

FLORIDA DEPARTMENT OF EDUCATION
CHARTER SCHOOL APPEAL

**Somerset Academy Inc., for the application for
Somerset Academy Middle School Vero Beach,**

Applicant/Appellant.

v.

The School Board of Indian River County, Florida

School Board/Appellee.

**SCHOOL BOARD'S RESPONSE TO NOTICE OF APPEAL OF DENIAL OF CHARTER
SCHOOL APPLICATION SUBMITTED BY SOMERSET ACADEMY, INC. FOR
SOMERSET ACADEMY MIDDLE SCHOOL VERO BEACH**

Receipt of Notice of Appeal: November 20, 2015.

I. Preliminary Statement. The School Board of Indian River County, Florida (School Board) pursuant to §1002.33, Florida Statutes, hereby responds to the Notice of Appeal from the denial of a charter school application submitted by Appellant, Somerset Academy, Inc., for the Somerset Academy Middle School Vero Beach Charter School (Somerset). References to the Record set out in the Appendix to this Response are shown by "App" followed by the tab number and page number. References to Appellant's exhibits to its Notice of Appeal are shown by "Somerset" followed by the tab number and page number.

II. Procedural Background and Jurisdiction. Contrary to the representation made in the appeal, Somerset submitted its application to replicate a high performing charter school on August 3, 2015. (Somerset 5:1;App 10). In order to be considered a replication of a high performing charter school, the proposed charter school must be "substantially similar to at least one of the applicant's high performing charter schools." §1002.33(6)(b) 3.b., Florida Statutes. School Board staff immediately began its work to establish a sixty day timeline and analyze the application. (Somerset 5:1).

Dr. Michael Ferrentino, the School Board staff member responsible for the coordination of the application review, provided initial applicant interview dates to Somerset. (App 1). However, in its appeal Somerset misrepresents the initial timeline prepared by Dr. Ferrentino. Dr. Ferrentino's initial application review timeline provides for the School Board to take action on the application on September 22, 2015, within the sixty day review period established by law. (App 2). On the eve of the scheduled Somerset interview, Somerset inquired if the meeting would be cancelled due to the possibility of Tropical Storm Erika making landfall. (App 3:4). Out of an abundance of caution, Dr. Ferrentino felt it would be safer for the Somerset representatives not to travel through tropical storm weather, and rescheduled the interviews. (App 3:4).

Somerset thereafter indicated by email it was appreciative of Dr. Ferrentino's consideration

(App 3:4), and it is disingenuous for Somerset's appeal to now say such scheduling change was "unilateral" and not agreed to by Somerset. If Somerset representatives really wanted to drive through the tropical storm weather, they should have made that desire known at the time, instead of thanking Dr. Ferrentino for his consideration. When Somerset thereafter requested a schedule change, Dr. Ferrentino was pleased to accommodate it. (App 3:4), and by email dated August 31, 2015, specifically requested that Somerset approve the revised schedule which shows the School Board taking action on the application on October 6, 2015. (App 3:1). With the delay caused by the tropical storm and the schedule change requested by Somerset, it was no longer possible for School Board staff to accomplish the detailed application review work within the original sixty day window; that is why Dr. Ferrentino requested Somerset approve a revised schedule. Rather than responding to Dr. Ferrentino's request, Somerset again requested to postpone the interview date. (App 4:1). Again, Dr. Ferrentino was accommodating, and postponed the interview to the date requested by Somerset. (App 4:1). In that same email, Dr. Ferrentino again requested Somerset "review and consent" to the revised schedule which shows the School Board taking action on the application on October 13, 2015. (App 4:1;6).

In response to Dr. Ferrentino's request for "review and consent" to the schedule, which included School Board action on the application on October 13, 2015, Somerset's response was "This is great. Thank you very much and we look forward to the 15th". (App 5:1). Dr. Ferrentino then sent an email to Somerset representatives confirming the "revised schedule will work for both parties." (App 5:1). At no time did Somerset respond to Dr. Ferrentino's September 1, 2015 email that it objected to any of the schedules or that Dr. Ferrentino was mistaken regarding Somerset's consent to a postponement of the School Board's meeting until October 13, 2015. Rather, Somerset affirmatively consented to the application timeline submitted by Dr. Ferrentino, and even attended and participated in the October 13, 2015 School Board meeting without voicing any

objection to the timing of the meeting.

Stating in their appeal that Somerset never agreed to postpone the School Board's decision on their application completely misrepresents the communications between the parties, and should be wholly disregarded by the State Board of Education. This fabricated argument by Somerset is not worthy of any consideration and must be immediately denied.

III. School Board's Basis for Denial of Application. School Board staff conducted a thorough review of the application and completed the state adopted Application Evaluation Instrument for high performing replications. (Somerset 2). While the Application Evaluation Instrument noted several concerns, the School Board based its denial of the application on four specific issues: replication, civil rights requirements, financial management practices, and education plan.

A. Replication. Section 1002.33(6)(b)3.b.(III), Florida Statutes, requires a replication charter application to substantially replicate the educational program of one of the applicant's high performing charter schools. The application submitted by Somerset did not substantially replicate the educational program of a Somerset high performing charter school, and therefore fails to meet the statutory requirement.

