
23 continuum of services for children with disabilities?

24 MS. DIAZ: Absolutely.

25 MS. FYE: Just to clarify, it is here in the

1 application regarding when students do require a more
2 restrictive learning -- or when they have a more
3 restrictive learning environment that the IEP team
4 would meet and discuss how to best serve those. It's
5 on Page 102.

6 MR. TOMLINSON: I read that. The question
7 about a full continuum of services is what are you
8 providing at your own school for children with
9 disabilities. Full continuum is defined as those
10 services provided in the general ed program, services
11 provided in pull-out, not speech therapy, not
12 language, but specialized instruction --

13 MS. ISLA-MARRERO: If the team decides --

14 MR. TOMLINSON: Let me finish.

15 -- specialized instruction in a separate
16 class setting for resource, if necessary, or into a
17 separate setting.

18 MS. FYE: If we're replicating what is at
19 our middle school, that is exactly what we have. We
20 do have our resource room. We have ESE specific
21 teachers and we do have a push-in and pull-out for
22 those students. So we are prepared to say yes to that
23 because we know that is exactly our school.

24 MS. ISLA-MARRERO: The bottom line is what
25 the team decides for the child.

1 MR. FERGUSON: I think part of our confusion
2 is Page 102 you struck through those two parts and you
3 only left the part that said that students with
4 disabilities whose needs can be met in a regular
5 classroom environment at least 80 percent of
6 instruction occurring in a class with non-disabled
7 peers. So that in our mind --

8 MS. FYE: With the provision of reasonable
9 supplementary supports and services and modifications
10 to select from that list.

11 MR. FERGUSON: Yes, but that's a limitation.

12 MR. TOMLINSON: That's not a continuum of
13 services.

14 MR. FERGUSON: Correct. That's why we were
15 raising --

16 MR. TOMLINSON: If it's all general ed,
17 that's all that you can get in your school.

18 MS. DIAZ: We're required to choose one of
19 these, correct? From my understanding, this is the
20 minimum we can, but we can do. So this is the
21 minimum. And that was an argument that we had at
22 our --

23 MS. MCGINN: You can do more?

24 MS. DIAZ: Right. So it was determined
25 that, in fact, this is the minimum. So then providing

1 other services as deemed appropriate by the IEP would
2 be considered a continuum of services that we can
3 provide. Correct?

4 MS. MCGINN: I think our concern is that as
5 defined as a minimum, where does the maximum occur?
6 Our expectation is that a continuum of services is
7 going to be provided. As you said, the Governing
8 Board expects that based on what a child needs, we may
9 go beyond this.

10 MS. DIAZ: Correct.

11 MS. MCGINN: We want students to have the
12 assurance that the school will go beyond that, if
13 their individual needs require that. That wasn't
14 clear when you struck those two other paragraphs out.

15 MR. TOMLINSON: It becomes unclear if the
16 last paragraph on the page --

17 MS. DIAZ: The application is requesting a
18 choice. That's why those two paragraphs are struck
19 out.

20 MR. TOMLINSON: For students that require a
21 more restrictive learning environment --

22 MS. DIAZ: You have to choose one. Sorry.

23 MR. TOMLINSON: -- for example, resource or
24 separate class setting to support their educational
25 needs, an IEPT meeting will be held with the staffing

1 specialist, a representative from the student's zoned
2 school and the child's parents to discuss the
3 appropriate educational placement.

4 So when you're bringing in someone from the
5 child's zoned school to discuss placement outside of
6 the general ed, it almost appears there's a
7 predetermination that it will not be serviced.

8 MS. FYE: That it cannot be serviced.

9 MS. DIAZ: I see it as a collaborative
10 effort between the school and the district to find the
11 most appropriate setting for that child.

12 MR. TOMLINSON: I see it as the opposite.
13 We disagree on that.

14 MS. DIAZ: As a principal when I work with
15 my district and we sit at the table, that's always
16 what comes up. It's how -- what is it about this
17 child, how can best service this child. In honesty,
18 as a charter school principal, I much rather service
19 them at my school. However, if I know that there's a
20 better program out there, my interest is always that
21 of the child's. So I will always invite whatever
22 expertise we can get from the outside from our
23 district to work hand in hand with them to ensure that
24 that child is given the best services.

25 MS. FYE: It may be a difference in policies

1 in the district, because in Broward County that is
2 what we're expected to do, as well, is that we do have
3 district representatives from Broward County schools.

4 MR. TOMLINSON: Thank you.

5 MS. MCGINN: In looking -- I'm going to jump
6 ahead a little bit because we do only have ten minutes
7 left. In looking at the governing -- Page 3, excuse
8 me, Section III, in terms of governance, the
9 application states that one of the Governing Board's
10 duties is to exercise continuing oversight over the
11 charter school operations, but doesn't really provide
12 any detail in terms of the specific activities you, as
13 a governing board, engage in to make sure that the
14 operations are being performed as you expect.

15 At the same time, what kinds of additional
16 things will you, as a governing board, do to make sure
17 that the program in the proposed charter school
18 substantially matches what's being offered at -- or
19 what's being implemented operationally at the high
20 performing school that is proposed for replication?

21 MR. GERMAN: I can start on some of the just
22 general board governance. Just like your school
23 board, we do monthly -- every school respectively puts
24 through their budget and we hire -- well, we approve
25 all the hiring of principals and senior staff. All

1 the various reports on the personnel go through us.
2 Now, as I said earlier, our super high performers get
3 pats on the back. But as a board we always want to
4 know about our babies, our new ones. So I guarantee
5 this will be the topic of every board meeting until it
6 doesn't need to be and that's standard. I mean, any
7 of our new schools, just like you guys would, they're
8 where all your attention goes. I don't know that we
9 have a written policy that you give -- that you love
10 one child more than the other, but that's the
11 practicality of it.

12 As far as the technical stuff, these guys
13 might be able to talk about that.

14 MS. DIAZ: We spoke to this a little earlier
15 about the strategic planning meetings where we get a
16 lot of the information about the schools that are
17 having the most difficulty or issues that come up and
18 we're able to really look and delve into individual
19 schools and their individual problems that provides
20 that oversight to make sure that we are putting our
21 resources where they need to be to ensure the success
22 of our all schools.

23 MR. GERMAN: If I can follow-up on that. We
24 have our regular board meetings and then we have a
25 precursor to almost all those is a strategic planning

1 meeting. The board meetings may be an hour. The
2 strategic planning meetings are three hours. There
3 again, they're open meetings -- you know, they're
4 publicly noticed, open meetings. That's where get
5 into the nuts and bolts. Each respective principals
6 come to us with their problems, we deal with them so
7 that the work gets done there, then goes to the big
8 board meeting.

9 MS. MCGINN: Do you anticipate looking at
10 any different kinds of data points specific to okay,
11 we have this high performing charter school, we have
12 this school that is a replication? What kinds of
13 things do you, as a governing board, see your
14 discussion including that would address that specific
15 scenario?

16 MS. DIAZ: I'm not sure your question is --
17 Are we looking for the success of the new school?

18 MS. MCGINN: I guess what I want --

19 MR. GERMAN: I think I get your question.

20 MR. FERGUSON: Okay.

21 MR. GERMAN: I would -- It's very simple.
22 I'd task Bernie and say how's it going and if he says
23 it's going to great, I want to know why.

24 MS. MCGINN: Okay.

25 MR. GERMAN: Show me, are they up to your

1 standard yet? How are we on student enrollment, how's
2 your budget looking?

3 MS. ISLA-MARRERO: And if not, why?

4 MR. GERMAN: The same types of things. I
5 mean that's --

6 MR. MONTERO: I think the Governing Board
7 does a great job. If not, why. It's more like if
8 not, what do you need?

9 MR. GERMAN: Good point.

10 MR. MONTERO: What do you -- how can we
11 support you, make sure that this school is where it's
12 supposed to be or is exceeding the expectations that
13 we first, you know, set aside. So I think the
14 Governing Board, it's a very -- It's a great process
15 because there's a lot of support from top down, from
16 the Board to myself, to the strategic planning
17 committee, then to the principals and the principals
18 then take it and run with it.

19 MS. MCGINN: Okay. I am going to --
20 Actually, again, what's the Governing Board piece, the
21 governance piece? There is a section at the -- or a
22 couple paragraphs at the end of the section that talks
23 about how the Governing Board addresses disputes that
24 parents may have.

25 Have you had parents come to Governing Board

1 meetings and discuss concerns they have at the school?

2 MS. DIAZ: Absolutely. I've even gotten
3 phone calls from San Antonio, Texas, parents asking to
4 speak to me directly because whatever concern they
5 weren't able to resolve and I, as the principal of the
6 school, will happily answer that phone call, find out
7 what's going on, have my people in place and we take
8 care of the problem. But to avoid that, for the most
9 part, we do have a parent liaison that's assigned to
10 each of our schools that serves to be that person
11 between to kind of get the story behind exactly what
12 the complaint is, what the issues are and what the
13 school has done to rectify it.

14 MS. MCGINN: What is the involvement that
15 your ESP, your service provider, Academica, has in
16 terms of that process?

17 MR. GERMAN: For parent disputes?

18 MS. DIAZ: They don't need to be involved.

19 MR. GERMAN: That wouldn't be their thing.
20 That's really -- that's why we get paid the big bucks,
21 nothing, to deal with those kind of political -- I
22 would almost consider it a political problem. You
23 have someone that's very unhappy and they want talk to
24 you. You can't outsource that.

25 MS. MCGINN: I guess the reason we were

1 asking is that, at a point within the structure, it
2 talked about talking with the ESP before it came to
3 the Governing Board.

4 I just was -- Did I get that incorrectly? I
5 guess I was just wondering how that -- it doesn't
6 sound --

7 MS. DIAZ: I consider it another resource,
8 but it wouldn't be considered a parent liaison.

9 MR. GIBSON: Well, the parent isn't
10 prohibited from calling our Board member. There's not
11 a procedure in place that says, look, you have to go
12 to the principal, then you have to go to the ESP, then
13 you can go to the Board members. As you all know, our
14 Board members' telephone numbers aren't listed, but
15 definitely their e-mail addresses are listed. So a
16 lot of times parents would e-mail our Board members
17 directly or if they have -- or if the principal feels
18 that they want to make sure that a voice is heard,
19 they'll give maybe one of the Board member the
20 telephone number, ie. then our Board members will get
21 a call.

22 However, there is no barrier per se that
23 says that you have to call the management company
24 first or the ESP or the principal. They can call our
25 Board members directly --

1 MS. ISLA-MARRERO: They have my phone number
2 and called many times.

3 MR. GIBSON: -- and they have believe me.

4 MR. MONTERO: I deal with a lot of that.

5 MR. GIBSON: That's true. That's true.

6 MS. DIAZ: There's going to be at least one
7 parent liaison identified for each school that is
8 clearly the person to go to and that person can be a
9 parent at the school, it can be another principal at
10 another school, somebody who's familiar with the
11 education environment, but also, you know, can provide
12 that assistance, that mediation in the middle.

13 MS. MCGINN: Okay.

14 MR. MONTERO: Try to filter it, you know,
15 try to make sure that I can deal with it and work with
16 the principal to compromise, come up with a solution.
17 Also, the vice president of Somerset, she's not here,
18 she does a great job in helping me when I can't get to
19 those situations. But, for the most part, we don't
20 get a lot of parents and a lot of complaints at the
21 board meetings.

22 MS. MCGINN: Handling issues at the lowest
23 level possible, sure.

24 MR. MONTERO: Yeah.

25 MS. MCGINN: With regard to the facilities

1 plan, as I think you had said, you are going through
2 the process in terms of -- I believe the City has
3 given you site approval.

4 MR. GERMAN: Which specific?

5 MS. MCGINN: I'm sorry, I'm on Page 4.

6 MR. FERGUSON: She skipped a few questions.

7 MS. MCGINN: Yeah. And the reason I did
8 that is because again --

9 MR. GERMAN: No problem.

10 MR. MONTERO: Can we just go back real
11 quick.

12 MS. MCGINN: Sure absolutely.

13 MR. MONTERO: She's pointing something out
14 to me that I think is important.

15 MS. FYE: I'm sorry. I think I see where
16 you guys were talking about that on Page 153 where it
17 says, Step III contact Educational Support Provider,
18 the word Support and ESP are capitalized, but I just
19 didn't want there to be a miscommunication, because it
20 doesn't say educational service provider. I'm
21 wondering if that's where the miscommunication is.

22 MS. MCGINN: It absolutely is because
23 several places in the application Academica is
24 referred to as the ESP.

25 MS. FYE: As the ESP. And I see that E, S

1 and P are capitalized, but that's not what the ESP we
2 are referring to represents.

3 MS. MCGINN: Thank you.

4 MR. FERGUSON: What does it represent? What
5 is an Educational Support Provider.

6 MS. FYE: I'm thinking at that level,
7 because of the structure that was just described,
8 student teacher, school administrator, the next step
9 is Mr. Montero, the president, and then bring it to
10 the Board.

11 MR. GIBSON: To add to that, any parent can
12 get on the agenda of the school board. So if they
13 talk to Mr. Montero or they talk to one of the Board
14 members individually and they didn't like what was
15 heard, but they want to get it heard through a general
16 body, they can request and we are obligated to have
17 them on our agenda, as long as it's done timely. And
18 then we hear them and they have 15 minutes to speak --
19 I'm sorry -- three minutes to speak.

20 MR. FERGUSON: You're being way too
21 generous.

22 MR. GIBSON: When I said 15, I almost had my
23 Board members correct me.

24 MS. MCGINN: Out of curiosity, do you
25 then -- if a parent is concerned and wants to speak to

1 the Board from Port St. Lucie, what accommodations do
2 you make if you're not meeting in the county?

3 MS. DIAZ: We have video teleconferencing.
4 We have phone conferencing. We always have a line
5 open. We always have an area where parents can meet
6 also.

7 MR. GIBSON: In the county where the
8 school --

9 MS. ISLA-MARRERO: And we do have the two
10 where we --

11 MR. GERMAN: We try to move around as much
12 as possible.

13 MS. ISLA-MARRERO: I know, I know.

14 MS. MCGINN: I apologize, but on Page 4 at
15 the bottom it talks about the back-up facilities
16 plant. As I said, from discussions with the City, the
17 site plan has been approved.

18 If the building isn't approved -- or isn't
19 up and running by August of 2016, what's the plan, in
20 terms of accommodating students? There was discussion
21 about putting portables in place on the existing
22 leased facility.

23 What kinds of things has the Governing Board
24 done in terms of looking at that plan as something
25 that would be viable as a Plan B?

1 MR. GERMAN: Well, I guess my question would
2 be why wouldn't that be viable? We have relationships
3 with different providers that could -- Getting the
4 actual buildings isn't difficult and because it's on a
5 community college campus, they're a self-permitting
6 agency. We've already talked to them about it. So
7 there's virtually no process to go through. Hopefully
8 that -- I mean, it's a backup plan. It would be not a
9 beautiful, wonderful plan, but if we needed to make up
10 for a couple of months, we could do it without having
11 to go -- That's one of the great things of being on a
12 State college campus, that they're their own
13 permitting agency.

14 MS. MCGINN: So you've gotten assurance that
15 they would let you do that, if you needed to?

16 MR. GERMAN: That one I would want -- I
17 believe so and I'd want to defer to Miss Rains.

18 MS. RAINS: We have a year-to-year lease
19 with IRSC that's renewable for up to the next five
20 years and the next most recent approved lease does
21 allow for portables.

22 MS. MCGINN: Okay, thank you.

23 I'm looking at the questions that would be
24 more appropriate to answer in writing, because they're
25 looking for that kind information. I think several of

1 them we'll be able to answer based on the documents
2 that you all provided. Thank you very much for doing
3 that. As I said to Miss Rains earlier, we did receive
4 everything that you had sent. So thank you.

5 In terms of Section 18, Management and
6 Oversight, the last bullet, it's Page 5, in looking at
7 the information that was provided on the Addendum C,
8 Schools Previously Operated by the Management Company,
9 Academica, Somerset Academy Charter Middle School, the
10 fund balance for 2014 is seven percent. The fund
11 balance for Somerset College Preparatory Academy is
12 two percent.

13 What is your target fund balance for a
14 school, I guess is the first piece; and then the
15 second question is what kind of things are you, as a
16 governing board, willing, I guess, to do to support
17 the school should it not be financially viable?

18 MR. GERMAN: I can give you a personal
19 experience of this.

20 MS. MCGINN: Okay.

21 MR. GERMAN: I got involved with Somerset
22 through -- I was the -- I've been in charter schools
23 for awhile from the governance side. I was the
24 chairman of a Montessori charter school down in Key
25 West and then a new high school opened and was a train

1 wreck. And a very good friend of mine, who's on the
2 State Board of Education, he asked me to come in and
3 help. So within 15 minutes of my first meeting, I was
4 the chairman. It was --

5 MS. MCGINN: That was helping.

6 MR. GERMAN: It was an absolute disaster.
7 Had never heard of charter school management companies
8 or any of this. I called a guy at the time, Mike
9 Cooley (phonetic) was the head of all charters in
10 Florida, he gave me some names and I started cold
11 calling them. Within three days, Somerset and
12 Academica had 12 people in Key West, which quadrupled
13 our staff. And over the next couple of years, they
14 either granted or loaned us tens of thousands of
15 dollars and hundreds of thousands of dollars in
16 manhours and the rest to make it work.

17 We were completely on our feet. Things were
18 looking good and we had a terrible tragedy with a
19 principal. The cavalry came again. And I'm happy to
20 say the school is running very well now. We're a
21 Somerset school and things are going very well.

22 You can say what you want, but when the
23 rubber hits the road is what people do. Financially
24 it had to be a disaster for them to come throw so much
25 help to us. Most of that we could never repay. Part

1 of why I feel so obligated to help them, because they
2 were so good to the kids. And that really is -- You
3 know, sometimes I get frustrated with the back and
4 forth of traditional school systems and charters and
5 the rest, but it is all about the kids in the end.
6 And I think if we keep that in mind, we can smooth a
7 lot of rough road.

8 But that was -- That's my testimonial of
9 what they're prepared to do. And I know now also that
10 I get to -- I have some control of writing the check.
11 There's no way the school fails.

12 MS. MCGINN: Just so that I'm clear, the
13 expectation would be that Somerset at least would have
14 Board discussion about taking some of the dollars that
15 are generated from efficiently performing schools or
16 another --

17 MR. GERMAN: Absolutely.

18 MS. MCGINN: -- funding source?

19 MR. GERMAN: Plus Somerset Incorporated has
20 its own budget to be able to help out other schools.
21 We can loan it and then get it back or give bridge
22 loans and the same with Building Hope. We have a
23 number of affiliates that are passionate about charter
24 schools, especially one that's set to be as good as
25 this.

1 MS. ISLA-MARRERO: He only gave you one
2 example of Key West, but we've also done it in
3 Jacksonville, San Antonio.

4 MR. GERMAN: That was just mine. I can
5 speak from personal experience that they came down.

6 MS. MCGINN: So Building Hope is something
7 that you, as a board, use, if you will, as an
8 affiliate when you have a school -- you're looking for
9 lines of credit?

10 MR. GIBSON: We've used them in the past.

11 Just to add to that point about the
12 financial success, through the year 13/14 it was I
13 believe -- I'm not sure if the two percent represents
14 the -- at least in my review, because I looked at the
15 question as well, there was \$451 as a end-of-year
16 balance, but when you look at this year's, the 2014/15
17 the school -- the current school that's here is at
18 67,000. So we have a track record. And those
19 financials haven't been -- I'm not sure if it's been
20 forwarded to you or not, but we're completing our
21 audit.

22 MS. MCGINN: We received it, yes.

23 MR. GIBSON: Oh, you received it, okay. So
24 there is a track record since we, Somerset, Inc. has
25 been involved from moving the financials in a positive

1 direction.

2 MS. MCGINN: The two percent just for
3 clarification is the --

4 MR. GERMAN: Unreserved fund balance.

5 MS. MCGINN: -- unreserved fund balance for
6 the 13/14 school year. The \$450 was the unreserved
7 fund balance from the first year of operation.

8 MR. GIBSON: So if you haven't received the
9 financials -- I mean we're obligated to turn them over
10 to you anyway, so you'll see it -- but you'll see the
11 progression in terms of 450. So we can -- our Board
12 can say -- And these are unapproved financial reports
13 because it hasn't gone before our Board, but I can
14 say, since I reviewed them, that there is a track
15 record of a positive -- I don't even know what the
16 percentage would be from 451 to 67,000, but that's --
17 I don't think we'll be making those type of jumps
18 every year, but I do believe that we will be having
19 those increases and I think because of the leadership
20 of the staff, the Governing Board, that we'll see
21 those increases in the new school, as well.

22 MS. MCGINN: All right. I apologize for
23 keeping you ten minutes longer than --

24 MR. MONTERO: Not at all.

25 MR. FERGUSON: One quick follow-up question.

1 I want to make sure I understand. You had sent me to
2 Page 310 for the technology budget.

3 MR. GIBSON: Right.

4 MR. FERGUSON: And I see a line item that
5 says computer equipment for instruction, parentheses,
6 lease. If I'm reading this, it's budgeted at \$1500
7 per classroom.

8 Is that right?

9 MR. GIBSON: There is a -- if you look
10 further down, we talk about digital education per
11 student -- I mean, not further down. You said
12 computer equipment and instruction, but when you go up
13 there is a digital education content material lease
14 and that's \$150 per student.

15 MS. DIAZ: That would include programs.

16 MS. MCGINN: First, before you do that,
17 maybe we don't need to hear from Miss Rains, as a
18 board, recognizing that you have an expectation in
19 terms of technologically rich academic programs, do
20 you have a budget amount that you look for in a budget
21 like this once it's been prepared?

22 I mean, I'm making an assumption here and it
23 may not be a fair assumption, but you had an
24 opportunity to vet this before it was presented.

25 So, as a governing board, what kind of

1 things did you discuss or look for, in terms of the
2 application, to make sure that those kinds of things
3 were taken into account when the application was
4 finalized and put forward to us?

5 MS. FYE: Just to clarify real quick,
6 because I want to be clear, a lot of the curriculum
7 components do provide, within the price of whatever
8 the textbook is, an equivalent digital or
9 technological component. So that may seem like a low
10 number. I was thinking I spent a lot more than that
11 on the kids per kid. But that's not considering the
12 physical textbook that comes with the digital
13 component.

14 MR. FERGUSON: No, I understand. I was
15 actually focusing more on hardware costs.

16 MS. FYE: Hardware not software, okay.

17 MS. DIAZ: As a governing board, we look at
18 our averages of what our schools need. I mean, I have
19 a school. I know what a technology rich school looks
20 like. I know what the expectation is. I know what
21 the upfront costs are.

22 So when we review things like this these are
23 the expectations I'm looking for. So as the
24 educational expert or experts on the Board, we have
25 that knowledge to say, you know what, this will

1 suffice and this is going to be a very program for
2 technology. To be exact, prices change.

3 MS. MCGINN: Absolutely. We're not looking
4 for \$412.35.

5 MR. GERMAN: As I replicated school -- I was
6 trying to make up a word there but -- I would expect
7 to see the same or newer and better stuff than what is
8 currently at Bernie's school. That's what the model
9 is.

10 MS. DIAZ: And often cheaper.

11 MS. MCGINN: Yes. Yes.

12 MR. FERGUSON: In all fairness, I'll let
13 Miss Rains clarify, because what I'm reading is that
14 there's a hardware budget of \$1500 per classroom.

15 Is that not correct?

16 MS. RAINS: If you'll look at the Appendix F
17 on that budget page, there's about four different line
18 items where technology is factored in, both hardware
19 and software, digital content, et cetera. That's
20 going to come under the instructional technology
21 itself, there's a line item specific to instructional
22 technology. There's a digital content line item.
23 There's instructional material line item and I believe
24 there's a CIRP line item.

25 MS. DIAZ: The what?

1 MS. RAINS: The CIRP line item that should
2 be on there, as well. Yeah, and that's on there as
3 well. So the dollar amount per student, off the top
4 of my head, I don't know. I'd have to have a
5 calculator and use this, but there are multiple line
6 items where the technology is referenced in the actual
7 budget. And that will come from that --

8 MS. ISLA-MARRERO: There's three line items
9 per student and then there's an additional classroom.

10 MR. FERGUSON: I see that. So where it
11 says, for example, digital education content materials
12 leased, that also has a hardware component in that, as
13 well as software?

14 MS. RAINS: Yes. Like Miss Fye was saying,
15 the digital content itself, the content, the
16 textbooks, the online textbooks, that comes from the
17 publishers. That's part of the instructional
18 materials cost. So when you see a separate line item
19 for digital content technology, that's hardware, as
20 well.

21 MR. FERGUSON: Okay.

22 MS. ISLA-MARRERO: And you can't run the
23 software without the hardware anyway.

24 MR. FERGUSON: Well, but --

25 MS. FYE: There may be -- just from a

1 curriculum side, there may be content, for example,
2 that we purchase, that the students use their own or
3 it could be things that are brought in. Classroom
4 materials -- or excuse me -- classroom supplies and
5 equipment would include, you know, promethean board,
6 could include the projectors, could include their
7 being used in the classroom as well, could include
8 clickers or depending on what it's called. I think
9 it's subject to --

10 MS. MCGINN: I apologize, a couple of our
11 folks had to leave. So I appreciate you coming. As I
12 said, what I will do is clarify -- not clarify, but
13 confirm with Miss Rains, unless you ask me to contact
14 someone else, since she's the official contact within
15 the application, just to confirm these are the
16 questions we didn't have an opportunity to discuss;
17 and if you all want to provide written answers, we
18 would certainly like that, because that gives us more
19 information about what's included in the application.

20 MR. GERMAN: No other burning questions you
21 can knock out in five minutes?

22 MS. MCGINN: No, but if I think of any, I
23 will make sure --

24 MR. GIBSON: When can we have -- Is there an
25 expectation of when a decision will be made or a date

1 or something like that?

2 MS. MCGINN: Yes. And I'm going to be going
3 from memory and that's never a good thing to do. The
4 plan is that we will make a recommendation to our
5 school board the last meeting in September.

6 MR. FERGUSON: Which is September 22nd.

7 MS. MCGINN: We're required to have that
8 recommendation to the board eight days prior.

9 MR. FERGUSON: It's the Friday before the
10 Tuesday before the meeting. So whatever date that is.

11 MS. MCGINN: Then it's published publicly
12 seven business days?

13 MR. FERGUSON: Eleventh. Yeah, September
14 11th would be the agenda item would be finalized.
15 Agenda is published that following Tuesday, the week
16 before the board meeting.

17 MS. MCGINN: There's also a requirement
18 within our school board policy that says that we
19 provide information to the Governing Board eight days
20 in advance, to allow you to provide comment based on
21 the things that we have questions about or have found
22 through our application review initially. So, in
23 other words, we say okay, here's what our staff
24 evaluation is. We're going to give that to you ahead
25 of time, so you can have an opportunity to comment.

1 MR. GERMAN: That give us enough time? If
2 the meeting is on the 22nd and you have to publish it
3 eight days before that, you have to give our answer to
4 us eight days you publish it?

5 MR. FERGUSON: We have an internal agenda
6 deadline of September 11th that Friday before the week
7 ahead.

8 MS. MCGINN: So yes, we will work eight days
9 in advance of that, actually further than that to give
10 you an opportunity to respond.

11 MR. FERGUSON: So we will endeavor to get
12 you --

13 MR. GERMAN: That's next week.

14 MR. FERGUSON: Yeah.

15 MR. GERMAN: I'm not trying to be -- I'm
16 just doing the math. We'll get our stuff back to you
17 quick.

18 MS. MCGINN: Our calendar is blocked out so
19 that we have an opportunity to get this finished.

20 MR. FERGUSON: So that your comments on the
21 staff recommendation can be incorporated into the
22 agenda item, so the school board has full information.

23 MR. MONTERO: All these dates, of course,
24 are dependent upon what happens with Erika.

25 MS. MCGINN: Oh, good lord. Yes,

1 unfortunately.

2 (Thereupon, at 11:18 a.m., the meeting was
3 concluded.)

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CERTIFICATE OF REPORTER

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 : SS
COUNTY OF MARTIN)

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I, MARCELLA R. SAMSON, a Shorthand Reporter and Notary Public of the State of Florida at Large, certify that the foregoing meeting was stenographically reported by me and is a true and accurate transcription of said meeting.

I certify further I am neither attorney nor counsel for, nor related to, nor employed by any of the parties to the action in which the meetin is held and, further, that I am not a relative or an employee of any attorney or counsel employed in this case, nor am I financially interested in the outcome of this action.

DATED this 31st day of August, 2015.

Marcella R. Samson



MARCELLA R. SAMSON

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Exhibit 4.	St. Lucie County School Board Meeting Transcripts: September 22, 2015
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4

ST. LUCIE COUNTY SCHOOL BOARD MEETING

4204 Okeechobee Road

Fort Pierce, Florida 34950

September 22, 2015

5:00 p.m. - 6:43 p.m.

IN ATTENDANCE:

Dr. Donna Mills, Chairman

Kathryn Hensley, Vice Chairman

Carol A. Hilson, Board Member

Debbie Hawley, Board Member

Troy Ingersoll, Board Member

E. Wayne Gent, Superintendent

Molly Shaddock, Attorney

Chris Harrison, Recording Secretary

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P R O C E E D I N G S

1
2 DR. MILLS: Welcome this evening to the
3 St. Lucie County School Board Workshop Meeting,
4 September 22, 2015. We've now called the meeting into
5 order.

6 Would you please stand with us for the
7 Pledge of Allegiance, directly after, Our Kids at Hope
8 Treasure Hunter's pledge.

9 (Thereupon, the pledges were recited.)

10 DR. MILLS: I would like to remind our
11 audience if you desire to be an unscheduled speaker,
12 you need to turn your forms in right away. You can
13 find them in the back of the room. Please hand them
14 over to Miss Chris, which is on the far left of me,
15 and we will be happy to recognize you at the
16 appropriate time.

17 Our vision for St. Lucie County Public
18 Schools is that, in partnership with this community
19 and parents, we will become premier centers of
20 knowledge that are organized around students and the
21 work provided to them; our name will be synonymous
22 with the continuous improvement of student achievement
23 and the success of each individual child. Our promise
24 is to move from good to great focusing on our core
25 business, that business being the challenging,

1 engaging and satisfying work for every child every
2 day. This is St. Lucie County way.

3 The Board will now open and conduct our
4 public hearing to receive comments on the
5 consideration of Somerset Academy, Inc. application
6 for replication of a charter middle school in
7 St. Lucie County School District. And before we open
8 it to our audience for comment, we are going to ask
9 our superintendent to please open this up with -- at
10 this time, please.

11 SUPERINTENDENT GENT: Thank you, Dr. Mills.
12 Good evening everyone. And I see we have a large
13 contingent of folks tonight on this item. I want to
14 welcome you to the school board meeting and glad
15 you're here. Especially for the students that are out
16 there, you get a chance to see democracy in action at
17 the local level. So we're really glad you're here.

18 I want to make a couple of comments before
19 we open this up to the public just to clarify for the
20 public what the role of the School Board is and
21 Superintendent with our recommendation.

22 Number one, the board -- our School Board
23 are legal, constitutional officers and, as such, they
24 are obligated to follow State Statute and Board policy
25 when evaluating charter school applications.

1 There's been some comments out there
2 regarding that the School District may be anti choice.
3 Just the opposite, this School District and this Board
4 is very progressive with our choice policies. It's
5 some of the most innovative and progressive that
6 you'll find.

7 There's also been some comments that the
8 Board may be anti charter. And, again, that's false,
9 as well. This School Board has approved the
10 applications most recently of Renaissance Tradition,
11 Renaissance St. Lucie West, Palm Point K-8 and Imagine
12 Now in Port St. Lucie within the past few years.

13 In regard to tonight's application, this has
14 nothing to do with the high school, with the high
15 school itself. I know we have several students that
16 are here and some may speak. And the high school is a
17 successful high school, it meets a need. It's doing,
18 from what I understand, a very excellent job in
19 educating our students. This deals tonight only
20 solely on the merits of the application for the middle
21 school charter, Somerset Middle School application.

22 The District has offered -- has met with the
23 staff and as I had offered to extend the time of the
24 application to see if we could correct some of the
25 deficiencies and to find some common ground.

1 Unfortunately, the Somerset staff declined that offer
2 and decided that they'd come forward this evening, to
3 bring this forward this evening, as opposed to
4 delaying it for two weeks to a month to see if, again
5 like I had mentioned, we could find some areas that we
6 could agree on.

7 As I mentioned at the very beginning,
8 Florida Statute requires that all of the applications
9 need to be reviewed by the School District where the
10 charter school will be a located and to evaluate
11 whether the charter school application meets the
12 statutory requirements and criteria. To assist the
13 districts in this effort, the D.O.E, the Department of
14 Education, has a mandated evaluation form. I'm
15 explaining how this process works.

16 So the School District receives the
17 application, which they received from Somerset
18 Academy, Incorporated, to open a middle school, which
19 would be located on the same campus as the existing
20 Somerset College Prep High School. However, the
21 proposed middle school would be a separate stand-alone
22 school. Somerset Academy, Incorp. is proposing to
23 replicate an existing high performing Somerset Academy
24 middle school located in Broward County.

25 So based on a thorough review of the

1 application we have found several deficiencies in the
2 application itself, but some more significant than
3 others. Among the more significant ones are that the
4 application failed to show how the proposed school
5 would improve student learning and academic
6 achievement through use of innovative learning
7 methods, as required by law.

8 Secondly, there's no clear plan for serving
9 students with disabilities at the proposed school or
10 for serving students who have more than minimal
11 disabilities, as required by law.

12 Thirdly, there's no clear plan or commitment
13 for providing school bus transportation for all
14 eligible students as required by law.

15 Fourth, the proposed school is not
16 substantially similar to the school to be replicated,
17 as required by law.

18 Fifth, the staff at the school to be
19 replicated will not be significantly involved with the
20 proposed school, as required by law.

21 And then finally, the school's financial
22 management practices do not comply with the law,
23 because there's no clear plan for describing how the
24 Governing Board can effectively manage the school.
25 The Governing Board does not have an arm's-length

1 business relationship with the for-profit ESP and has
2 delegated much of the day-to-day operations to the
3 ESP. The proposed budget does not include funds to
4 pay for staffing, an operational plan outline in the
5 application, which means that many of the educational
6 and operational services provided -- or proposed
7 cannot be provided. And there's no viable backup plan
8 for facilities, if the construction of the new
9 facilities are not completed prior to the start of
10 school.

11 So based upon this information and a
12 thorough review -- As late as yesterday morning, we
13 spent 90 minutes with representatives from Somerset
14 Academy in an attempt to possibly try to reach some
15 resolution on this. Again, the offer was made to try
16 to extend this out for two weeks to a month to see if
17 we could do that. I really am left with no choice but
18 to make a recommendation to the Board this evening to
19 deny this application, based upon those reasons.

20 I wanted to state that publicly up front and
21 I also want to make it clear that this has no
22 reflection on the high school whatsoever. I know
23 students may want to come tonight and speak about how
24 well the high school is run and how much it means to
25 them and it's meeting a need. We know that and get

1 that, but that really, for tonight process, that's
2 absolutely not what the relevant issue is. The issue
3 tonight really is just the consideration of the
4 application for the middle school.

5 Thank you, Madame Chair.

6 DR. MILLS: You're welcome, Superintendent
7 Gent.

8 At this time, we have received over thirty
9 unscheduled speaker request forms. So I'm going to
10 ask the Board if you are okay with us reducing those
11 three minutes to two minutes tonight? I would like to
12 have Miss Erika keep the three minutes, but everyone
13 else two minutes; and also if you have someone that
14 can speak in behalf of a lot of these that are coming
15 forward as requests to be unscheduled speakers.

16 So if the Board is okay with that, we will
17 do two minutes instead of three minutes or is there
18 any type of discrepancy on that?

19 MR. INGERSOLL: I don't mind giving them
20 three minutes, because some of these students might
21 have had their speeches memorized or whatever. For
22 me, it doesn't rather, but I would rather go with
23 three minutes.

24 DR. MILLS: Okay. So three minutes. Are we
25 going with the three minutes or would we like to

1 reduce it this evening?

2 MS. HENSLEY: You can also, if you choose,
3 do like some other governments do and do like 60
4 minutes or whatever, if you prefer.

5 DR. MILLS: I think 60 minutes might be a
6 little shorter amount, but I thought two minutes would
7 be pretty good.

8 MR. INGERSOLL: It's your call.

9 DR. MILLS: It's my call. Then I'm going to
10 call two minutes per person. I'm going to ask our
11 attorney if you would please keep those minutes for
12 us.

13 At this time, we will begin with Nancy
14 Iannacone. Would you please come forward. I may mess
15 up a little on these last names, but as you come to
16 the podium -- Thank you for such a wonderful smile, as
17 you come to the podium -- if you would please, state
18 your name and your address before you start.

19 Okay, what we will do, because we do have so
20 many unscheduled forms, I'm going to call about three
21 people up at one time. If you would just stand behind
22 Nancy and come right up after she completes it.

23 Nancy, don't forget to give your name and
24 address. And next will be Cathy Townsend and Janie
25 Twomley. Please help me out with your name, as you

1 come up, and your address please.

2 Miss Nancy.

3 MS. IANNACONE: Thank you. Hi, my name is
4 Nancy Iannacone. I live at 2936 S.E. Santa Anita
5 Street, Port St. Lucie, Florida. My daughter has
6 transportation to and from school, which is about a
7 25-minute ride every day. Let me say thank you again
8 for having the opportunity to speak. I am a
9 registered voter and taxpayer in St. Lucie County.

10 We, as parents, know what's best for our
11 children, not the School District bureaucracy. I have
12 a right, as a parent, to decide what educational
13 environment is best for my child and that is why I
14 make the daily decision to send my child to Somerset
15 College Preparatory Academy, not only because it is an
16 A-rated school with a safe environment, but more
17 importantly because of its leadership and quality
18 teachers.

19 If you approve the middle school, I know the
20 leadership and the quality teachers will remain the
21 same. How do I know this? Well, because I know Miss
22 Rains, the Principal, and I know she will stand to her
23 word. In conclusion, I just want to say the taxpaying
24 and voting parents in this room tonight, and
25 especially for those who could not attend, deserve a

1 choice. If you deny this charter school application,
2 you're denying hundreds of families a choice
3 opportunity. Please do not deny our children, our
4 future the best educational choice. Thank you.

5 DR. MILLS: Thank you, Miss Nancy.

6 Miss Cathy, would you please come forward.

7 MS. TOWNSEND: Good evening, Cathy Townsend.
8 I'm going to be very brief. I would just like to say
9 that I know with the position that you all serve in,
10 that you know that qualify public schools is important
11 and it has a great economic impact on the community.
12 And I hear so often parents say they'd like more
13 educational choices; and a lot of them don't fit into
14 the public schools that we have and they are choosing
15 to send them to charter schools. I have several
16 friends that attend charter schools. And so I know
17 that we have dedicated staff and teachers in this
18 community and I know that we have great schools here,
19 but unfortunately there are also schools that are
20 failing.

21 So for that reason, I'm here tonight to
22 speak up to say that I support charter schools. I
23 feel that they are needed in the community. They have
24 a great economic impact on the community and I would
25 hope that you would vote yes, in favor of this, this

1 evening. Thank you.

2 DR. MILLS: Thank you, Miss Townsend.

3 Janie.

4 MS. TWOMLEY: Hello. My name is Janie
5 Twomley and I live at 3692 Southwest Sterricker Street
6 in Port St. Lucie. I'm a taxpayer and registered
7 voter here in St. Lucie County. I have a daughter
8 attending the Somerset College Preparatory Academy.
9 She's a junior this year. When I moved here from
10 Washington state, I was a little apprehensive about
11 some of the public schools here, but I was very
12 pleased and surprised to find out that I had a lot of
13 choices, private school, charter schools; and we chose
14 charter school.

15 I believe that the charter schools serve a
16 good purpose for this community. You have a sign
17 outside your double doors that says "Quality schools
18 are the responsibility of the entire community." That
19 is true. The more choices our children have, I think
20 the better that educational opportunities will be for
21 them. Somerset College Preparatory Academy, of course
22 as you know is, an A-rated school. And I believe that
23 if they were allowed to extend this to the middle
24 school, that they would also be an A-rated school,
25 because we have excellent teachers. The staff there

1 and the principal there are very committed to their
2 children and so -- I have grandchildren and great
3 grandchildren that live here in Port St. Lucie and I'd
4 like to see them have a choice about the middle school
5 that they attend; and that's why I'm here today asking
6 you to approve our conditions to add a middle school
7 to our already established A-rated high school. Thank
8 you.

9 DR. MILLS: Thank you, Miss Janie.

10 I will now call Kerri Johnson forward
11 please, Ralph Arza and Miss Diamond, in that order.
12 Please remember to give your name, full name and
13 address.

14 MR. ARZA: Thank you very much. Madame
15 Chair, Board members, my name is Ralph Arza. I'm a
16 former State representative here in the State of
17 Florida, head chair of the Education Committee and was
18 a part of who wrote a lot of the education laws, only
19 the good ones, and I also was a part of the charter
20 school legislation. And I represent the Florida
21 Charter School. It's a 501-C3 non profit that's
22 mission is to protect quality charter school, to
23 assist school boards when you need to close down
24 charter school not performing properly.

25 Now, one thing that took place at that

1 meeting yesterday, Mr. Gent mentioned was this is the
2 first time that the School Board or the School
3 District in St. Lucie County hears a replication
4 application. Why did the Legislature pass this law?
5 Because they felt not all charters are the same and if
6 you have a high performing charter school, both
7 academically and financially, then we want to
8 replicate those throughout the State of Florida. So
9 we wanted to create a format to make it easier, not
10 harder to be approved.

11 At the meeting that I went yesterday and I
12 participated, I felt that it was staff -- I'm not
13 going to question somebody's intentions, because that
14 would be wrong on my part, but I really thought that
15 it was looking for a way to say no; and that's what I
16 witnessed, you know, from the staff that I met with;
17 and I think that is wrong.

18 Now, you guys are Constitutional officers.
19 I was one. And no -- You can't be removed from
20 office. That's a very sacred situation in our state.
21 But when I swore to my oath of office, like you did,
22 is to defend all the laws, not the ones I like or the
23 ones I disagree with. And there's lots of people in
24 different counties who have said we're against charter
25 schools. That's great. You know, go to Tallahassee,

1 get elected to the Legislature, change the law. But
2 the law in the State of Florida is that charter
3 schools provides parents a choice and that choice is
4 not just a one-time choice, it's a daily choice,
5 because they want something different. Charter
6 schools only exist because parents like the ones you
7 hear tonight want them for their child; and I would
8 hope that you listen to what they're saying. Thank
9 you.

10 DR. MILLS: Thank you, Mr. Arza.

11 MS. JOHNSON: Good evening. My name is
12 Kerri Johnson and I reside at 2473 Southeast Fruit
13 Avenue in Port St. Lucie. I've been a resident of
14 Port St. Lucie and St. Lucie County for 15 years. I
15 have two children in the St. Lucie County District.
16 For the last 12 years, my oldest son has been on wait
17 list for Lincoln Park Academy. He's now a junior at
18 Somerset College Preparatory Academy and I'm so glad
19 that I found that school.

20 All through middle school, we kept hoping
21 and praying we'd get the call one day that he made it
22 into that school. When high school came around, we
23 were not pleased with our choices of where he could
24 attend. So we researched and we found Somerset
25 College Preparatory Academy.

1 The teaching staff, they are there no matter
2 what. They offer teaching sessions on the weekends,
3 if needed. They're a phone call or text away, if the
4 student has questions. The leadership, the Principal,
5 Erika Rains is always there knowing the children by
6 name, by knowing how they're doing. She's actively
7 involved.

8 If my child had the opportunity to start at
9 the middle school level to get the type of education
10 that he's receiving now, he'd be so much more prepared
11 for the future. And our children are the leaders of
12 tomorrow and if the leadership that Erika Rains
13 provides now can be a starting point for our children,
14 that's what we need. Thank you.

15 DR. MILLS: Thank you, Miss Johnson.

16 MR. RATUPPANANT: Greetings School Board of
17 St. Lucie County. My name is Diamond. I reside at
18 1056 Southwest Placetas Avenue. I'm an 11th grade
19 student aspiring to be a mayor, after I attend
20 college. In regard to that, my scholarly achievements
21 reflect my ambition. I cannot thank my school enough
22 for giving me the opportunity to pursue my goal
23 through my studies. Volunteering at political
24 fundraisers and even going as far as taking
25 like-minded students and myself to Miami to attend a

1 lecture hosted by the Leadership Institution, which
2 has taught me more about politics, than any public
3 high school class can ever teach me.

4 I'd like to clarify, I speak not of my
5 experience to promote the high school, but to give an
6 example of what this school could achieve for
7 middle-schoolers. Then knowing that middle school
8 gives another three years to have the experience that
9 I had, it fills me with eagerness to get this program
10 open, along with the new school building.

11 If given the option to choose the school I'd
12 like to attend, there's no -- not a chance I'd take
13 any other school than the one I'm attending now. The
14 teachers, the staff knows the potential that I have
15 and all the other students have. And everyone in here
16 is in for their potential. If not, then they have the
17 choice to leave. It is a choice school, after all.

18 And personally, my experience with the high
19 school has not only taught me math, science, history,
20 as a normal high school would, but it's also taught me
21 leadership and charisma. It's given me experience
22 with politicians and it's let me travel to
23 universities with the science alumni team that has on
24 its first time scored in the upper 50 percent of the
25 competition. I'd love to see the middle school that

1 we want to open achieve the same medals; and thank you
2 for the opportunity for letting me be up here.

3 DR. MILLS: Thank your, Mr. Diamond.

4 Gary Montagna, please come forward. Erika
5 Rains, Chloe James-Faulkner and Brittany -- Brianna
6 Zirger, please, if you would come forward.

7 Good evening, Miss Rains.

8 MS. RAINS: Good evening, Dr. Mills. Thank
9 you guys for having us here tonight. I appreciate the
10 opportunity to speak. I'm Erika Rains. I live in
11 Port St. Lucie.

12 I want to address a few of the items that
13 are on that summary sheet that you guys have and I
14 want to start with the transportation, because I know
15 that's a huge issue; and I just want to clarify we do
16 currently provide transportation. I do have a
17 two-year contract, which would take me into next year,
18 and that is something that -- And I will put it in
19 writing tonight. We absolutely intend to continue to
20 do that. We understand this is a choice district.
21 The way that we do transportation in this district, we
22 wouldn't have enrollment, if we didn't otherwise. So
23 I'm not sure how that became an issue, with exception
24 of maybe me saying that I wanted to survey the parents
25 first. So, for clarification purposes I do, I will

1 continue to; and I have no problem putting that in
2 writing. So the transportation piece, I just want to
3 put that to rest.

4 With regards to the financial part of it, we did
5 submit a letter, a ledger letter from Building Hope that
6 shows a line of credit. The budget that we put together
7 does not include the CSP grant, because obviously that's
8 not guaranteed. And we are part of the Somerset, Inc.
9 network, which does have its own stand-alone funding, as
10 well. So finances, I functioned our first year with 86
11 students at high school level and still had my required
12 2.5 percent surplus. And I'm sure you've seen the
13 financials from the last two years. We have done
14 incredibly well under the same leadership, with the same
15 back-up provider, with the same Somerset, Inc. The results
16 of our financial management piece would be the same for the
17 middle school, as well.

18 With regards to the ESE part of it, we currently
19 have an agreed upon, between the district and ourselves,
20 ESE plan in place. So we do service our students and the
21 middle school would be no different. It would be at a
22 minimum what we currently have and it would actually
23 probably be a little bit more than that, because as we go
24 to the --

25 MS. SHADDOCK: That's two minutes.

1 MS. RAINS: Right, but I believe I
2 understood Dr. Mills to say that I might have --

3 DR. MILLS: Extension for her good reason.

4 MS. RAINS: Thank you. I apologize, that
5 took me off track.

6 The ESE part, with the increase in students,
7 that those services would also increase, but at
8 minimal would be what the District has already
9 accepted at the high school level. We currently bring
10 in PT, OT, speech. I contract out for all the
11 services we're unable to provide in house and we would
12 continue to do that. Again, it would be at minimum
13 what we already have.

14 And I hear you saying that this has nothing
15 to do with the high school, but I'd like to point out
16 that the leadership at the proposed middle school is
17 the same. The company, Somerset, Inc., is the same.
18 The backhouse provider is the same. The teaching
19 staff is the same, I would add, too. And that staff
20 would only be the same quality that we currently have,
21 as I am the one doing the hiring. So while I
22 understand it doesn't have a lot to do with the high
23 school, it absolutely -- our high school experience,
24 our performance should show that we do have -- we have
25 what it takes to make that happen.

1 This isn't an experiment. It is tried and
2 true. Yes, I see, times up. Thank you.

3 DR. MILLS: Thank you, Miss Rains.

4 Gary Montagna, is he here?

5 MS. ZIRGER: Good evening, ladies and
6 gentlemen of the Board. My name is Brianna Zirger and
7 I'm a senior at Somerset College Prep and I'm worth so
8 much more than a dollar sign. I'm really sorry to
9 admit this, but I think you've forgotten what your job
10 is. I'm here to just remind you about that. You're
11 an elected official, which means that the community as
12 a whole is putting their trust for their children's
13 education in you, and you guys have let 'em down. You
14 can preach all day that you care about the children,
15 but your actions aren't showing that. Your actions
16 are saying that you don't believe that these students
17 should have access to a choice school, one that's
18 going to give them a college prep education. All your
19 actions are doing is seeing these children, the future
20 of our society, as nothing less than a few numbers and
21 some test scores. What Somerset can do with a child
22 is turn those few numbers and test scores into future
23 teachers, doctors, engineers, astronauts. The
24 possibilities are endless.

25 Now, if you do agree to side with -- if you

1 do side with your staff and agree to deny our high
2 performing application for a middle school, I only ask
3 you to do one thing: I want you to look at every
4 single person sitting in this audience right now and I
5 want you to tell them that you don't believe that
6 their student should be allowed to have a choice
7 education, a college prep education, something that's
8 not offered at any other school in this district,
9 because by denying this application, that's exactly
10 what you are doing.

11 MS. JAMES-FAULKNER: I'm Chloe
12 James-Faulkner. I am a junior at SCPA. I was home
13 schooled, so I was confused and distraught.
14 Everything was foreign to me when I first came here.
15 I thought I would have dropped out and go back to home
16 schooling because at first it was so difficult for me
17 to get used to everything. When Miss Rains and the
18 other teachers saw how badly I was doing, they all
19 helped me. I even had some of the upperclassman help
20 me out as much as they could. That's just the kind of
21 school Miss Rains runs. Our teachers are phenomenal
22 and know how to teach everyone, even if they have a
23 different way they would like to be taught. All the
24 teachers know -- all the teachers make sure the
25 students understand the lessons. Our teachers also

1 prefer if the student asks as many questions as they
2 need to understand the lessons more thoroughly.

3 In the years I have been here, I have grown
4 more mature, gained more sense of responsibility and
5 gained a wider range of respect towards other. I am
6 more confident about going to college; and I think I
7 can do better now that I've gotten the idea of what
8 it's like to stay in an organized and working on my
9 only responsibilities.

10 I think a middle school can help prepare
11 more students for high school and then on to college
12 and life after school, while making sure they got a
13 good sense of respect and responsibility. Being here
14 helped me understand more things that go on around me
15 without realizing it. Being here helped me figure out
16 what I would like to be after college and I made it a
17 goal to fulfill that idea. Adding a middle school to
18 our high school would give a wider range of kids the
19 opportunity to be successful and further their minds
20 to do greater and better things with their lives. I
21 thank you for listening to what I had to say and I
22 thank you for putting everything I had to say under
23 consideration.

24 DR. MILLS: Thank you, Miss Chloe.

25 Yes, sir. Mr. Gary, can you please go

1 forward.

2 MR. MONTAGNA: Hi, my name is Gary Montagna.
3 I reside at 1990 Southwest Day Street, Port St. Lucie.
4 I've been with Somerset College Prep since day one. I
5 see firsthand every day what this school -- what sets
6 this school's spirit apart from others. Don't get me
7 wrong, we're not putting down the regular public
8 schools in St. Lucie County. I have two daughters who
9 have gone through Treasure Coast High School and were
10 taught with good staff. However, that's a school
11 student population of more than 2700 students. We're
12 a small school and we plan on opening, with the
13 addition of the middle school, with approximately 700
14 students. We're a tougher school, but we offer much
15 better choices and a better academic future for the
16 students. Our teachers are second to none, as they go
17 out of their way to offer tutoring on their own time.

18 This is a school that is very different in
19 that I have personally gone to individuals' homes to
20 pick students up when they've had no other way to get
21 to school. Just yesterday I had a student leave keys
22 on the bus and, with further research this morning,
23 found out the student wasn't in school. When we
24 inquired as to where the student was at, he was
25 walking to school; and I set out to bring the student

1 to school. No other public school in St. Lucie County
2 is going to do that.

3 We ask you to please don't hold back the
4 growth of Somerset. Vote yes tonight to approve our
5 middle school addition. Send a clear message to our
6 youth that you, our elected Board, do care about our
7 students' choices, their future and their education.
8 Thank you.

9 DR. MILLS: Thank you, Mr. Montagna.

10 I'm going to call four more names up. Line
11 up as you hear your name. Michelle Leckenbusch.
12 Daniel Federici, Chris Toussaint and Yvette Cruz.
13 Please remember to give your name and your address,
14 please, as you come to the podium.

15 MS. LECKENBUSCH: Hello. My name is
16 Michelle Leckenbusch. My husband and I have six
17 children, as you can see. They are all 17, 11, 9, 6,
18 4 and 17 months. Our oldest daughter has been at
19 Somerset College Prep from before the school opened
20 its door. We helped to get the school ready by
21 painting, laying floors and much more. We did not do
22 that out of obligation, but out of choice.

23 From the first time I heard Erika Rains
24 speak about her vision of the high school, I knew that
25 that would be where I would choose to send all of our

1 children for high school. No offense to the other
2 traditional options in our county, but they are not
3 for everyone. I want my kids to be safe and well
4 cared for while receiving a great education. Miss
5 Rains and Miss Roach do just that.

6 My daughter, along with the other 324
7 current students, are not just a number. They care
8 for my daughter and her academic needs just like I do,
9 which is a tall order, by the way.

10 When you guys were speaking before, it kind
11 of made me question. So you support the Now Charter
12 School? I believe that's been an F-rated school for
13 the past few years. That's kind of disturbing.

14 Not all kids thrive in a school that has
15 over two thousand kids, like the other high schools in
16 our county. Somerset has proven themselves to be a
17 great choice for St. Lucie County parents and students
18 for test scores, great leadership of the
19 administration and a long list of accomplishments from
20 our current students.

21 I, kalong with most of the people in this
22 room, are registered voters in St. Lucie County and we
23 deserve the right to choose. I will be choosing to
24 send all of my beautiful children that are over there
25 to the new Somerset middle school after the Board

1 approves the vote tonight. Thank you for your time.

2 DR. MILLS: Thank you, Miss Leckenbusch.

3 MR. TOUSSAINT: Hi. My name's Chris
4 Toussaint and I reside at 4070 Southwest Balleto
5 Street, Port St. Lucie, Florida. I'm a sophomore
6 here, my second year, sophomore at Somerset College
7 Prep; and I was given the opportunity to come down to
8 this meeting to share my experience.

9 When it came time for me to select a high
10 school that I'd like to continue or further my
11 education in, I knew I had a very big decision to
12 make. I was actually extremely worried that I'd made
13 the wrong decision. I feared my outspoken personality
14 will definitely get me into a lot of trouble with
15 fellow scholars at Treasure Coast; and I feared I
16 would be met with old friends who consistently -- who
17 constantly promoted troublemaking, among other
18 behaviors I did not want to continue. I knew that if
19 I selected either one of these schools, I'd be put in
20 a position to conform to the
21 oh-black-boys-generally-are-not-the-best-student
22 stereotype, which is fair considering statistics
23 warrant such stereotype.

24 Somerset was a unique option, however. I
25 mean, I know I heard quite about it from friends and

1 different relatives. And after doing my own research,
2 I noticed Somerset took high pride in showcasing their
3 scholar achievements. At first, it was a bit daunting
4 applying to a school boasting high test scores and a
5 school that expects success from every single one of
6 their scholars; and I knew I'd be put in a very
7 challenging and demanding position, a position that I
8 don't generally succeed in. After reading more into
9 it, the goals they set forth clearly state that they
10 strive every single day to turn their students into
11 successful scholars; and the scores they boast prove
12 that. They're very successful.

13 I shot in the dark and applied. Little did
14 I know a few days later, I'd receive a letter saying I
15 was accepted. It was a massive relief.

16 My first year was definitely challenging,
17 but it's a challenge that I enjoyed concurring with my
18 peers and fellow scholars. Miss Rains cares about the
19 students here at Somerset and I know that she'll do
20 everything in her power to ensure the middle school
21 follows the same beliefs as the high school does. I
22 appreciate your time and thank you.

23 DR. MILLS: Thank you, Chris.

24 MS. CRUZ: Hello. My name is Yvette Cruz.
25 I reside at 2761 Southwest District Avenue. I'm a

1 property owner and a resident of St. Lucie County and
2 I am a stakeholder in this community. I am supportive
3 of building a Somerset charter middle school, because
4 as a mother of a student who successfully graduated
5 high school, went on to college and became a
6 successful business owner, I know it works.

7 My daughter thanks me all the time for being
8 the noisy parent that called the School Board, wrote
9 the letters and successfully moved her into a charter
10 school. She said that her peer students always spoke
11 about the college of their dreams. The teachers
12 supported her and helped her turn her weaknesses into
13 strengths. She was her -- math was a weakness of hers
14 and now she is a successful business owner. Because
15 my daughter went to a charter school, I know what
16 these schools are capable of doing and I want other
17 parents to know. It works. Thank you.

18 DR. MILLS: Thank you, Miss Cruz.

19 Now, there are people that are continuing to
20 bring up the unscheduled speaker request forms, but we
21 stop at a certain time and we do have enough speakers
22 here already, but thank you.

23 Yes, sir.

24 MR. FEDERICI: Good evening. My name's
25 Daniel Federici, 473 Copley Terrace. I'd like to

1 point out I think, as adults, we think a year may not
2 be a long time, but I think a year can make a huge
3 difference in a person's life. As a student myself,
4 I've been a student, a teacher or administrator all my
5 life. But as a middle school student, I was at a
6 district that had advanced classes. When I moved to
7 another district that didn't have advanced classes, I
8 was withheld from graduating early and made to take
9 one English class my senior year. This kind of
10 policies, when you're going from middle school to a
11 high school, if the policies aren't the same
12 consistent across the board, these kind of things can
13 happen.

14 I'd also point out that the articulation
15 that can take place between middle school and the high
16 school in the same building is going to benefit a
17 student greatly; and I'll leave it at that. Thank
18 you.

19 DR. MILLS: Thank you.

20 I'll now call up Chuck Knodek, Kariann
21 Passaro, Madison White. I believe this one name is
22 Bill Patterson maybe. Bill.

23 Okay, yes, sir.

24 MR. KNODEK: My name is Chuck Knodek and I
25 currently reside at 248 Southwest Manatee Springs

1 Boulevard in Port St. Lucie. I'm here to address one
2 of the concerns that I believe the Superintendent
3 stated earlier in regards to accommodations of a child
4 with special needs. I would like to speak from
5 experience. I don't have an agenda. I don't have a
6 prepared speech.

7 I just want to let you all know that we
8 recently moved here from Minneapolis, Minnesota and
9 the transition from that school to this school has
10 been amazing. Whether -- We are currently actually in
11 the process of working on a 504 plan with the school.
12 Whether it be talking to Miss Rains or picking -- a
13 phone call, she's the first one to call me back or
14 whether I want to stop to the office and talk to her,
15 she has been very helpful. I can tell you that in
16 Minneapolis, it was nothing like this. And so we are
17 moving forward and I just wanted to bring that to your
18 attention that, this process itself, and she's been
19 very accommodating. And I would strongly disagree
20 with your opinions on addressing the special needs;
21 and I just say I would hope you vote yes.

22 DR. MILLS: Thank you, Mr. Knodek.

23 MS. PASSARO: Good afternoon. My name
24 Kariann Passaro and I am a senior at Somerset College
25 Prep. Through these past few years of high school, I

1 have been given the chance to learn and achieve things
2 that I never expected. Deciding whether or not to
3 attend a charter high school was a decision that I
4 wasn't quite sure how make to at first, because I've
5 grown up in public schools. However, choosing to
6 attend a school such as SCPA was one of the best
7 decisions that my parents and I could have made.

8 What charter schools, and our school in
9 particular, have is like no other. The chance to go
10 outside of the standard curriculum and have a
11 different approach at learning makes learning more
12 interesting in understanding the material that is
13 being taught. The teachers and staff and Miss Rains
14 are very supportive of all the students by encouraging
15 them to do better and better each day and go above and
16 beyond the goals that we set for ourselves.

17 Giving students the opportunity to attend a
18 school as qualified and unique as ours starting at a
19 middle school level will only give them a head start
20 in life and push them in the right direction.

21 Approving the SCPA middle school application will not
22 only help students who want to grow and achieve, and
23 families all around St. Lucie County, but it will
24 benefit the community as a whole. Thank you.

25 DR. MILLS: Thank you, Miss Kariann.

1 MS. WHITE: Hello. My name is Madison
2 White. I reside at 611 Southeast Norsman Drive, Port
3 St. Lucie, Florida. I am a 12th grader at SCPA and
4 I've been there since the opening year of the school.
5 I first would like to thank you all for being here to
6 listen to what we have to say. I wasn't planning on
7 speaking until about an hour, so please excuse me.

8 I'm not thinking my one speech is going to
9 change the minds of those who believe that we should
10 not have a middle school, but I would like to be
11 heard. I'm very passionate about this subject,
12 because I have little brothers and sisters that I
13 would like to have the same opportunity as I, and as
14 of now they cannot.

15 Miss Rains does so much for all the students
16 here at SCPA, ensuring us a proper education; and this
17 is why so many parents try and put their kids in our
18 school. Full honestly, I have volunteered at multiple
19 places where I've had parents tell me they wish we
20 opened a middle school.

21 SCPA is making history with our current
22 high-schoolers and we would like to invite our
23 middle-schoolers on this journey. We are worried
24 about the future for our scholars. We would like you
25 to have goals, be successful, be whatever they set out

1 to be the best that they can, set high standards and
2 overachieve. Am I right?

3 I just don't understand if we all have the
4 common goal, why are we still denied the middle school
5 and why are we depriving our middle-schoolers? Thank
6 you.

7 DR. MILLS: Thank you, Miss Madison.

8 Is there a Bill Patterson here? Okay,
9 Mr. Patterson. Also Emma Van Camp please come up.
10 Claudean Cone and April Van Camp please come up.

11 MR. PATTERSON: Thank you for your time and
12 your service. My name is Bill Patterson. I'm a
13 resident of Port St. Lucie. I'm a taxpayer in Port
14 St. Lucie and I'm also the Chairman of the Republican
15 Party for St. Lucie County.

16 I've been following the charter school for
17 the last four years very closely. I've looked at the
18 list of the alleged inefficiencies or insufficiencies
19 in their application and each one of them was
20 addressed to my satisfaction. And I would like to
21 know from you which ones of those you did not find
22 satisfaction with? Because with respect to
23 transportation, it was taken care of. With respect to
24 handicapped, it was taken care of. Everything seems
25 to have taken care of, but yet, we're still back at

1 this point.

2 We all know, in this room, that this school
3 is going to eventually open. Are we going to spend
4 taxpayers' dollars wastefully to litigate it? Why
5 can't we do the right thing tonight?

6 We have a proof positive of a school that
7 has existed and you're looking for proof that the
8 future will exist. Well, nobody can really do that,
9 but what we can do is look at the example that's been
10 set. Look at Mrs. Rains and her school as a tree in
11 the community that has grown and grown. You can see
12 by the people, the parents that are all here tonight
13 that this has been a great success for our community.

14 What I would suggest is to look at it that
15 that is the tree and we're saying that the apples are
16 not going to fall from from this tree. This school
17 will succeed and we'd like you to do the right thing
18 tonight and not delay any longer. Thank you.

19 DR. MILLS: Yes, ma'am.

20 MS. VAN CAMP: Hello, my name is Emma Van
21 Camp and I spoke to you last year about the ESE
22 accommodations SCPA has made for me.

23 As a student with neurologically diagnosed
24 chronic migraines, school is difficult for me and the
25 stress high school brings can make my illness worse.

1 However, Miss Guindon and the administrators, faculty
2 have not made my years tolerable -- have made my years
3 tolerable and have made me successful. I am certain I
4 am successful at SCPA and I would struggle elsewhere.
5 In fact, one board member e-mailed my mom and said I
6 would be -- I should be home schooled. Apparently,
7 she believes no other school could support me either.

8 Please give SCPA a chance to help sixth
9 through eighth graders achieve success. There is no
10 evidence, based on SCPA's success rates, that
11 indicates a middle school will do anything but
12 contribute to the community.

13 DR. MILLS: Thank you, Emma.

14 Ma'am.

15 MS. CONE: Good evening. My name is
16 Claudean Cone and I'm a voting member of St. Lucie
17 County. My address is 1629 B Laurel Leaf Lane, Fort
18 Pierce, Florida 34950.

19 I'm here tonight to ask the Board to approve
20 Somerset College Prep Academy of the Treasure Coast's
21 request for a middle school. I am a grandmother and a
22 great grandmother of 13 grandchildren; and their
23 education is very important to me. Soon my youngest
24 grandchildren will need to make choices concerning the
25 middle school education and I would like for them to

1 have the same quality education that my Emma Rose has
2 received from SCPATC. Thank you kindly for your
3 consideration.

4 DR. MILLS: Thank you, Miss Cone.

5 MS. VAN CAMP: Good evening. My name is
6 April Van Camp. I reside at 1629 B Laurel Leaf Lane,
7 Fort Pierce, Florida. I'm here tonight to ask
8 St. Lucie County School Board members to approve the
9 request by the Somerset College Prep Academy for
10 expanding its charter to include middle school
11 students. I'm told and have heard tonight that
12 someone has questioned the school's ability to provide
13 for special needs students. Well, that was my
14 daughter two people ahead and my mother just ahead of
15 me. I can tell you, from my own experience with the
16 Somerset Prep Academy, I know that the school can meet
17 the challenges, as it has met -- the future
18 challenges, as it has met the challenges of past.

19 Furthermore -- and this kind of goes to what
20 Mr. Patterson said -- there's no reason to believe
21 that the school will be any less successful with an
22 expanded program. Fears can stop Board members from
23 acting to grant the school's request, but are such
24 fears justified? Fears can immobilize us. Fears can
25 freeze us in the status quo. These fears are only

1 justified if facts and evidence, based on relevant
2 past performance, show us that a real basis exists for
3 these fears to tip the balance. Otherwise, the
4 Somerset College Prep Academy should be allowed to
5 demonstrate that these fears are unfounded by
6 receiving your permission to expand the program.

7 If the school's program expands, any parents
8 of students who feel they are underserved can easily
9 leave the school. A young man said that earlier.
10 They're free to opt in or opt out. Additionally, the
11 school itself or St. Lucie County Board can make
12 modifications to help improve, become involved and
13 help the school in any future shortcoming. Nobody
14 would need to suffer from tonight's decision to give
15 the school a chance.

16 But, on the other hand, if the school's
17 request is denied because of fear of what could
18 happen, there is real and certain adverse
19 consequences. This successful school will be denied
20 the chance to prove itself once again and all the
21 parents and children who would be served by it will
22 never have that opportunity. There is little risk in
23 giving the school permission. The fears are remote
24 enough and the consequences manageable. On the other
25 hand, the adverse consequences of denying the request

1 are real and certain and undeniable.

2 I ask you to make the less risky choice and
3 approve the school's request. Thank you.

4 DR. MILLS: Thank you, Miss Van Camp.

5 Kim Sheler, please come forward.

6 Representative Debbie Mayfield. Michelle -- I can't
7 really see all the letters of your last name, but it's
8 S-C --

9 MS. SCHNORR: Schnorr.

10 DR. MILLS: Yes, please come forward. Thank
11 you. And Miss Sandy, please come forward.

12 MS. SHELER: Hi. My name is Kimberly
13 Sheler. I have a son currently at Somerset College
14 Preparatory Academy and he is an ESE student. He has
15 Asperger's and it is very much a challenge to work
16 with him every year to get him to where he needs to
17 be; and they've done an awesome job with him.

18 I also want to say that I believe that we
19 deserve a choice. That is the reason that I am here
20 with him. My daughter is also a middle school child
21 and I didn't have a choice to put her here and I would
22 have done so. So I really believe that every parent
23 deserves a choice. Thank you.

24 MS. SCHNORR: My name is Michelle Schnorr.
25 I'm a registered voter in the county. My address is

1 1740 Southeast Clearmont Street.

2 I really have to agree with Mr. Patterson
3 about this being a tree and it growing and growing. I
4 would, if I may, just take a moment and ask that all
5 the branches of the tree, would everyone from Somerset
6 just let us know that you are here to support this
7 school application by standing, please. Wow. So
8 thank you very much. You may have a seat.

9 This is only a fraction of the people who
10 support this school. Five o'clock is a tough time for
11 some people to leave work; and I just wanted to point
12 that this is a very strong group, but it's only a
13 fraction of the folks here and the rest of the county,
14 for that matter.

15 Thank you for this opportunity to speak
16 today. We desperately need middle school choice.
17 Regarding ESE, my high-schooler is thriving at
18 Somerset and if not for Somerset, we would had have to
19 have moved. That's not about ESE, but the next part
20 is.

21 My younger two kids have what I would call
22 unique learning needs. They are amazing students.
23 However, technically with Asperger's, they have a
24 disability. I've looked for and tried many school
25 options. Nothing fit their needs; and my husband and

1 I were faced with no choice, I now have to home school
2 them. They are both middle-schoolers.

3 It has been a hardship for my family. I
4 need choice and so does St. Lucie County. As a
5 parent, as an ESE teacher myself in this district for
6 three years, and as an educator in the corporate
7 sector for 25 years, I know this principal, this staff
8 and these teachers are what my kids and all of
9 St. Lucie would benefit from immeasurably. The County
10 would shine.

11 I'm just asking that you do whatever it
12 takes, think out of the box, work with Ms. Rains. I
13 encourage this Board to fulfill their commitment to
14 the mission that you stated up there at the beginning
15 of the meeting: The success -- continuous improvement
16 and success of each individual child. This is a huge
17 improvement. Thank you.

18 DR. MILLS: Thank you, Miss Michelle.

19 REPRESENTATIVE MAYFIELD: Thank you,
20 members. My name is Debbie Mayfield and I live at
21 1820 Ocean Way in Vero Beach, Florida, but I am
22 actually a House member. I was elected in 2008. I
23 represent part of St. Lucie County and Indian River
24 County. I am somewhat familiar with your county more
25 so than that, because -- and your situation.

1 My husband served on the School Board in
2 Indian River County for four years. He worked for
3 your School District as the Assistant Superintendent
4 of Facilities with Mrs. Hensley as a board member; and
5 then he served -- he had the honor of serving with our
6 representative, Ralph Arza, who is also here. So, you
7 know, we do have a little bit of a background in how
8 charter schools came about.

9 I will share with you, I was with Brevard
10 County School District delegation this morning. And
11 as much as they have a love for their children, and
12 they're our children, I had to keep reminding them
13 they are not just your children, they are our
14 children. They have parents that love them. They
15 have parents that are engaged in the education of
16 their children. And the School Board's responsibility
17 is to listen to what those parents have to say about
18 choice when it comes to education of their children.

19 Now, I did serve at the time that we passed
20 legislation to duplicate high performing charter
21 schools. And isn't that what we want to do? We have
22 a proven track record here of a school that is a high
23 performing school. They are an A-rated school. I
24 think there are two -- only two A-rated schools in
25 your county and they are one of them. So I would hope

1 that you would sincerely take into consideration what
2 the parents' needs are, what the children's needs are
3 and not delay the approval of this charter school.

4 Now, I was listening to some of the students
5 that came up to speak and I can tell you right now,
6 they have some great students; and that is a testament
7 that they are doing what is right at their school.

8 And we want them to duplicate what they are doing at
9 that school for our children. So I would just ask
10 that you not delay it -- every year does make a
11 difference -- and approve this tonight, so that we can
12 go about the business of giving parents a choice of
13 where their children go to school at. Thank you.

14 DR. MILLS: Thank you, Representative
15 Mayfield.

16 MS. KRISCHKE: Hi. Good morning,
17 Superintendent, Board members. Sandy Krischke here.
18 I reside at 8407 Fort Walton Avenue in Fort Pierce.
19 I'm the mother of three students who are currently
20 going through or have gone through St. Lucie County
21 Public Schools. For the past 17 years, I have served
22 or chaired five SAC committees, three PTO's, two
23 curriculum committees, one parent advisory committee
24 and founded and served on parent booster club. I
25 serve on the Indian River State College Board of

1 Trustees currently. I hold a bachelor's degree in
2 public policy and I'm just three credits shy for my
3 master's in public administration. With that being
4 said, I understand public policy, I understand
5 education policy and I understand this process in
6 which you have to go through to make these sorts of
7 things happen.

8 With that being said, while I haven't been
9 as involved in the charter high school as I would like
10 to have been over the past four years, what I have
11 been involved with is my own children's education. My
12 son happens to attend the only other A-rated school
13 we've all been talking about today: Lincoln Park
14 Academy. But I want it to be known that I would be
15 one of the first to pull my child out of Lincoln Park
16 Academy and join the mass exodus that's going
17 elsewhere in this county and join them right up for
18 Somerset. I have a fourth grade -- a student going
19 into fourth grade and I would just be on pins and
20 needles waiting until she could go to that middle
21 school, as well.

22 The reason for that is not because I know
23 that they've proven successes, but what they've proven
24 is that they have learning gains. If you look at the
25 test scores that are out there and publicized, they

1 are number one in every learning gains, second
2 overall, but the learning gains they're number one.
3 That tells me they're doing something right. And I
4 always look at the A and the B, but the learning gains
5 is what's important; and they're doing that here in
6 St. Lucie County and they're the only one doing it and
7 they're doing it the best. So my children will be the
8 first ones that I would sign up for that school.

9 And I highly recommend and respectfully
10 request that you guys please approve this charter, so
11 we don't end up in the same boat we were in four years
12 ago. Thank you for your time.

13 DR. MILLS: I will now call up Roland
14 O'Brien, Dodi Spence, Renea Gregory and another Cody.
15 I can't see the letters. Gregory maybe. Come on up,
16 Cody.

17 MR. O'BRIEN: Good evening, Madame Chair,
18 Board members, Superintendent and staff. My name's
19 Roland O'Brian. I live at 21 Villa del Norte, Fort
20 Pierce. I have no children and grandchildren in the
21 St. Lucie County education system.

22 When this topic kind of got hot here
23 recently, I got on Google with my notebook, as a lot
24 of people do. The first thing I found, that the State
25 of Florida, only 28 out of 52 in the education field.

1 I looked at the county. St. Lucie County is only 42
2 out of 66. Multiply those numbers together, 18.8
3 percent, meaning seventy -- or I'm sorry -- 81.2
4 percent of the education systems in the state -- in
5 the country are, quote, better than St. Lucie County,
6 just using the numbers and statistics.

7 So I went back and looked at six elementary
8 schools. From 2012 to 2013 only one was the same, all
9 the others went downhill, worse. From 2013 to 2014
10 one was better, one the same, four worse. Well, not
11 good. Looked at the high schools as well and, of
12 course, we've already talked about the Somerset being
13 an A-rated high school.

14 Best predictor of future is the past.
15 You've got it right in front of you.

16 My wife and I have a small business. We're
17 bringing people into the State of Florida. One of the
18 first things they look at is the educational system.
19 And I'm sorry, 18.1 percent does not cut it. Please
20 bring in another A-rated school, which is certain to
21 happen, by your vote this evening. Thank you.

22 DR. MILLS: Thank you, Mr. O'Brien.

23 MS. SPENCE: My name is Dodi Spence, 833
24 Southeast Streamlet Avenue, Port St. Lucie, Florida.

25 When I encounter individuals seeking to

1 relocate to St. Lucie County, the first question I ask
2 them is if they have children; and if they tell me
3 yes, I tell them look at Martin County or Indian River
4 County, because the school district here is absolutely
5 horrid.

6 Does the school board -- St. Lucie County
7 School Board want children to succeed? If so, the
8 St. Lucie County School Board should recognize what
9 Somerset has done. They're an A-rated school.
10 Approve the application for the middle school.

11 I have three children. Two that have
12 graduated -- two that have -- one child graduated from
13 Port St. Lucie High School. One child dropped out
14 after many years and it wasn't until the middle school
15 that I had to fight to get him tested to find out that
16 he had a learning disability. It shouldn't take that.
17 It shouldn't take that as a parent to fight to get him
18 tested.

19 Now I have my daughter. Last year she
20 encountered bullying from not only children, teachers.
21 Another teacher tell me hey, this teacher is picking
22 on your child all day long. Are you kidding me?

23 This is St. Lucie County District. I
24 couldn't take it. I was going to pay for her to go to
25 private school, but I stumbled across what I call

1 St. Lucie County's hidden treasure: Somerset Academy.
2 She's on the B honor roll right now, as far as her
3 grades as of Saturday.

4 The children, they -- Take a walk through
5 the campus. I go and I volunteer at lunchtime. The
6 kids all, they're happy. There's none of the BS that
7 you see in the high schools. The high schools, there
8 was always a fight every other day. You don't see
9 that in Miss Rains' school. Miss Rains doesn't put up
10 with bullying, but for the rest of the School
11 District, I cannot say the same.

12 I can tell you, Mr. Gent, you were at
13 Central when I was there. You're part of the reason I
14 left and I dropped out. I did go back to school and
15 received my Bachelor's in Healthcare Admission, but
16 the way the District runs is absolutely absurd.

17 MR. GREGORY: Can I go? My name is Cody
18 James Gregory. I live at 581 Southwest Feldman
19 Avenue, Port St. Lucie. I'll be honest with you,
20 Somerset's been wonderful for me. Here I'm treated as
21 a real person, not just a number on a spreadsheet.
22 All teachers are accessible and willing to go out of
23 their way to help you succeed. I mean, I can't tell
24 you how many of these teachers I have asked, as well
25 as office staff, for things to help me get into

1 college, whether it's transcripts or letters of
2 recommendation. And due to Somerset's close proximity
3 to the college and their dual-enrollment program, I am
4 on track to graduating this spring from IRSC with my
5 Associate's degree on an engineering track. Right now
6 I have 37 credits of the 60. I've consistently made
7 Dean's list and this was not easy. I'm taking hard
8 courses. You know, right now I've got Calc I with
9 Analytic Geometry, hard stuff. You know, I wouldn't
10 have made it this far, if I didn't have the guidance
11 and superior level of instruction from Somerset that
12 provided a good solid base for me.

13 By the end of my junior year, they had
14 assisted me, like I said, with applying to not only
15 colleges, but also applying to the NROTC scholarship.
16 The colleges I've applied to are Georgia Tech,
17 Embry-Riddle, Penn State, Norwich and Texas A&M, you
18 know. And this is not -- they've really helped me out
19 a lot and this is not the case with most other high
20 schools. I came from LPA and, I'll be honest, I went
21 there freshman year and I know I wouldn't have gotten
22 this help from them, I definitely wouldn't have. But
23 that's my story.

24 The reason why I'm here is for my sister,
25 who right now is in third grade. And my parents have

1 the right to choose where my sister goes. And me, I
2 had to wait until high school to get a education of
3 this level, and I think -- You know, I'm a good
4 student, but I think I'd be even a better student if I
5 got superior level of education starting in middle
6 school. And I think it's just -- it's not right that
7 the County isn't taking advantage of what Somerset has
8 to offer. Thank you.

9 DR. MILLS: Thank you, Cody.

10 MRS. GREGORY: Good evening. My name is
11 Renea Gregory and I live at 581 Southwest Feldman
12 Avenue, Port St. Lucie, Florida. That was my son.

13 I've been a homeowner and taxpayer in
14 St. Lucie County for 12 years. I'm also a registered
15 voter and a veteran. I pretty much -- I'm pretty
16 upset that my hard-earned taxpayer dollars are being
17 wasted in this way, because what's going to happen is
18 there's going to be an appeal and they're going to
19 win. Isn't that what happened before?

20 My husband and I not only have Cody, we have
21 an eight-year-old. She's in third grade. That is why
22 I'm here. We, as parents, are responsible for guiding
23 our children; and we, as parents, know what is best
24 for our children. No two children are the same and
25 what works for one may not work for the other. Square

1 peg, round hole. I'm sure you've heard that before.

2 More educational options are necessary to
3 ensure fewer children fall through the cracks. I hear
4 you guys talk about ESE and that was a concern, but I
5 didn't hear anyone mention anything about the other
6 end of ESE. It's not just the handicapped portion.
7 How about the gifted portion? Clearly they've been
8 able to hold up to that part.

9 My son came in gifted with an IEP and
10 everything and there hasn't been a problem. Look at
11 him, he's been very successful; and I'm sure he's not
12 the only one. This is why we need the choice of where
13 to send our children. The School Board should not
14 stand in the way of our choice and that is exactly
15 what I've seen being done. Thank you very much.

16 DR. MILLS: Thank you, Miss Gregory.

17 I'm now going to call Kia up to the podium,
18 Kelly up to the podium and Attorney Villafranco up to
19 the podium please.

20 MS. BOURSQUOT: Good evening. My name is
21 Kia Boursiquot and I reside at 1702 Southwest Day
22 Street in Port St. Lucie, Florida. I am a teacher
23 here in this county and I have a niece that I am a
24 guardian of and she was in St. Lucie County Public
25 Schools. When she decided to go to high school, we

1 had to figure out what high school we wanted her to
2 attend to and we decided for her to go to the College
3 Preparatory High School. She was in band at public
4 schools of St. Lucie County and this school did not
5 have band; and I understand that this school is a
6 academically pushed, run school and they don't have
7 different type of curricular activities for after
8 school. But I know and I researched and I know that
9 the Florida Legislature law state that any charter
10 school student can attend a curricular-base activity
11 in a public school.

12 So it took us during the summer, the whole
13 summer to get her into band at a public school high
14 school in the county. And I e-mailed the principal at
15 this public school, I e-mailed District personnel and
16 it was always a no, she can't do band, no. I e-mailed
17 them, I said, I don't understand, here's the Florida
18 legislation law that states that a student can
19 participate.

20 I would like to thank Miss Rains, Erika
21 Rains because she supported me, she assisted me in
22 everything that I needed. And it took my husband to
23 call the District office and talk to Dr. Wile
24 (phonetic) and Jonathan -- another guy by the name of
25 Jonathan, just to let them know that the Florida

1 Legislature law says that she can attend a charter
2 school, as well as participate in a public school
3 after-school activity. And I would just want to ask
4 you to consider having them have a middle school,
5 because you talked about innovative strategies and, as
6 a teacher, they're clearly showing strategies if they
7 are an A-rated school. Thank you for your time.

8 DR. MILLS: Thank you, Miss Kia.

9 MR. VILLAFRANCO: Good evening. My name is
10 Leonard Villafranco. I'm an attorney in this town,
11 been here since 2004. I had a whole speech prepared,
12 but what impressed me most tonight are these students.
13 You've heard testimony from a lot of people tonight.

14 Stand up. Stand up. All the students, I
15 want you to stand up. Again, sorry, but I need you to
16 stand.

17 Their testimony tonight was more impressive
18 than civic leaders, elected politicians, business
19 people and local attorneys. They came up here and
20 impressed the hell out of me. Why? Because Somerset
21 works.

22 And you have two choices here tonight:
23 You're either going to tell these students that
24 regardless of what a good job you're doing, Somerset
25 does not need to expand. Or you're going to them that

1 you support them, you support Miss Rains.

2 This program works. It's an excellent
3 program. My 15-year-old stepdaughter goes to it. She
4 comes home and tells us how much fun she's having, how
5 much she's learning. My two children, graduates of
6 Centennial, they both came to me and said, dad, I wish
7 we had this opportunity.

8 You must, must give every student in Port
9 St. Lucie or in St. Lucie County the opportunity to
10 attend middle school and high school with this program
11 and years from now elementary school with this
12 program. It's an excellent, excellent program.

13 And I have vowed my assistance and the
14 assistance of my law firm to help Miss Rains in any
15 way possible. This is going to happen and you're
16 either going to spend our taxpayer money fighting it
17 or you're going to tell these students good job, let's
18 expand. Thank you.

19 DR. MILLS: Thank you, Attorney Villafranco.

20 MR. GREGORY: That's a hard one to follow.

21 DR. MILLS: Yes, it is.

22 MR. GREGORY: My name's Kelly Gregory. I
23 live at 581 Southwest Feldman Avenue, Port St. Lucie.
24 I'm a resident, taxpayer and I'm a veteran.

25 I want to talk about what happens when

1 parents are a denied a choice. As a kid growing up, I
2 was denied choices. Probably gifted like my son, but
3 never had the testing or anything like that until I
4 went into the military. And guess what, I found my
5 niche and I excelled, principal's list, dean's list,
6 all that after schooling and getting the discipline I
7 needed.

8 Mrs. Rains has brought a unique gift to this
9 county and this School Board. These students learn.
10 I've seen the teachers take the time to educate them.
11 They do it on their lunch, they do it after their
12 break. I mean, these kids do great.

13 And if you want to know, that's, like you
14 said, the floor plan for a middle school. This is
15 what's going to get the middle school going. I don't
16 think Miss Rains knows how to fail. I think she might
17 stop for a minute, take a breath and keep going at it.
18 I understand that, because I've in that situation
19 where somebody says you're not going to make it, like
20 hell. I always make it. And I think Miss Rains is
21 cut from the same cloth.

22 This school is great. The middle school
23 will benefit my eight-year-old daughter. She needs
24 it. If you guys want to take a look, look at what
25 you've got going on in your other schools. Learn from

1 Miss Rains, maybe you can apply it. Okay, that's all
2 I got to say.

3 DR. MILLS: Mary Beth, Mary Ann Russel, Mark
4 Gotz and Ned Schuster; and we'll end with this group
5 here.

6 MS. LIPROT: Hi, good evening. My name is
7 Mary Beth Liptrot and I reside at 2091 Southwest Vila
8 Nova Road, Port St. Lucie. I had no idea I was going
9 to speak tonight, but when I realized what was at
10 stake here, I really felt required to do so. I am a
11 retired teacher of 35 years from Broward County,
12 Florida where I taught special needs and regular
13 education.

14 When I first moved here about five years
15 ago -- I have granddaughters, twins, that are freshman
16 at Somerset. And when I first moved here, I brought
17 them to the library over at Indian River State College
18 and they said wow, this is a real college campus.
19 When I heard that there was a high school -- this is
20 when they were in sixth grade -- that was on the
21 campus, we came to the first open house to see if that
22 was going to be a reality. And when those girls went
23 to tour, when they were accepted and went to tour
24 Somerset, and they themselves and their mom told me
25 how impressed they were that Miss Rains spent over an

1 hour touring the school with them.

2 They were in Ohio this summer at other
3 grandparents and she kept writing to me, the one
4 little one, Olivia -- well, not so little anymore, but
5 they are my grandkids, so I can say it. And she wrote
6 to me and said, are you sure I'm getting in, am I
7 going to go to Somerset? When I picked those girls up
8 that day from the high school, it's the first time
9 that I have heard them say we loved it.

10 They've been offered every opportunity to
11 shine. They've been given tutoring. They went into
12 the clubs that they enjoyed. And I have two younger
13 grandchildren, aged one and two, and I hope that they
14 have the opportunity to go to middle school, to attend
15 Somerset. And I want to thank everyone here for
16 listening this evening.

17 DR. MILLS: Thank you, Miss Mary Beth.

18 MS. RUSSEL: Good evening. My name is Mary
19 Ann Russel. I reside on Sanctuary Drive in St. Lucie
20 West, Port St. Lucie. I'm a voter and I'm a taxpayer.
21 I don't have any children or grandchildren in school.

22 I have been over to Somerset Academy to tour
23 the Academy, to meet with the students, to meet with
24 the teachers and to see how that operation takes
25 place. When I got the call that the School Board was

1 going to deny the expansion of the middle school, my
2 first question was why? Why would we want to deny the
3 expansion of something that is working so well in this
4 county, that is educating our children so
5 phenomenally. You see from the children, the students
6 here tonight that got up to speak, they're articulate,
7 they're educated, they're confident. Why would our
8 School Board, that is supposed to be here working for
9 the children and the parents of this County, want to
10 deny them the expansion of such a great school? It
11 just doesn't compute to me.

12 I don't know if any of you have ever visited
13 the school. Have you spoken with Miss Rains on a --
14 not on a level in this manner? Have you met the
15 students? Have you been -- I was a judge at one of
16 their competitions. These students are brilliant.
17 The things that they come up with, the initiative that
18 they have, the imagination that they have, the want
19 that they have to do what they were doing was
20 incredible. And I just cannot figure out why you
21 would want to deny the rest of the students and their
22 parents the choice of that type of an education.
23 Thank you.

24 MR. GOTZ: Chairwoman Mills and Council --
25 or I should say School Board, Mark Gotz, Magnolia

1 Lakes, St. Lucie West.

2 Let's review the education system of
3 St. Lucie County. We're a district that has always
4 been in the bottom third of the State school
5 districts. You would think that a district of this
6 great a need would embrace an education program that
7 has proven to be one of if not the best in St. Lucie
8 County. The history of the College Preparatory
9 Academy of the Treasure Coast, now known as Somerset
10 High, goes back over six years when the high school
11 initially applied for a charter. The District
12 delayed, deceived and then denied the application. It
13 took two years and a final approval from the State
14 Board of Education to make the high school become a
15 reality.

16 What was the School District afraid of then?
17 What are you afraid of now, that a better education
18 option would be available to citizens of St. Lucie
19 County and not under the thumb of the School District?
20 Delay, deny and deceive seems to be the focus of this
21 District and you, as the School Board members, are
22 responsible for this.

23 This evening was reported as canceled by the
24 newspaper today. That information came from a
25 gentleman by the name of Patrick out of the School

1 District. Don't know who he is, but that's the
2 report; and it was in the papers this morning.

3 Do you or do you not want better education
4 in this County? Businesses choose not to locate in
5 this county because they don't want their children in
6 our school system. How can our county ever grow
7 economically with such a weak link, so weak and so
8 inept to continually keep better education from its
9 citizens?

10 The St. Lucie County School District will
11 now become the poster child for the charter school
12 movement to lobby once again for a state authorizer.
13 Your denial this evening will make a great white paper
14 to fire up parents throughout our state to get behind
15 this movement. I can see the headlines now: Worse
16 district in state denies quality charter school
17 operator. Or better yet: How our children are being
18 cheated by the status quo.

19 The citizen parents of this county --

20 MS. SHADDOCK: Excuse me that's two minutes.

21 MR. GOTZ: -- should recall every member of
22 this Board. It would be a just response to your
23 actions. Thank you.

24 DR. MILLS: Thank you, Mr. Gotz.

25 Ned Schuster.

1 MR. SCHUSTER: Well, I guess now we know why
2 there's a school bus in the parking lot, right.

3 Good evening. Let me start by saying that I
4 don't have a dog in this fight. I'm a firm believer
5 in giving parents as much choice as possible when it
6 comes to their child's education. In fact, my own
7 child attends middle school in this county through a
8 parental choice option opportunity.

9 That said, I must tell you how offended I am
10 for anyone to come to this microphone tonight and
11 state that they are the only A-rated public high
12 school in St. Lucie County and one of two A-rated
13 public high schools in the county -- I'm sorry, I
14 should have said Port St. Lucie -- is very, very
15 misleading to you and to the public. The five
16 traditional public high schools and one magnet school
17 in St. Lucie County receive 50 percent of their State
18 grade based on the Florida Assessment at the end of
19 each year. The other 50 percent is based on a number
20 of factors, including risk, graduation and, of course,
21 exams, reading and math readiness.

22 Because College Prep Academy has not had
23 graduating classes as of yet, they are scored -- they
24 are not scored using the high school matrix. Instead,
25 they are graded and scored based on the elementary

1 school matrix, which is 800 points less than the high
2 school matrix. So to proclaim that College
3 Preparatory Academy is an A school, as compared to the
4 six other schools in St. Lucie County, is the same
5 thing as comparing cherries to grapefruits.

6 I only bring this forward because I have
7 read all 200 pages of the charter application, along
8 with the addendums, memos and 40-page analysis by
9 District staff and I have some significant concerns.

10 May I have some additional time?

11 MS. SHADDOCK: That's two minutes.

12 DR. MILLS: We'll give him one more minute.

13 All right, but we did give some other people a couple
14 more seconds. So would you please conclude with what
15 you're saying is what I'm saying.

16 MR. SCHUSTER: While replicating a high
17 performance charter school, which Somerset College
18 Preparatory Academy seeks to do, you, as a board, do
19 not have a choice. If the application meets State
20 standards, you must approve the school. One of the
21 first things that the application seeks is a letter
22 from the Commissioner of Education certifying that the
23 school which is being replicated is a high performing
24 school. The certification letter that College
25 Preparatory Academy submitted with their application

1 was from 2011, four years and two Education
2 Commissioners ago. By only providing limited
3 transportation that is within only a two to a
4 four-mile radius of the campus, the school is
5 segregating students throughout this county.

6 DR. MILLS: Mr. Schuster, we need you to
7 wrap up, please and I think you've said enough for us
8 to get a clear picture of what you're saying. Thank
9 you.

10 MR. SCHUSTER: Okay, let me just read this
11 one last sentence. To finish it up? No, okay. Thank
12 you.

13 DR. MILLS: Okay, we're done at this time.
14 I know some of you had got pretty --

15 MS. KRISCHKE: I would like an extra 57
16 seconds, if you don't mind, Madame Chair.

17 DR. MILLS: Well, if -- Okay, now, you have
18 to stop clapping so you can hear me. We will give you
19 that, but we're not going to give everybody that.

20 MS. KRISCHKE: Dr. Mills, let me just
21 clarify something --

22 DR. MILLS: So, at this time, I will say we
23 will give you that 50 minutes, no on else.

24 MS. KRISCHKE: -- this is not a dog-and-pony
25 show. This is a Robert's Rules of Order publicly

1 announced meeting. If I were to do this at one of my
2 board meetings, the Governor would rip me out. Are
3 you kidding me? This is not a dog-and-pony show and I
4 don't think you can give -- Just because somebody
5 makes one little statement that favors the way this
6 Board is going, they get almost another minute and
7 everybody else is cut off.

8 Let me make my little 40-second statement.
9 On Open House this year at Lincoln Park Academy -- Who
10 don't get me wrong, I was lucky he went there, instead
11 of the other three F schools I had a choice of. I was
12 told on Open House that not just one, but two of my
13 children, two, both of them in magnet schools that are
14 A-rated schools, given a new math curriculum. Make
15 note of this, my son is in seventh grade and he's on
16 his fifth different math curriculum.

17 I don't believe Miss Rains would ever allow
18 that to happen. And how do I know that? Because I
19 think I value her as a person and I know her as a
20 person. It's just like when you elect elected
21 officials, if you can trust them and you value them,
22 you can trust they'll do what's right in office. And
23 it's the same thing with her, I think you can trust
24 that she's going to do what's right with this middle
25 school, instead of the yanking around that we've done.

1 So keep rolling your eyes, Miss Hensley, but
2 this is a public meeting.

3 DR. MILLS: At this time, we are going to
4 ask our fellow Board members if they have any comments
5 or any questions regarding the application of the
6 charter school and the Superintendent's
7 recommendations. Miss Hensley.

8 MS. HILSON: Yes, ma'am.

9 DR. MILLS: I'm sorry, Miss Hilson.

10 MS. HILSON: What comes before us -- I
11 celebrate the fact that you're here. I celebrate that
12 you want choice. We are a choice district.

13 But when a charter comes to us and it does
14 not fulfill what the State of Florida and Department
15 of Education is asking to be done, we, as elected
16 officials, have to follow the law. Sometimes it's not
17 convenient. I was outspoken about FCAT. I thought
18 FCAT was nothing more than a political ploy put on by
19 our legislators and I was very vocal about that.

20 This isn't about what you've come here
21 tonight about. And I do respect you for coming here
22 tonight. This is about the charter that was turned in
23 to our staff to meet the Department of Education
24 Standards. We have to follow the law. It does not
25 meet the criteria that's been given to us.

1 And I am very concerned about
2 transportation. I grew up in this county. I've been
3 through segregation. I've been through integration.
4 And anytime someone comes forth to me and says we will
5 not bus children -- All children are all children,
6 white, black, poor, Hispanic. All children -- Excuse
7 me. This is my time to speak. You've had your time.
8 This is my time to speak.

9 We are right now in a lawsuit with another
10 school because they are refusing to transport
11 students. And, in my mind, I represent all the
12 children of this county, not just certain children.

13 I'm disappointed that there's been a
14 misunderstanding that this charter that came before us
15 does not meet the Department of Education and the
16 State of Florida Standards. No matter what you and I
17 believe and however it's convenient for us to believe
18 what we want to believe, it is the law. And that's
19 why we have attorneys and staff that look at this
20 information. Do I trust my attorneys? Do I trust my
21 staff? Yes, I do. I have to.

22 But as an elected official, I honor all the
23 children in this county. I honor you. I have a
24 daughter that teaches at a charter school in another
25 county. So the fact that people think well, we're

1 anti charter, no, I am not. But rules and laws -- I
2 really have a pause that we have legislators telling
3 us that we don't have to meet that standard and by law
4 we do have to, I have to. I signed on as
5 Constitutional officer in the State of Florida. I
6 will follow the law, not just when it's convenient,
7 not just when I'm passionate about one thing or
8 another thing.

9 I do appreciate you being here and we do
10 hear you. We do have a love and a passion for every
11 child in this community. And I do appreciate your
12 time, but I will follow the law and I will follow what
13 the Department of Education says, whether I agree with
14 it or not. That's my job.

15 DR. MILLS: Do we have any more comments
16 from our Board?

17 AUDIENCE MEMBER: How many more of these big
18 yellow buses would you like in the parking lot to
19 prove we have transportation?

20 DR. MILLS: Mr. Ingersoll, please, you have
21 the table.

22 MR. INGERSOLL: First off, I'd like to thank
23 you all for coming, specifically the students. You
24 did a phenomenal job. And Miss Rains -- Go ahead, I
25 applaud you. Good job.

1 Miss Rains, definitely I want to thank you
2 for your leadership in your school. But most
3 importantly, students, what you have to realize here
4 is the biggest person in the room and the biggest
5 advocate you have is your parents. And I'm very
6 grateful for them.

7 I'm a parent too in St. Lucie County. I
8 have two children. I have a freshman that is going to
9 Port St. Lucie High School. Now I just live like two
10 blocks over from here. That was a twist given to me.
11 I don't see my daughter. I drop her off at the school
12 bus at 6:20 in the morning and I won't get her until
13 another three more hours. She has made her school her
14 community. She loves her school.

15 Now, I wish she'd go to the same school as
16 her brother. Her brother goes to Central. Her
17 brother's a junior. He will attain 29 credits from
18 Indian River Community College. He has made the best
19 of his opportunities. He plays three sports there and
20 has done very well. He loves his school.

21 And it's all about choice and we want to
22 give you that choice, but there's also a precedent
23 here that we have to set, along with expectation too.
24 Because with the expectation of my children, they are
25 going to go off to college. They're going to a

1 four-year university. They're going to go off and be
2 productive citizens and be voters and taxpayers.

3 That's what you're going to be, because that's the
4 expectation of your parents. And I appreciate that.

5 But again, we do have a precedent here that
6 we have to follow. We have an application process.
7 And, unfortunately, we were here this time last year.
8 My question is the same as your question is, why can't
9 we just move this thing along? Well, there's still
10 some questions and debates, our side, your side,
11 whoever side. Again, it's just about the children,
12 but somehow we have to work it out.

13 And if you don't know the next process, the
14 next process will be an appeal process where we'll go
15 and we will spend money, you'll spend money and we'll
16 just figure out who's right and who's wrong. Now, you
17 also have to realize this Board has also voted on some
18 charter schools. You know all of them are in Port
19 St. Lucie. What is it, five or six?

20 THE AUDIENCE: No middle.

21 MR. INGERSOLL: No middle. But you have to
22 think about it, we have K-8's. But am I fearful? No,
23 I love competition. Those of you that know me know I
24 love competition. And the way that I look at it is
25 what am going to be fearful about? You have what,

1 400 students, little bit more now?

2 MS. RAINS: Three twenty-five.

3 MR. INGERSOLL: Okay 325. If you look at
4 that, that's a drop in a bucket of what's at
5 Centennial High School at two seventy-nine, Treasure
6 Coast is at 2900.

7 THE AUDIENCE: (Inaudible).

8 MR. INGERSOLL: I know that and I understand
9 that point. But when you talk about being fearful,
10 I'm not really fearful of that, because I applaud the
11 effort. But you have to go through the process the
12 right way.

13 Because you haven't sat on this side,
14 there's just as many people that come out here for
15 approval, but when we do have to shut the school --
16 not your school, but we've had to shut schools in the
17 past, there's just as many people saying please keep
18 our school open. But the problem is it's F school, F
19 school, F school, F school with no -- with no -- Now,
20 listen, I've had to shut two charter schools down and
21 it's hard.

22 The problem is, is that they're like, well,
23 what's the reason? Well, they didn't go through the
24 right process sometimes. And that's all I have to say
25 is, if you go through the process the right way, it

1 will work. It's worked with other schools. Thank
2 you.

3 DR. MILLS: Okay. Any other Board member
4 here would like to speak?

5 MS. HENSLEY: We heard, Madame Chair, we
6 heard choice, choice, choice and we have for many
7 years worked diligently to provide a variety of
8 choices. In that particular zone, we have three
9 charter schools that have middle grades and we have a
10 charter lab school that has middle grades as well as,
11 what, five other schools that have middle grades?
12 There are a lot of choices within that zone for sixth,
13 seventh and eighth grade students. So I think that is
14 not the issue.

15 And I know that these wonderful students are
16 being successful at the high school and every kid that
17 we know loves their high school. We get kids up here
18 all the time and they all love their high schools or
19 they love their middle schools or they love their
20 elementary schools. So that's not really an issue
21 either. Students love their schools when they get
22 acclimated to their schools.

23 We have no fear of competition. Otherwise,
24 we would not have approved so many charters as we have
25 in the past. So I don't think that's an issue either.

1 And charter schools, by the way, are public schools.

2 So I know that we are Constitutional
3 officers. We have to follow the law. People can get
4 up and say whatever they want. They can be as
5 disingenuous as they want. They can have veil threats
6 against elected Constitutional officers if they want.
7 That doesn't change the fact that we have to follow
8 the law; and this Board has a standard and we have
9 always followed the law.

10 DR. MILLS: Thank you, Miss Hensley. Okay,
11 before we go into the next phase of this, I just want
12 to make some comments myself. I've been to the
13 Somerset College Prep Academy before. I've spoken to
14 the children there. I have enjoyed what -- my
15 experience. The children there when I went to speak
16 were like college students. They were so attentive.
17 And I know you're doing a great job, Miss Erika, and I
18 want the public to know that, that you have done an
19 excellent job.

20 Here's the problem: The problem is with the
21 State Statutes and with the evaluation that has come
22 before the Board. We have the application. We've
23 been given the application, and our Administration
24 staff. Out of 19 different areas of evaluation, 14 of
25 those areas did not meet the standards, not even

1 partial. We have three different standards. It's
2 either meet the standards, partially meet 'em or do
3 not meet the standards. Out of 19 different areas, we
4 have 13 or 14 that just did not meet the standards on
5 that application.

6 Now, here's what I would like to see and
7 I've already expressed this to Administration and I'll
8 say it again: I want us to work together with this
9 school to ensure that you can extend and move forward
10 in what you're doing. I do believe in you. I believe
11 you have done an excellent job. I believe you can do
12 an even better job. And it's all about, all about
13 children.

14 I've heard people come up one after the
15 other and it's what's right for your child. I've
16 heard young people come up and say they were
17 completely failing out and flunking out of the public
18 school system and now they're doing great.

19 But don't put us down in order to make
20 yourself look better. That starts wars. That doesn't
21 help people come together and prove and grow together.

22 We have excellent schools in this county.
23 All of my children went to school in this county. I
24 have a daughter that went to Yale University as a
25 result of graduating Westwood High School, okay.

1 Yeah, clap now. I want to hear that clapping. I have
2 a 15-year-old son, right now 15 years old, has one
3 more high school class to take; and all of his other
4 classes right now are college classes. He is
5 excelling. He absolutely loves his school and what
6 he's going through.

7 And we have all type of things to reach out
8 to the children of this community. So don't put us
9 down, because I think even though we all have a long
10 way to go, we've come a long way and we will continue
11 to do so. If I could tonight, I would say yes, but I
12 have to abide by the State Standards. I am a
13 Constitutional officer. That is what I've been
14 appointed to do by the State of Florida, to ensure
15 that people abide by their rules, regulations and
16 standards.

17 According to this app, it doesn't measure
18 up. So what I want to see us do from this point on is
19 I want us to work together, so that whatever app you
20 submit, as a school, will be able to be passed because
21 our Administration has helped you to see what they
22 need to see on that application; and we all work
23 together so that we will be abiding by the rules and
24 regulations of the State of Florida.

25 REPRESENTATIVE MAYFIELD: Actually, Madame

1 Chair, if you wouldn't mind, I'd like to correct one
2 of your Board members. And Mrs. Hensley, I'm sorry,
3 but I'm going to correct her.

4 By no means did I get up here and ask you to
5 not follow the law. That was not what I asked. What
6 I asked is that you reconsider the application and
7 review it again on the appeal. That is what this
8 workshop was all about.

9 So I wanted to make sure that I did not
10 leave this room and no one else left this room on your
11 comment that you were appalled that a lawmaker would
12 get up here and ask you to not abide by the law. That
13 is not what I said, so just to make sure the record is
14 straight.

15 I do applaud you, Madame Chair, for willing
16 to work with the parents and willing to work with the
17 charter school. And I did not criticize what you guys
18 have been doing. I just indicated the fact that
19 charter schools are good. We passed a law to
20 duplicate high performing charter schools. Mrs. Erika
21 has a high performing school, pointing that out, okay.
22 And I do appreciate you working with her and I do
23 appreciate you working with the parents.

24 But I want to make sure I leave here and
25 it's clear, I did not ask you not to follow the law.

1 I asked you to reconsider the application and I wanted
2 to make sure that was perfectly clear before I left
3 here.

4 DR. MILLS: Thank you very much. Now, we've
5 heard from everyone. We've heard all the comments.
6 You know you're my special friend, Mr. Villafranco,
7 but I have to, at this point, stop the comments and we
8 have to move forward.

9 MR. VILLAFRANCO: This isn't a comment.
10 This is a question based on what Dr. Mills said.
11 Dr. Mills said there are parts of this application
12 that are lacking. I am asking the Board if they could
13 please tell us on the record what specific 14 items
14 are lacking.

15 DR. MILLS: Okay, it's online. You can go
16 on our school line. You can also talk to the
17 principal there. She has the whole packet and all the
18 evaluations.

19 I think our Superintendent, Mr. Gent, would
20 like to make a comment before we move forward.

21 SUPERINTENDENT GENT: I just want to say
22 before the recommendation is read, it's going to be in
23 response to Representative Mayfield and it was
24 something I said at the very beginning, as well. We
25 offered to extend this out for another two weeks to a

1 month to work together to see if we could work through
2 the deficiencies, as we see them, so that they were
3 legally sufficient to bring them forward back to the
4 Board. The school itself decided not to do that.
5 That's not something that the Board has done, not
6 something that I've done. That was an offer that was
7 made. So I think that's important, as well, and
8 that's all the comments I have.

9 DR. MILLS: So that you know that we have
10 tried to work with the school to move forward with
11 this and postpone it; and for some reason that has not
12 been the case tonight. So now it must go -- The other
13 option is that we vote on it tonight and that is what
14 we are about to do, unless there's --

15 Are you saying something?

16 You are the only one, Miss Rains.

17 MS. RAINS: I understand.

18 DR. MILLS: Make it quick.

19 MS. RAINS: And I appreciate everybody's
20 support, but let's move on from this once I'm done.
21 Okay, thank you guys.

22 We submitted this -- As you guys pointed out
23 and I just want to make clear, we submitted this
24 application last August. We deferred it then, tabled
25 it, continued it, whatever the term is. At that

1 point, it was then denied. I resubmitted on May 1st.
2 I resubmitted again on August 1st.

3 So that option -- When we had that meeting
4 yesterday morning, we left that room with three
5 options: Option one was to move forward tonight with
6 your denial, which we will appeal. Option two was to
7 withdraw the application, and that is not an option.
8 And option three was to mutually agree to continue
9 this until October 27th meeting, during which time
10 your staff and people on my side of the table, and the
11 requirements would be Somerset, from the proposed
12 school to be replicated, myself and the Governing
13 Board member -- None of my Governing Board members
14 live up here. So that would be travel expense and
15 time for them; and they're a volunteer -- to come up
16 here and sit down and work through it. Both your
17 legal counsel, Dr. McGinn, and today on the phone
18 Mr. Gent said that there would still -- even if we did
19 that, there would be no guarantee of an approval at
20 the end of that on October 27th.

21 So we will move forward tonight. I would
22 ask you to vote. And we have met every standard
23 repeatedly. And if you look at what you guys have
24 posted on your site, the last summary page that you
25 guys gave, there's a response that you guys posted

1 from me, it's in red, and it tells you exactly what
2 page and paragraph every single bit of that is on.

3 DR. MILLS: Thank you, Miss Erika.

4 Board members, we have heard the
5 recommendations from the Superintendent. May I have a
6 motion. May I have a motion. Okay, I'll repeat
7 myself. We have heard the recommendations from the
8 Superintendent this evening. May I have a motion,
9 please.

10 MS. HILSON: So moved.

11 DR. MILLS: So moved by Miss Hilson.

12 MS. HENSLEY: Second.

13 DR. MILLS: Second by Miss Hensley. All in
14 favor.

15 THE BOARD: Aye.

16 DR. MILLS: Any opposed? Motion carries
17 five/zero.

18 At this time, the public hearing meeting is
19 officially concluded.

20 (Thereupon, at 6:43 p.m., the public meeting
21 is concluded.)

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5

Exhibit 5.	Somerset Governing Board Meeting Schedule
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SOMERSET ACADEMY, INC.

Principal / Corporate Address:
20801 Johnson Street
Pembroke Pines, Florida 33029

Alternate Mailing Address:
6340 Sunset Drive
South Miami, Florida 33143

Main Phone: 786.393.4455
Alternate Phone 305.669.2906

www.somersetacademyschools.com

BOARD OF DIRECTORS & OFFICERS

David Concepcion (Board Chair)
Lourdes Isla Marrero (Vice-Chair)
Ana Diaz (Secretary)
Todd German (Treasurer)
Raul Martinez, Jr. (Parent)
Jenny Esquijarosa (Parent)
Tony Morales (Student Alumni)
Louis Marin
George B. Ozuna

Bernardo Montero, President (Non-Voting)
Suzette Ruiz, Vice-President (Non-Voting)

2015 – 2016 Board Meeting Dates

*July 20, 2015 at 10:30 am at 6340 Sunset Drive, Miami, Florida 33143

*August 5, 2015 at 11:30 am at 6340 Sunset Drive, Miami, Florida 33143

*August 28, 2015 at 1:00 pm at 6340 Sunset Drive, Miami, Florida 33143

September 18, 2015 at Somerset Academy Canyons (9385 Boynton Beach Boulevard, Boynton Beach, 33432)

October 9, 2015 at 10:30 am at Somerset Prep Academy Jacksonville (1429 Broward Blvd, Jacksonville, 32218)

November 12, 2015 at 3pm EST at Somerset College Preparatory of the Treasure Coast
(501 NW University Blvd, Port St. Lucie, 34986) **Revised Date & Time*

December 14, 2015 at Somerset Academy North Lauderdale (7101 Kimberly Boulevard, North Lauderdale)

February 19, 2016 at Somerset Academy Silver Palms (23255 SW 115th Avenue, Miami, 33032)

March 11, 2016 at Somerset Academy Canyons (9385 Boynton Beach Boulevard, Boynton Beach, 33432)

April 8, 2016 at Somerset Academy Eagle Campus (8711 Lone Star Road, Jacksonville, 32211)

May 13, 2016 at Somerset Academy Central (9300 Pembroke Road, Miramar, 33025)

**June 17, 2016 at Somerset College Preparatory of the Treasure Coast (501 NW University Blvd, Port St. Lucie, 34986)

**Denotes Special Meeting*

***Denotes Annual Meeting of the Board of Directors*

Please note that all meetings are scheduled to begin at **12:00 pm EST unless otherwise noted**. The physical access point of each meeting is noted above; all meetings are open to the public to attend. To best accommodate our parents & the community, the Board shall establish access to local physical meeting sites via CMT (Communications Media Technology) at each of the individual school campuses throughout Dade, Broward, Palm Beach, St. Lucie, and Duval Counties to allow greater public participation. Members of the public who wish to attend a meeting at an individual school campus / established local physical meeting site should contact Kelly Mallon at kmallon@academica.org to make such arrangements at least 12 hours prior to the meeting's start time. Members of the public attending the meeting at a local physical access site will be provided the opportunity to participate in the meeting via CMT and shall receive all meeting information and the opportunity to provide input regarding the charter school's operations.

Somerset Academy, Inc., a non-profit organization, will comply with chapter 119 of the Florida Statutes, relating to public records, and s. 286.011, relating to public meetings and records, public inspection, and penalties the Florida Statutes relating to public records and public meetings.

Please note that these dates are only proposed meeting dates and times. In the event that the date must be changed a notice will be posted at www.somersetacademyschools.com no less than 24 hours prior to the meeting.

To be scheduled to speak before the charter school board, a "Board Speaker Form" should be submitted no later than 3 business / school days preceding the meeting date to:

Somerset Academy, Inc.
Board of Directors
c/o 6340 Sunset Drive
Miami, Florida 33143
Attn: Kelly Mallon
Phone: (305) 669-2906
Fax: (305) 669-4390
kmallon@academica.org

As an alternative, a written or emailed request will be accepted with the same deadline as above.

The request should indicate:

- Name
- Address
- Telephone number
- Organization you represent (*if applicable*)
 - School you wish to speak about
 - Topic to be presented

Note: Members of the public that wish to address the Board will have a maximum amount of time (3 minutes) to speak at the discretion of the Board Chair. The Board will not address the presenter or take action at this time.

Board Workshops or Other Public Meeting Notices

Finance & Strategic Planning Committee Meeting
Friday, November 6, 2015 at 11:00 am (6340 Sunset Drive, South Miami, Florida, 33143)

Exhibit 6.	Somerset Academy Inc. 2013-2014 Form 990 (redacted)
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6

TAX RETURN FILING INSTRUCTIONS

FORM 990

FOR THE YEAR ENDING

JUNE 30, 2014

Prepared for	SOMERSET ACADEMY, INC. 6340 SUNSET DRIVE MIAMI, FL 33143
Prepared by	HLB GRAVIER, LLP 396 ALHAMBRA CIRCLE, SUITE 900 CORAL GABLES, FL 33134-5095
Amount due or refund	NOT APPLICABLE
Make check payable to	NOT APPLICABLE
Mail tax return and check (if applicable) to	DEPARTMENT OF THE TREASURY INTERNAL REVENUE SERVICE CENTER OGDEN, UT 84201-0027
Return must be mailed on or before	MAY 15, 2015
Special Instructions	THE RETURN SHOULD BE SIGNED AND DATED.

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Department of the Treasury
Internal Revenue Service

Do not enter Social Security numbers on this form as it may be made public.

Information about Form 990 and its instructions is at www.irs.gov/form990.

A For the 2013 calendar year, or tax year beginning **JUL 1, 2013** and ending **JUN 30, 2014**

B Check if applicable:

- Address change
- Name change
- Initial return
- Terminated
- Amended return
- Application pending

C Name of organization
SOMERSET ACADEMY, INC.

Doing Business As

Number and street (or P.O. box if mail is not delivered to street address) Room/suite
6340 SUNSET DRIVE

City or town, state or province, country, and ZIP or foreign postal code
MIAMI, FL 33143

D Employer identification number

[REDACTED]

E Telephone number

[REDACTED]

G Gross receipts \$ [REDACTED]

H(a) Is this a group return for subordinates? Yes No

H(b) Are all subordinates included? Yes No
If "No," attach a list. (see instructions)

F Name and address of principal officer: **ANDREINA FIGUEROA**
6340 SUNSET DRIVE, MIAMI, FL 33143

I Tax-exempt status: 501(c)(3) 501(c) () (insert no.) 4947(a)(1) or 527

J Website: **WWW.SOMERSETACADEMY.COM**

H(c) Group exemption number ▶

L Year of formation: **1997** **M** State of legal domicile: **FL**

Part I Summary

1 Briefly describe the organization's mission or most significant activities: **ESTABLISHED AS A CHARTER SCHOOL OPERATOR IN THE DISTRICT SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA**

2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a) **3**

4 Number of independent voting members of the governing body (Part VI, line 1b) **4**

5 Total number of individuals employed in calendar year 2013 (Part V, line 2a) **2137**

6 Total number of volunteers (estimate if necessary) **6642**

7 a Total unrelated business revenue from Part VIII, column (C), line 12 **0.**

b Net unrelated business taxable income from Form 990-T, line 34 **0.**

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h)	[REDACTED]	[REDACTED]
9 Program service revenue (Part VIII, line 2g)	[REDACTED]	[REDACTED]
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	[REDACTED]	[REDACTED]
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	[REDACTED]	[REDACTED]
12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	[REDACTED]	[REDACTED]
13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	[REDACTED]	[REDACTED]
14 Benefits paid to or for members (Part IX, column (A), line 4)	[REDACTED]	[REDACTED]
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	[REDACTED]	[REDACTED]
16a Professional fundraising fees (Part IX, column (A), line 11e)	[REDACTED]	[REDACTED]
b Total fundraising expenses (Part IX, column (D), line 25) 0.	[REDACTED]	[REDACTED]
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	[REDACTED]	[REDACTED]
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	[REDACTED]	[REDACTED]
19 Revenue less expenses. Subtract line 18 from line 12	[REDACTED]	[REDACTED]
20 Total assets (Part X, line 15)	[REDACTED]	[REDACTED]
21 Total liabilities (Part X, line 25)	[REDACTED]	[REDACTED]
22 Net assets or fund balances. Subtract line 21 from line 20	[REDACTED]	[REDACTED]

Part II Signature Block

Under penalties of perjury, I declare that I prepared this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here Signature of officer: **ANA MARIA MARTINEZ, AUTHORIZED REPRESENTATIVE** Date: _____
Type or print name and title

Paid Preparer Use Only Print/Type preparer's name: **LEONARDO D. GRAVIER** Preparer's signature: [Signature] Date: **5/14/15** Check if self-employed: PTIN: [REDACTED]
Firm's name: **HLB GRAVIER, LLP** Firm's EIN: [REDACTED]
Firm's address: **396 ALHAMBRA CIRCLE, SUITE 900 CORAL GABLES, FL 33134-5095** Phone no. **305-446-3022**

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

7

Exhibit 7.	Corporate Documents
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Detail by Entity Name

Florida Not For Profit Corporation

SOMERSET ACADEMY, INC.

Filing Information

Document Number	N97000002553
FEI/EIN Number	31-1569428
Date Filed	05/05/1997
State	FL
Status	ACTIVE
Last Event	REINSTATEMENT
Event Date Filed	10/18/2000

Principal Address

20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Changed: 04/26/2006

Mailing Address

6340 SUNSET DRIVE
MIAMI, FL 33143

Changed: 05/20/2010

Registered Agent Name & Address

CORPORATION SERVICE COMPANY
1201 HAYS STREET
TALLAHASSEE, FL 32301

Name Changed: 04/27/2015

Address Changed: 04/27/2015

Officer/Director Detail

Name & Address

Title VC, Director

ISLA, LOURDES
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title Director, Chairman

CONCEPCION, DAVID
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title Director, Secretary

DIAZ, ANA
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title VC, Director

MARIN, LOUIS
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title Director

OZUNA, GEORGE
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title Director

MORALES, TONY
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title Director

MARTINEZ, RAUL
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title President

MONTERO, BERNIE
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title Director

ESQUIJAROSA, JENNIFER
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title VP

RUIZ, SUZETTE
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Title VP

RUIZ, SUZETTE
20801 JOHNSON STREET
PEMBROKE PINES, FL 33029

Annual Reports

Report Year	Filed Date
2014	04/30/2014
2014	09/19/2014
2015	04/27/2015

Document Images

<u>04/27/2015 -- ANNUAL REPORT</u>	View image in PDF format
<u>09/19/2014 -- AMENDED ANNUAL REPORT</u>	View image in PDF format
<u>04/30/2014 -- ANNUAL REPORT</u>	View image in PDF format
<u>05/01/2013 -- ANNUAL REPORT</u>	View image in PDF format
<u>04/30/2012 -- ANNUAL REPORT</u>	View image in PDF format
<u>04/28/2011 -- ANNUAL REPORT</u>	View image in PDF format
<u>05/20/2010 -- ANNUAL REPORT</u>	View image in PDF format
<u>04/21/2009 -- ANNUAL REPORT</u>	View image in PDF format
<u>04/29/2008 -- ANNUAL REPORT</u>	View image in PDF format
<u>05/11/2007 -- ANNUAL REPORT</u>	View image in PDF format
<u>12/06/2006 -- ANNUAL REPORT</u>	View image in PDF format
<u>04/26/2006 -- ANNUAL REPORT</u>	View image in PDF format
<u>02/14/2005 -- ANNUAL REPORT</u>	View image in PDF format
<u>04/21/2004 -- ANNUAL REPORT</u>	View image in PDF format
<u>04/16/2004 -- Off/Dir Resignation</u>	View image in PDF format
<u>04/15/2004 -- REINSTATEMENT</u>	View image in PDF format
<u>02/19/2004 -- ANNUAL REPORT</u>	View image in PDF format
<u>05/07/2003 -- ANNUAL REPORT</u>	View image in PDF format
<u>03/05/2002 -- ANNUAL REPORT</u>	View image in PDF format
<u>11/20/2001 -- Off/Dir Resignation</u>	View image in PDF format
<u>02/03/2001 -- ANNUAL REPORT</u>	View image in PDF format
<u>10/18/2000 -- REINSTATEMENT</u>	View image in PDF format
<u>03/02/2000 -- Name Change</u>	View image in PDF format
<u>02/03/1999 -- REINSTATEMENT</u>	View image in PDF format



Detail by Entity Name

Florida Limited Liability Company

ACADEMICA DADE LLC

Filing Information

Document Number L05000029409
FE/EIN Number 20-2594169
Date Filed 03/22/2005
State FL
Status ACTIVE

Principal Address

6340 SUNSET DR.
MIAMI, FL 33143

Changed: 02/15/2011

Mailing Address

6340 SUNSET DR.
MIAMI, FL 33143

Changed: 02/15/2011

Registered Agent Name & Address

PAPA, COLLETTE ESQ.
6340 SUNSET DRIVE
MIAMI, FL 33143

Name Changed: 02/15/2011

Address Changed: 02/15/2011

Authorized Person(s) Detail

Name & Address

Title MGR

ACADEMICA MANAGEMENT LLC
6340 SUNSET DR.
MIAMI, FL 33143

Annual Reports

Report Year	Filed Date
2013	04/09/2013
2014	04/15/2014
2015	04/13/2015

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03/22/2005 -- Florida Limited Liabilities	View image in PDF format

Exhibit 8.	Cited Caselaw
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8

IN THE DISTRICT COURT OF APPEAL OF THE STATE OF FLORIDA
FIFTH DISTRICT

JANUARY TERM 2013

NOT FINAL UNTIL TIME EXPIRES TO
FILE MOTION FOR REHEARING AND
DISPOSITION THEREOF IF FILED

SCHOOL BOARD OF SEMINOLE COUNTY,
FLORIDA,

Appellant,

v.

Case No. 5D12-2473

RENAISSANCE CHARTER SCHOOL, INC.,
and RENAISSANCE CHARTER SCHOOL AT
SEMINOLE,

Appellees.

Opinion filed April 26, 2013.

Administrative Appeal from the
Florida State Board of Education.

Donna E. Blanton of Radey Thomas Yon &
Clark, P.A., Tallahassee, and Ned N.
Julian, Jr., Serita D. Beamon of Seminole
County Schools, Sanford, for Appellant.

Edward J. Pozzuoli and Stephanie
Alexander of Tripp Scott, P.A., Fort
Lauderdale, for Appellees.

JACOBUS, J.

The School Board of Seminole County, Florida ("School Board") timely appeals an order of the Florida State Board of Education ("State Board"). The order allows Renaissance Charter School, Inc., and Renaissance Charter School at Seminole

(collectively "Renaissance") to operate a charter school in Seminole County over the objections of the School Board. We reverse.

On August 1, 2011, Renaissance filed an application with the School Board to open a new charter school in Seminole County in the fall of 2012. The proposed school was to be named the Renaissance Charter School at Seminole and was to serve grades K through 6 in its first year, grades K through 7 in its second year, and grades K through 8 thereafter. Renaissance hoped to open the school with 862 students and to grow to 1,415 students by its fifth year. The application was made pursuant to section 1002.331, Florida Statutes (2011), which allowed Renaissance to replicate a "high-performing" charter school already in operation. The high-performing charter school that Renaissance professed to be replicating was the North Broward County Academy of Excellence Middle School, a middle school which serves grades 6 through 8. The school was to be managed by Charter Schools USA, an "education service provider" ("ESP"), which manages approximately thirty schools in three states.

A workshop was held on the application, and the superintendent, Bill Vogel, completed a twenty-five page, State Board-required Florida Charter School Application Evaluation Instrument with respect to the application. See Fla. Admin. Code R. 6A-6.0786. Based on the criteria outlined in the instrument, the superintendent recommended the denial of Renaissance's application. The School Board later voted unanimously in favor of denial and the outcome was formally communicated to Renaissance in a letter dated October 6, 2011. The four-page letter stated the application had been denied because Renaissance's proposed program: 1) did not substantially replicate the educational program of the high-performing charter school; 2)

did not provide an adequate financial plan; 3) failed to identify how it would meet the statutorily-defined purpose of meeting high standards of student achievement; 4) failed to show an arm's length relationship between the school's ESP, Charter Schools USA, and the governing board; and 5) did not have a sufficient plan for English language learners ("ELL").

Renaissance appealed the School Board's denial of its application to the State Board on November 7, 2011. The record provided to the State Board included the application, a copy of the letter from the School Board denying the application, and a video transcript of the school board meeting. The School Board's response included all relevant documents, including a transcript of the workshop. At a hearing on the appeal, the State Board heard numerous charter school appeals. After cursory discussion and an agreement that the issues were essentially the same as involved in a prior appeal, the State Board unanimously "granted" Renaissance's appeal. The Commissioner of Education's final order memorializing the State Board's decision was entered on May 21, 2012. The reason given for reversing the School Board's decision was that it had "failed to show by clear and convincing evidence that the Charter Applicant's application did not materially comply with the requirements of Section 1002.33(6)(c)3.b., Florida Statutes."

The School Board appealed the State Board's order, requiring it to permit Renaissance to open and operate a charter school in Seminole County. Among the numerous reasons given to reverse the State Board's decision, we find one issue dispositive of the appeal. We agree with the School Board that Renaissance's proposed charter school's educational program did not "substantially replicate" that of

the high-performing charter school being replicated -- that of North Broward Academy of Excellence Middle School -- and that the order granting Renaissance's application must therefore be reversed.

The "substantially replicates" requirement is contained in those provisions of the charter school statute which refer to "high-performing" charter schools. Schools identified as "high-performing" charter schools pursuant to section 1002.331, Florida Statutes, are given preferential treatment in the application process. They are entitled to submit an application to a sponsor¹ to establish and operate a new charter school that will "substantially replicate" its educational program in an existing school. The statute states:

(a) A high-performing charter school may submit an application pursuant to s. 1002.33(6) in any school district in the state to establish and operate a new charter school that will substantially replicate its educational program. An application submitted by a high-performing charter school must state that the application is being submitted pursuant to this paragraph and must include the verification letter provided by the Commissioner of Education pursuant to subsection (5). If the sponsor fails to act on the application within 60 days after receipt, the application is deemed approved and the procedure in s. 1002.33(6)(h) applies. If the sponsor denies the application, the high-performing charter school may appeal pursuant to s. 1002.33(6).

(b) A high-performing charter school may not establish more than one charter school within the state under paragraph (a) in any year. A subsequent application to establish a charter school under paragraph (a) may not be submitted unless

¹ An application to open a charter school may be made by an individual, teachers, parents, a group of individuals, a municipality, or a legal entity organized under the laws of Florida. § 1002.33(3)(a), Fla. Stat. Charter schools must have a public sponsor -- either a district school board or a state university. § 1002.33(5)(a), Fla. Stat. The sponsor must perform a number of duties, including monitoring and reviewing the school and monitoring the revenues of the school. § 1002.33(5)(b), Fla. Stat.

each charter school established in this manner achieves high-performing charter school status.

§ 1002.331(3)(a)-(b), Fla. Stat. (emphasis supplied).

One of the permitted reasons to deny an application is if the sponsor demonstrates by "clear and convincing evidence" that "[t]he proposed charter school's educational program does not substantially replicate that of the applicant or one of the applicant's high-performing charter schools. . . ." § 1002.33(6)(b)3.b.(III), Fla. Stat. The statute explains the requirement as follows:

An applicant is considered to be replicating a high-performing charter school if the proposed school is substantially similar to at least one of the applicant's high-performing charter schools and the organization or individuals involved in the establishment and operation of the proposed school are significantly involved in the operation of replicated schools.

§ 1002.33(6)(b)3.b., Fla. Stat.

The School Board found that the requirement had not been met because the application submitted by Renaissance sought to open a school for grades K through 8, while the school being replicated served only students in grades 6 through 8. The denial letter explained:

There are fundamental differences in the educational program (i.e., standards-based curriculum, standards-based instruction, standards-based assessments, professional development for teachers and administrators on instructional materials aligned to standards, etc.) between a middle school and an elementary school.

The State Board apparently rejected this reasoning, accepting Renaissance's argument that a new charter school does not have to "exactly match" the high-performing school upon which it is modeled and the school in this case meets the "substantially replicates"

requirement, as the schools shared a substantially similar instruction model and the very same organizations, i.e., the very same governing board and ESP.

The Legislature has delegated to the State Board the statutory power to hear an appeal from the denial of a high-performing charter school application. §§ 1002.33(6)(b)3.c. and 1002.33(6)(c)3.b., Fla. Stat. The State Board's interpretation of the statute is entitled to great deference and this Court is required to defer to the State Board's interpretation unless it is clearly erroneous. See Verizon Fla., Inc. v. Jacobs, 810 So. 2d 906, 908 (Fla. 2002) ("An agency's interpretation of the statute it is charged with enforcing is entitled to great deference."); Imhotep-Nguzo Saba Charter Sch. v. Dep't of Educ., 947 So. 2d 1279, 1285 (Fla. 4th DCA 2007). However, we agree with the School Board that to be "substantially similar" within the meaning of the Florida Statutes, a charter school must have the same characteristics and be alike in substance or essentials to the school it is replicating. Common sense dictates that a middle school, which covers only grades 6 through 8, is materially different from a K through 8 school. As the superintendent noted in his denial letter, "[t]here is a substantial difference in the curriculum, teaching strategies, student learning rates, discipline, student management, emotional maturity, teaching focus, and other factors between a middle school and an elementary school."

Moreover, by allowing Renaissance to use a middle school to establish what is essentially two schools, e.g., for which it elsewhere has two charters, and by allowing it to use the elementary portion of the school being replicated (North Broward Elementary) to establish yet another school (this one in Lake County), the State Board is allowing Renaissance to sidestep the limitations imposed by section 1002.331(3)(b), Florida

Statutes, which states that "[a] high-performing charter school may not establish more than one charter school within the state under paragraph (a) in any year." The State Board's interpretation of the statute essentially doubles the pace at which high-performing charter schools can be replicated within the State.

Renaissance argues that North Broward Academy of Excellence Elementary and Middle Schools are actually one, big K through 8 school, noting that they are housed in the same building and share a website. See <http://www.northbrowardcharter.org>. However, as noted by the School Board, these two schools are reported to the Department of Education as separate schools and operate under two separate charters sponsored by the School Board of Broward County. Each of the schools receives separate school grades, as shown by Renaissance in its brief to the School Board. Moreover, Renaissance apparently submitted two separate high-performing applications to two different county school districts in Florida in 2011 based on these schools. These submissions are inconsistent with Renaissance's current argument that North Broward Elementary and North Broward Middle are "one, big K-8 school."

Review in this case has been hampered by deficiencies in the underlying statute. The Legislature has indicated a clear preference for encouraging alternative forms of education through the charter school statute. However, the statute as formulated has many shortcomings. The high-performing charter school provisions exemplify these deficiencies. For example, high-performing charter school applications can be denied by the sponsor only if the sponsor demonstrates one of five statutory factors by "clear and convincing" evidence, but the statute does not make clear in what forum a sponsor is to present "clear and convincing evidence" sufficient to deny the application and

contains no express provisions for a hearing. § 1002.33(6)(b)3.b., Fla. Stat. The State Board is then required to review the School Board's decision to determine whether the sponsor has shown, by clear and convincing evidence, one of the five reasons listed for denying the application, but there is no real record for the State Board to review with respect to high-performing charter schools. See § 1002.33(6)(c)3.a., Fla. Stat. This Court's standard of review is also less than clear. In similar cases, courts normally review the State Board's decision to determine whether its factual findings are supported by competent, substantial evidence and whether it erroneously interpreted the law. Spiral Tech Elementary Charter Sch. v. Sch. Bd. of Miami-Dade Cnty., 994 So. 2d 455, 455 (Fla. 3d DCA 2008) (involving decision to terminate charter school under provision which allowed sponsor to decide not to renew charter, which required sponsor to articulate reasons in writing, and which allowed charter school to appeal to state's Department of Education). However, high-performing school applications involve a negative -- the State Board must find the School Board failed to present clear and convincing evidence to deny the application. This Court's standard of review thus appears to involve the virtually incomprehensible standard of whether there is competent substantial evidence to support the State Board's decision that there is an absence of clear and convincing evidence supporting the School Board's denial of the application. The statute also raises issues of due process by its failure to expressly provide for any form of evidentiary hearing or review.

The issues are less pronounced in this case, which involves the State Board's interpretation of the relevant statute and its requirement that the charter school applicant "substantially replicate" an existing school. We have no difficulty finding in this

case that the School Board had before it "clear and convincing" evidence that the requirement had not been met, and that the State Board erred in interpreting the statute to include the replication involved in this case. We find no due process violation within the context of this case, in which no request for a formal hearing was ever made. The Administrative Procedure Act ("APA") plainly does not apply to proceedings before the State Board and, in view of the time limitation set forth in the statute, it is doubtful that the APA applies to proceedings before individual school boards. See Sch. Bd. of Palm Beach Cnty. v. Survivors Charter Sch., Inc., 3 So. 3d 1220 (Fla. 2009) (holding that charters schools were not entitled to hearing under APA when school board terminated charter under section 1002.33(8)(d), Florida Statutes; review of the charter school statute which provides for immediate termination of charter under emergency conditions did not require APA hearing that would prolong termination; interpretation was consistent with fact that legislature did not require APA hearing for non-emergency terminations and had set forth detailed statutory procedure). In view of the foregoing, we reverse the order of the State Board approving Renaissance's application.

REVERSED.

LAWSON and BERGER, JJ., concur.

944 scheduled a hearing for December 21, 2000. Notice of the hearing was published in the *Key West Citizen* newspaper on November 30 and December 7, 2000. Although the notice listed the wrong case number, it did contain the text of the *944 circuit court's order. Citizens moved for a continuance of the hearing on December 20, which the court denied. However, Citizens was granted intervenor status, and its counsel appeared by telephone at the bond validation hearing on December 21.

Following the hearing, the court entered final judgment validating the bonds. The court's order included two paragraphs requiring all sewer system customers to permit access for connection without payment by the Authority and requiring all property owners in the Authority's geographical jurisdiction to connect to the sewer systems at their own expense. Citizens' motion for reconsideration and amendment of the final judgment was denied.

Citizens has appealed the matter to this Court under our mandatory bond validation jurisdiction. The Authority filed a motion to expedite the appeal and to waive oral argument. The Authority argued that the timing of the project financed by the bonds is critical in order to receive over \$4 million from a federal grant. This Court granted the Authority's motion to expedite resolution of the case and accepted the case without oral argument.

Bond validation proceedings are governed by chapter 75, Florida Statutes. As this Court explained in *State v. City of Miami*, 103 So.2d 185, 188 (Fla.1958), the statutes governing bond validation proceedings provide for speedy disposition of these cases. Further, the rules of this Court also recognize the necessity for the prompt disposition of these cases. *Compare* Fla. R.App. P. 9.110(i) with Fla. R.App. P. 9.110(f) (providing that the appellant's initial brief in a bond validation appeal shall be served within twenty days of filing the notice of appeal whereas initial briefs in other appeals must be served within seventy days of filing the notice). Thus, the "speedy and efficient disposition of bond validation proceedings," which is the purpose of both the statute and the rules, would be seriously impaired if collateral matters were injected into the proceedings. *City of Miami*, 103 So.2d at 188. This Court has reiterated its position that

It was never intended that proceedings instituted under the authority of this chapter to validate governmental securities would be used for the purpose of deciding collateral issues or those issues not going directly to the power to issue the securities and the validity of the proceedings with relation thereto.

Id.; see also *Noble v. Martin County Health Facilities Auth.*, 682 So.2d 1089, 1090 (Fla.1996); *City of Gainesville v. State*, 366 So.2d 1164, 1166 (Fla.1979).

The scope of this Court's inquiry in bond validation hearings is limited to the following considerations: (1) determining whether the public body has the authority to issue the bonds; (2) determining whether the purpose of the obligation is legal; and (3) ensuring that the bond issuance complies with the requirements of law. See *Murphy v. Lee County*, 763 So.2d 300, 302 (Fla.2000). Citizens does not question the Authority's power to issue the bonds or that the purpose of the obligation is legal. Instead, Citizens argues that the court's validation of the mandatory connection requirement was beyond the scope of the bond validation proceeding. Citizens raises three issues relating to the mandatory connection requirement in this appeal. Citizens argues that (1) validation of the mandatory connection requirement was not a proper part of the chapter 75 bond validation proceeding and should be stricken from the final judgment; (2) even if the mandatory connection provisions are not removed, the final judgment still should not have a res judicata or collateral estoppel effect on further challenges to the mandatory connection requirement; and (3) the validation proceeding violated its rights to due process.

945 *945 Section 75.01, Florida Statutes (2000), vests the circuit courts with "jurisdiction to determine the validation of bonds and certificates of indebtedness and *all matters connected therewith*." (Emphasis added.) It is the meaning of the phrase "all matters connected therewith" which is the crux of the instant appeal. Section 75.09, Florida Statutes (2000), provides that the final judgment in a bond validation proceeding is "conclusive as to all matters adjudicated against plaintiff and all parties affected thereby, including all property owners, taxpayers and citizens of the plaintiff, and all others having or claiming any right, title or interest in the property to be affected by the issuance of said bonds ... and the validity of said bonds ... shall never be called in question in any court by any person or party." If the Court determines that the mandatory connection requirement was a proper matter connected with the bonds, then the final judgment will be conclusive as to that issue and the requirement cannot be challenged in a subsequent proceeding.

Court stated that even if the ordinance were relevant to its review, the Court would presume that the city would enact a valid ordinance. *See id.*

947 The instant case presents the flip side of *DeSha*. Pursuant to Florida law, Monroe County *has* enacted a mandatory connection ordinance. *See* Monroe County Ordinance No. 04-2000 (Jan. 19, 2000); *see also* § 381.00655, Fla. Stat. (2000) (providing that property owners must connect to available sewer systems within one year of receiving notification of availability); ch. 99-395, § 4, at 4068, Laws of Fla. (authorizing local governments within the Florida Keys area of critical state concern to enact an ordinance requiring connection to a *947 central sewer system within thirty days). Further, the Authority's bond resolution, which authorizes the issuance of sewer revenue bonds in various series to finance the Authority's sewer projects in the Florida Keys, includes a provision requiring compulsory connection by every property owner in the area of operation in order that the connection fees and service charges may "secure the prompt payment of principal and interest on the Bonds." Florida Keys Aqueduct Authority Resolution No. 00-20, at 51 (Oct. 18, 2000). Thus, unlike *DeSha*, the validity of an *existing* connection ordinance was squarely before the circuit court as part of the bond validation proceeding.

Contrary to Citizens' assertion, we do not find that *DeSha* stands for the broad proposition that a mandatory connection ordinance will *always* be a collateral issue in a bond validation proceeding. In the instant case, as in *Port Orange* and *GRW*, the mandatory connection fees and rates charged for the service rendered to the properties connected to the central sewer system are tied to the financing agreement upon which the bonds will be secured. Thus, the validity of the mandatory connection ordinance was not a collateral issue, but part of the trial court's inquiry into whether the public body has the authority to issue the bonds. *See Port Orange, 650 So.2d at 3.* As this Court explained in *State v. Manatee County Port Authority, 171 So.2d 169, 171 (Fla.1965)*, "[t]he function of a validation proceeding is merely to settle the basic validity of the securities and the power of the issuing agency to act in the premises. Its objective is to put in repose any question of law or fact affecting the validity of the bonds." Additionally, at the bond validation hearing in the instant case the trial court heard evidence that mandatory connection is required both by Florida statute and by Monroe County ordinance, and that both the economic feasibility of the central sewer system and the public purpose for this project are predicated on the hook-up of all property in the area of operation. Thus, the mandatory connection was an appropriate issue for this bond validation proceeding.

948 Having determined that the validation of the mandatory connection requirement was a proper part of the bond validation proceeding, we find that issue two is moot and that the final judgment will necessarily foreclose any further challenges. *See* § 75.09, Fla. Stat. (2000) (explaining effect of final judgment). Further, there is little doubt that all residents of the Florida Keys can be required to connect to a central sewer system by virtue of the mandatory connection ordinance. *See, e.g., Stern v. Halligan, 158 F.3d 729, 734 (3d Cir.1998)* ("It cannot escape our notice that from the inception of such sanitary programs ... courts have routinely rejected constitutional challenges to mandatory connection requirements."). As discussed above, Florida law provides that property owners with existing onsite sewage treatment and disposal systems must connect to a central sewerage system within a specified time of being notified that the central system is available for connection. *See* § 381.00655, Fla. Stat. (2000). As early as 1976, the Legislature gave the Authority power to prohibit the use of septic tanks and other sanitary structures, provided that adequate alternate facilities are available. *See* ch. 76-441, § (9)(a), at 312, Laws of Fla. In 1998, the Legislature gave the Authority power to require mandatory hookup to specific wastewater treatment plants in order to manage effluent disposal and wastewater matters. *See* ch. 98-519, § 6, at 298, Laws of Fla. The Governor's Executive Order 98-309 also provides that onsite treatment systems in the Florida Keys will be abandoned when central sewage systems become *948 available and that connection to such systems shall be mandatory. Additionally, in 1999 the Legislature gave local governments within the Florida Keys area the power to enact ordinances requiring connection to a central sewage system within thirty days after notice of the availability of service. *See* ch. 99-395, § 4, at 4068, Laws of Fla. This is exactly what Monroe County did in County Ordinance 04-2000.

Finally, even though the Court finds that the validity of the mandatory connection requirement was a proper part of the bond validation proceeding, we still address Citizens' argument that the circuit court's consideration of the issue violated procedural due process.

The basic due process guarantee of the Florida Constitution provides that "[n]o person shall be deprived of life, liberty or property without due process of law." Art. I, § 9, Fla. Const. The Fifth Amendment to the United States Constitution guarantees the same. As this Court explained in Department of Law Enforcement v. Real Property, 588 So.2d 957, 960 (Fla.1991), "[p]rocedural due process serves as a vehicle to ensure fair treatment through the proper administration of justice where substantive rights are at issue." Procedural due process requires both fair notice and a real opportunity to be heard. See *id.* As the United States Supreme Court explained, the notice must be "reasonably calculated, under all the circumstances, to apprise interested parties of the pendency of the action and afford them an opportunity to present their objections. The notice must be of such nature as reasonably to convey the required information, and it must afford a reasonable time for those interested to make their appearance." Mullane v. Central Hanover Bank & Trust Co., 339 U.S. 306, 314, 70 S.Ct. 652, 94 L.Ed. 865 (1950) (citations omitted). Further the opportunity to be heard must be "at a meaningful time and in a meaningful manner." Mathews v. Eldridge, 424 U.S. 319, 333, 96 S.Ct. 893, 47 L.Ed.2d 18 (1976); accord Fuentes v. Shevin, 407 U.S. 67, 80, 92 S.Ct. 1983, 32 L.Ed.2d 556 (1972) (stating that procedural due process under the Fourteenth Amendment of the United States Constitution guarantees notice and an opportunity to be heard at a meaningful time and in a meaningful manner).

The specific parameters of the notice and the opportunity to be heard required by procedural due process are not evaluated by fixed rules of law, but rather by the requirements of the particular proceeding. See Gilbert v. Homar, 520 U.S. 924, 117 S.Ct. 1807, 138 L.Ed.2d 120 (1997); see also Mullane, 339 U.S. at 313, 70 S.Ct. 652 (stating that notice and opportunity for hearing need only be appropriate to the nature of the case). As the Supreme Court has explained, due process, "unlike some legal rules, is not a technical concept with a fixed content unrelated to time, place and circumstances." Cafeteria & Restaurant Workers Union, Local 473, AFL-CIO v. McElroy, 367 U.S. 886, 895, 81 S.Ct. 1743, 6 L.Ed.2d 1230 (1961). Instead, "due process is flexible and calls for such procedural protections as the particular situation demands." Morrissey v. Brewer, 408 U.S. 471, 481, 92 S.Ct. 2593, 33 L.Ed.2d 484 (1972).

In order to determine what process is constitutionally required, the Court "must begin with a determination of the precise nature of the government function involved as well as of the private interest that has been affected by governmental action." Cafeteria & Restaurant Workers Union, 367 U.S. at 895, 81 S.Ct. 1743. Three factors are relevant in determining what process is constitutionally due: (1) the private interest that will be affected by the official action; (2) the risk of an erroneous deprivation of such interest through the procedures used, and the probable value, if any, of additional or substitute procedural safeguards; and (3) the government's interest. See Mathews v. Eldridge, 424 U.S. at 335, 96 S.Ct. 893; Gilbert v. Homar, 520 U.S. at 924, 117 S.Ct. 1807.

949

In bond validation proceedings, the Legislature has provided that a copy of the bond validation complaint and the court's order to show cause why the complaint should not be granted and the bonds validated must be served on the state attorney in the circuit where the proceeding is pending. See § 75.05(1), Fla. Stat. (2000). The clerk of the court is also required to publish a copy of the order for two consecutive weeks at least twenty days before the hearing in a newspaper of the county where the complaint is filed. See § 75.06(1), Fla. Stat. (2000). "By this publication all property owners, taxpayers, citizens, and others having or claiming any right, title or interest in the county, municipality, or district, or the taxable property therein, are made parties defendant to the action and the court has jurisdiction of them to the same extent as if named as defendants in the complaint and personally served with process." *Id.* Thus, the Legislature has authorized constructive notice of property owners or other interested parties in bond validation proceedings.

Citizens complains that the Authority should have given *actual* notice to each property owner that validation of the mandatory connection ordinance would be considered during the bond validation proceeding. However, in Penn v. Florida Defense Finance & Accounting Service Center Authority, 623 So.2d 459, 462 (Fla. 1993), this Court held that the statutory twenty-day period between publication of notice and the bond validation hearing did not violate the Florida and federal guarantees of due process. Thus, the Court necessarily concluded that such constructive notice by publication is appropriate in bond validation proceedings.

Citizens also complains that the published constructive notice was not satisfactory because there was no mention that the circuit court would consider the validity of the mandatory connection ordinance and also because the notice referenced the wrong case number. However, in Washington Shores Homeowners' Ass'n v. City of Orlando, 602 So.2d

materials and cover all other expenses needed to operate a school.

[8] The State discontinued capital funding, with limited exceptions, after the 2003-2004 school year. See generally § 1013.62(7), Fla. Stat. (2003).

[9] The School Board attached a table to its appeal showing the operational budgets, and deficits, of each charter school in Osceola County between 2002 and 2003.

[10] See § 1002.33(8)(d), Fla. Stat. (2003) (requiring the district to assume control over a failed charter school within the district).

[11] We also note that funding for charter schools can be supplemented by private donations.

[12] See *Recommended Revisions to Florida's Charter School Code, An Annual Report to the Legislature, Governor and Secretary of Education* 8 (Dec. 18, 2002).

[13] See 2003-393 Laws of Florida.

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SCHOOL BOARD OF VOLUSIA COUNTY, Appellant,
v.
ACADEMIES OF EXCELLENCE, INC., etc., et al., Appellee.

No. 5D06-1054.

District Court of Appeal of Florida, Fifth District.

February 22, 2008.

1187 *1187 Theodore R. Doran, Audrie M. Harris and Michael Ciocchetti of Doran, Wolfe, Ansay & Kundid, Daytona Beach, for Appellant.

Christopher V. Carlyle, Shannon McLin Carlyle and Gilbert S. Goshorn, Jr., of The Carlyle Appellate Law Firm, The Villages, for Appellee.

ON MOTION FOR REHEARING AND REHEARING EN BANC

PALMER, C.J.

The motion for rehearing and for rehearing en banc filed by the **School Board of Volusia County** is denied. However, the prior opinion of this court, dated November 30, 2007 is withdrawn, and we substitute the following in its place.

The **School Board of Volusia County (School Board)** appeals the final order entered by the State of Florida, Department of Education (**State Board**), reversing the **School Board's** denial of the charter school application filed by **Academies of Excellence, Inc. (Academies)**. Determining that the record contains competent, substantial evidence to support the **State Board's** decision, we affirm.

Academies applied to the **School Board** for permission to open a charter elementary school in **Volusia County, Florida**. Pertinent to this appeal, in the application the following information was set forth:

L. Student Performance Standards

4. To be considered as meeting student performance standards, students must perform at Level 3 and above on the mathematics and reading sections of the Florida Comprehensive Assessment Test.
5. Students who score at or above the 25th percentile on norm-referenced tests are considered to have demonstrated acceptable student performance standards.

Additionally, as part of the finance portion of the application, **Academies** indicated that it expected to initially enroll 450 students.

1188 *1188 The **School Board** held a hearing to consider **Academies'** application. During the hearing, Dr. Chris Colwell, Deputy Superintendent for Instruction Services, testified that **Academies'** application failed to set a goal for itself of attaining an A, B, C, or D grade in terms of success of the **school**. He stated that a specific stated goal was required and appropriate. Next, Colwell took issue with **Academies'** standard that "students who score at or above the 25th percentile on norm referenced tests are considered to have demonstrated acceptable student performance standards." He testified that the standard was lower than the standards held by public schools in **Volusia County** and lower than the standards that would be expected by the State of Florida.

Bill Kelly, Jr., Deputy Superintendent of Finance, opined that **Academies'** application lacked evidence of sound financial planning. Specifically, Kelly found **Academies'** enrollment projection of 450 students in the first year of operation to be unreasonable. Based on the unreasonable enrollment figure, Kelly stated that **Academies'** budget revenues were overstated. Kelly also stated that **Academies** was understating its capital budget by one million dollars for facilities and land costs.

At the conclusion of the hearing, the **School Board** denied **Academies'** application. Specifically, the **School Board** concluded that **Academies'** application failed to meet the standards for minimal acceptance in the areas of student assessment/accountability and finance/class size requirements.

Academies appealed the **School Board's** ruling to the State **Board** of Education. The Charter **School Appeals** Commission^[1] conducted a hearing on the matter. During that hearing, Kathleen Schoenberg, attorney for **Academies**, argued that **Academies'** application properly addressed the statutory requirement regarding student assessment and that the argument over finances was just a difference of opinion between the **School Board** and **Academies**.

Ted Doran, attorney for the **School Board**, argued that **Academies** had failed for the fourth time to produce an application sufficient statutorily to proceed to the next level. Dr. Colwell testified that **Academies'** failure to include a **school** goal in its application made **Academies** unaccountable for its performance under the Governor's A-Plus Plan. Further, Colwell stated that it was unacceptable that **Academies** considered the 25th percentile to be an acceptable level of student performance. However, he did indicate that **Academies** had admitted that this figure on their application was a typographical error and that the figure should have been 51st percentile instead of 25th percentile.

In response, Schoenberg stated that **Academies** mistakenly omitted a sentence stating that the **school's** goal was to be an "A" **school**. However, she argued that omission of that one sentence was not enough to make the entire application deficient.

The Commission asked the parties whether there was a specific requirement that a **school** grade be part of the application. Colwell admitted that the application template did not include such a requirement and Schoenberg stated that the statute does not require the **school** to include a **school** grade as one of its goals.

1189 At the conclusion of the comments on student assessment/accountability, the *1189 Commission voted that the **School Board** had competent, substantial evidence to support its finding that the application was statutorily deficient in the area of student assessment/accountability. However, immediately thereafter, the Commission voted that the **School Board's** finding that the application was statutorily deficient in the area of student assessment/accountability was not good cause for denial.^[2] After more discussion, the Commission voted that the **School Board** did not have competent substantial evidence to support its finding that the application was statutorily deficient in the areas of finance/class size requirements. Subsequently, the Commission voted to recommend to the **State Board** that **Academies'** appeal be granted.

The Commission's recommendations were submitted to the **State Board**. The **State Board** conducted a hearing during which it considered whether to accept the Commission's recommendation to overturn the decision of the **School Board** and to grant **Academies'** application. During the hearing, a member of the **State Board** requested clarification regarding the 25th percentile versus the 51st percentile. The head of the appeals commission responded:

I absolutely admonished the applicant that that's not acceptable. They had noted it. They admitted it. They said it was a typo. They absolutely agree on the record and in writing, it should be 51 percent which is the norm for the FCAT.

Subsequently, the **State Board** issued a written order upholding the findings and recommendations of the Commission. This appeal timely followed.

The **School Board** challenges the **State Board's** final order, claiming first that the **Board** deviated from the record below and improperly created its own record during the appeal process. Specifically, the **School Board** argues that the **School**

Board and Academies were bound by the record developed before the **School Board** and thus it was error for the parties to add new evidence during the appeal process. We reject this argument because both the **School Board** and **Academies** presented, without any objection, testimony before the Commission regarding the issues of student assessment/accountability and finance/class size requirements. Additionally, the **School Board** did not raise any objections to the comments made during the State **Board** meeting regarding the 25th percentile promotion rate, nor did the **School Board** raise the argument before the State **Board** that it now raises on appeal. Accordingly, the **School Board** failed to preserve this issue for our review.

1190 In a related argument, the **School Board** claims that the State **Board** improperly conducted a *de novo* review of the evidence *1190 by accepting testimony at the State **Board** hearing. Again, this argument was not properly preserved for our review.

The **School Board** further argues that the State **Board's** order must be reversed because it fails to include a fact-based justification for the **Board's** decision. We disagree.

Section 1002.33(6)(e)1. & 5. of the Florida Statutes (2005) provides:

1002.33. Charter schools

(6) Application process and review.

Beginning September 1, 2003, applications are subject to the following requirements:

(e) 1. A Charter **School** Appeal Commission is established to assist the commissioner and the State **Board** of Education with a fair and impartial review of appeals by applicants whose charter applications have been denied, whose charter contracts have not been renewed, or . . .

5. Commission members shall thoroughly review the materials presented to them from the appellant and the sponsor. The commission may request information to clarify the documentation presented to it. In the course of its review, the commission may facilitate the postponement of an appeal in those cases where additional time and communication may negate the need for a formal appeal and both parties agree, in writing, to postpone the appeal to the State **Board** of Education. A new date certain for the appeal shall then be set based upon the rules and procedures of the State **Board** of Education. Commission members shall provide a written recommendation to the state **board** as to whether the appeal should be upheld or denied. A fact-based justification for the recommendation must be included. The chair must ensure that the written recommendation is submitted to the State **Board** of Education members no later than 7 calendar days prior to the date on which the appeal is to be heard. Both parties in the case shall also be provided a copy of the recommendation.

§ 1002.33(6)(e)1. & 5., Fla. Stat. (2005)(emphasis added). The statute clearly states that the Commission, not the State **Board**, must include a fact-based justification for its recommendation. Therefore, the failure of the State **Board** to include a fact-based justification for its decision does not constitute reversible error.^[3]

The **School Board** next challenges the State **Board's** final order, claiming that the **School Board's** basis for denying **Academies'** charter school application constituted good cause because **Academies'** application was unsound in student assessment/accountability and finance/class size requirements. The **School Board** claims that, because the Commission found that **Academies'** application was statutorily deficient in the area of student assessment/accountability, the Commission erred in concluding that this deficiency was not good cause for denial of **Academies'** application. We disagree.

1191 *1191 While **Academies** admitted at the hearing before the Commission that it had mistakenly omitted a sentence from its application that should have said the **school's** goal was to be an "A" **school**, a representative from the **School Board** also admitted that the application template did not include a requirement that one of the goals include a **school grade**. Section 1002.33(6)(a) of the Florida Statutes also contains no such requirement, and the Florida charter schools standard application includes no such requirement. Therefore, competent substantial evidence supports the Commission's conclusion that the **School Board** did not have good cause to deny **Academies'** application on that basis.

Next, the **School Board** argues that the Commission erred in concluding that the **School Board** did not have good cause to deny **Academies'** application based on statutory deficiencies in **Academies'** basis for promotion of students. Specifically, the **School Board** argues that **Academies'** could not promote students based on reaching the 25th percentile. This issue was extensively discussed at the meeting before the Commission. **Academies** indicated that it was willing to correct this language. **Academies'** willingness to rectify the situation appeared to be the reason that the Commission concluded that this error on **Academies'** application was not good cause to deny the application. Based on the testimony and argument presented at the hearing, the Commission had sufficient evidence before it to properly conclude that, although **Academies'** application was statutorily deficient, such a deficiency was not good cause for denial of the application when **Academies** recognized the problem and was willing to correct it.

The **School Board** also argues that the Commission erred in concluding that the **School Board** did not have competent substantial evidence to support its finding that **Academies'** application was statutorily deficient in the area of finance/class size requirement. We again disagree. The record demonstrates that **Academies** rebutted the reasons the **School Board** gave for denying its application, and the evidence demonstrated that many of the **School Board's** reasons for denial were based on opinion. Also, a **School Board** representative admitted that **Academies'** budget was correct if it could achieve its estimated enrollment number.

Finally, the **School Board** challenges the State Board's final order, claiming that the order which was entered pursuant to section 1002.33 of the Florida Statutes conflicts with, and thereby violates, the **School Board's** constitutional authority under Article IX, section 4(b), of the Florida Constitution, to operate, control and supervise public schools, and its authority under Article IX, section 1(a), of the Florida Constitution, to make adequate provision for a uniform and high quality system of free public schools. Specifically, the **School Board** argues that, because the act of operating and controlling all free public schools in **Volusia County** is conferred exclusively on the **School Board**, section 1002.33(6)(c) is unconstitutional because it permits the State Board to open a charter **school**.

Section 1002.33(6)(c) of the Florida Statutes provides:

1002.33 Charter Schools

(6) Application process and review. — Beginning September 1, 2003, applications are subject to the following requirements:

(c) An applicant may appeal any denial of that applicant's application or failure to act on an application to the State Board of Education no later than 30 calendar days after receipt of the district *1192 **school board's** decision or failure to act and shall notify the district **school board** of its appeal. Any response of the district **school board** shall be submitted to the State Board of Education within 30 calendar days after notification of the appeal. Upon receipt of notification from the State Board of Education that a charter **school** applicant is filing an appeal, the Commissioner of Education shall convene a meeting of the Charter **School** Appeal Commission to study and make recommendations to the State Board of Education regarding its pending decision about the appeal. The commission shall forward its recommendation to the state board no later than 7 calendar days prior to the date on which the appeal is to be heard. The State Board of Education shall by majority vote accept or reject the decision of the

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district **school board** no later than 90 calendar days after an appeal is filed in accordance with State **Board of Education** rule. The Charter **School Appeal Commission** may reject an appeal submission for failure to comply with procedural rules governing the appeals process. The rejection shall describe the submission errors. The appellant may have up to 15 calendar days from notice of rejection to resubmit an appeal that meets requirements of State **Board of Education** rule. An application for appeal submitted subsequent to such rejection shall be considered timely if the original appeal was filed within 30 calendar days after receipt of notice of the specific reasons for the district **school board's** denial of the charter application. The State **Board of Education** shall remand the application to the district **school board** with its written decision that the district **school board** approve or deny the application. The district **school board** shall implement the decision of the State **Board of Education**. The decision of the State **Board of Education** is not subject to the provisions of the Administrative Procedure Act, chapter 120.

§ 1002.33(6)(c), Fla. Stat. (2005).

Article IX, Section 1(a) of the Florida Constitution provides:

§ 1. Public education

(a) The education of children is a fundamental value of the people of the State of Florida. It is, therefore, a paramount duty of the state to make adequate provision for the education of all children residing within its borders. Adequate provision shall be made by law for a uniform, efficient, safe, secure, and high quality system of free public schools that allows students to obtain a high quality education and for the establishment, maintenance, and operation of institutions of higher learning and other public education programs that the needs of the people require. . . .

Article IX, section 4(b) of the Florida Constitution provides:

§ 4. School districts; school boards

(b) The **school board** shall operate, control and supervise all free public schools within the **school** district and determine the rate of **school** district taxes within the limits prescribed herein. Two or more **school** districts may operate and finance joint educational programs.

Article IX, section 2 of the Florida Constitution provides:

§ 2. State board of education

The state **board** of education shall be a body corporate and have such supervision of the system of free public education as is provided by law. The state **board** of education shall consist of seven members appointed by the governor to staggered 4-year terms, subject to confirmation by the senate. The state **board** of education shall appoint the commissioner of education.

1193 *1193 Section 1002.33(6)(c) does not permit the State **Board** to open a charter **school**. Rather, the statute permits the State **Board** to approve or deny a charter application after it completes an extensive review process. Granting a charter application is not equivalent to opening a public **school**. The approval of an application is just the beginning of the process to open a charter **school**. Once the charter application has been granted, the **school board** still has control over the process because the applicant and the **school board** must agree on the provisions of the charter. See § 1002.33(6) (h), Fla. Stat. (2005). A **school board** can also cause a charter to be revoked or not renewed. See § 1002.33(8), Fla. Stat. (2005). Furthermore, under the Constitution of Florida, while the **school board** shall operate, control and supervise all free public schools within their district the State **Board** of Education has supervision over the system of free public education as provided by law.

AFFIRMED.

SAWAYA, J., concurs.

GRIFFIN, J., concurs specially, with opinion.

GRIFFIN, J., concurring specially.

For what it is worth, in my view, the **School Board** acted appropriately in denying the application. This was the fourth time that **Academies** had submitted its application for this charter school. In the previous application, the minimum standard **Academies** identified for assessment of the school itself was not to receive an "F" from the State's grading system for two consecutive years. The **County** found such a standard unacceptable so, in this fourth application, **Academies** simply eliminated any measure for the school. As for the 25th percentile threshold for individual student evaluation, the application says that it would be acceptable if students scored at or above the 25th percentile on norm reference tests. This is clearly not an acceptable standard for several reasons that were discussed in the hearing. **Academies'** response was that their standard *appeared* to be unacceptable due to an inadvertently omitted sentence and poor wording, but in fact, they intended to have a standard that would not be unacceptable. The **Board** concluded that it could only act on the application that had been submitted, not the application that might be submitted if errors were corrected, and accordingly denied the application. Surely, they could not have approved the application in its current form.

Few things in the administrative process are more destructive than the belief on the part of the applicant and the decision-maker that the "review" of administrative action is really nothing more than a "do-over" with more receptive listeners. A fact-finder and decision-maker who knows its decisions will not be accorded respect is less inclined to worry over their accuracy. Nevertheless, for reasons best known to others, this is apparently the way this process has been designed to operate. Therefore, I concur in the result.

[1] Upon receipt of notification from the State **Board** of Education that a charter school applicant is filing an appeal, the Commissioner of Education shall convene a meeting of the Charter **School** Appeal Commission to study and make recommendations to the State **Board** of Education regarding its pending decision about the appeal. § 1002.33(6)(c), Fla. Stat. (2005).

[2] Section 1002.33(6)(b)3 of the Florida Statutes provides:

1002.33 Charter Schools

(6) Application process and review. — Beginning September 1, 2003, applications are subject to the following requirements:

[b] 3. A district school board shall by a majority vote approve or deny an application no later than 60 calendar days after the application is received, unless the district school board and the applicant mutually agree to temporarily postpone the vote to a specific date, at which time the district school board shall by a majority vote approve or deny the application. If the district school board fails to act on the application, an applicant may appeal to the State **Board** of Education as provided in paragraph (c). If an application is denied, the district school board shall, within 10 calendar days, articulate in writing the specific reasons based upon good cause supporting its denial of the charter application.

§ 1002.33(6)(b)3, Fla. Stat. (2005) (emphasis added).

[3] To the extent the **School Board** argues that the Commission's order is insufficient for failure to include detailed factual findings, the **School Board** failed to preserve this argument because it failed to raise the insufficiency of the Commission's recommendations before the State **Board**. See *Imhotep-Nguzo Saba Charter School v. Department of Educ.*, 947 So.2d 1279 (Fla. 4th DCA 2007) (holding appellate court would not consider issue raised by charter schools for first time on appeal).

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Exhibit 9.	High Performing Letter
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FLORIDA DEPARTMENT OF EDUCATION



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July 29, 2011

Ms. Andreina Figueroa, Board Chair
c/o Michael Diaz de la Portilla
Somerset Academy Middle Charter School (06-5151)
6340 Sunset Drive
Miami, Florida 33413

Dear Ms. Figueroa:

This letter serves as notification that the Department of Education has verified that Somerset Academy Middle Charter School (06-5151) currently meets the criteria for high-performing charter school status pursuant to s. 1002.331, F.S.

If you have any questions, please contact the Office of Independent Education and Parental Choice at (850) 245-0502, or via e-mail at charterschools@fldoe.org.

Thank you for your continued participation in our mission to improve the quality of educational options for Florida's students.

Sincerely,

Handwritten signature of John L. Winn in cursive script.

John L. Winn

Cc: Mr. Donnie Carter, Superintendent
Ms. Jody Perry, Charter School Liaison