In order to be considered "substantially similar" within the meaning of the above referenced statute, a charter application "must have the same characteristics and be alike in substance or essentials to the school it is replicating." *School Board of Seminole County v. Renaissance Charter School, Inc.*, 113 So.3d 72 (Fla. 5th DCA 2013); *School Board of Polk County v. Renaissance Charter School, Inc.*, 147 So.3d 1026 (Fla. 2^d DCA 2014). In the *Seminole School Board* case, a charter school was attempting to replicate a 6-8 middle school as a K-8 school. In that case, the Court agreed with the Seminole School Board that substantial differences in the curriculum, discipline, student management and teaching focus,

were enough to reject the charter school replication application. *Seminole School Board*, 113 So.3d at 75. In the instant case, the School Board denial of the charter application was based on the failure of the proposed charter school to substantially replicate the educational program of Somerset Academy Charter Middle School South Miami (SoMi). (Somerset 2). Rather than detailing the educational program of SoMi, the application instead discusses implementing the educational program of the Indian River School Board. The application states it will implement the School Board's student progression plan, approved instructional materials, curriculum, curriculum pacing guides, code of student conduct, and digital classroom plan. (App 11: 30;32)*1. By implementing the School Board's educational plan, not SoMi's educational plan, Somerset has failed to provide a replication charter application. The application does not substantially replicate SoMi, a charter school located in south Miami, but instead proposes to replicate the curriculum, discipline, student management, and teaching focus used in the School Board's traditional public schools, which the Appellate Court in the *Seminole School Board* case indicates is not "substantially similar" as required by statute.

Somerset's appeal asserts that adopting "the local jurisdiction's policies and /or State-adopted programs in order for the school to more adequately serve the local population...IS a direct replication." This statement by Somerset contradicts the above statutory and Court definitions of replication.

Somerset's appeal declares that a replication application "is not a carbon copy, nor should it be." That argument was made unsuccessfully in the *Seminole School Board* case. *Id.* Additionally, Somerset's appeal declares it is replicating its model, core values and beliefs, common expectations, and techniques and strategies. This argument has also been made before and rejected. In the *Polk School Board* case which also involved a charter school

¹* The charter application submitted with Somerset's appeal is missing 50% of the pages. Accordingly, a complete copy of the application is provided in the Appendix.

attempting to replicate a 6-8 middle school as a K-8 school, the charter school argued it was replicating "our method and model." *Polk School Board*, 147 So.3d at 1027. The Appellate Court did not agree with that argument and held the replication application failed to substantially replicate the applicant's high performing charter school. *Id.* at 1028. Further, in the *Seminole School Board* case, the charter school argued it was replicating a "substantially similar instruction model" which did not persuade the Appellate Court that it was a substantial replication of the educational program. *Seminole School Board*, 113 So.3d at 75.

Based on the above, the School Board was presented with clear and convincing evidence that the replication application failed to replicate the educational program of SoMi, which is a statutory basis to deny the application. Accordingly, the Somerset appeal must be denied.

B. Civil Rights Requirements - Desegregation. Section 1002.33(6)(b)3.b(II), Florida Statutes, requires the replication charter application to materially comply with all applicable civil rights requirements. The application submitted by Somerset did not comply with the federal desegregation obligations governing Indian River County, and therefore fails to meet the statutory requirement.

The School Board is governed by a federal desegregation order dating from 1965. (App 6). A copy of the most recent Court order dated May 23, 1994 was provided to Somerset. (Somerset 2). The federal desegregation order requires the School Board to achieve certain African American percentages with regard to its student population as well as employees. (Somerset 2). While the application states the charter school will be open to all students in Indian River County, the application only addresses the racial/ethnic population of 2 middle schools. (App 11:19). Further, no specific targeted population is identified in the application to determine whether the charter can meet the requirements of the desegregation order.

The student recruitment plan denoted in the application will not recruit a population to the school reflective of the county's African American student population and will therefore not comply with the desegregation order. (App 11:17;122). The student recruitment plan fails to address the type of student transportation needed and does not discuss affirmative recruitment of African American students. Likewise, the application fails to contain any information for recruitment of African American employees, consistent with the desegregation order requirements. These failures in the application were never addressed by Somerset during the September 15, 2015 interview or the October 13, 2015 School Board meeting. The only response from Somerset seems to be "don't worry, we'll comply." This cavalier approach to a very important issue was concerning to the School Board and School Board staff.

In its appeal, Somerset ridicules the School Board for taking its federal desegregation obligations seriously and for pointing out flaws in Somerset's application on that point. The appeal describes at length other alleged examples of Somerset's involvement in desegregation matters. If this information was pertinent to Somerset's application, it is puzzling why Somerset did not include a description of its desegregation expertise in its application. Incredulously, Somerset actually argues in its appeal the School Board has misinterpreted the desegregation order and that the percentages set out in the desegregation order apply to all minorities, not African American students and staff. Even a cursory review of this case by Somerset would show since 1964 when the matter was initially filed, the case has always been about African American students and staff. (App 6:5; 8-10 and App 7). This uninformed argument is additional clear and convincing evidence Somerset is completely ignorant of the federal desegregation obligations in Indian River County and cannot comply with these obligations.

Somerset's appeal also takes issue with the School Board identifying questionable comments made by a Somerset representative. During the September 15, 2015 interview of

the Somerset representatives, the requirements of the desegregation order were discussed. During that discussion, a Somerset representative clearly stated charter schools were restricted in complying with racial percentages. (Somerset 3:17-22). The interview discussion had to do with the investigation for racial disparity of the companion elementary school to the charter middle school being replicated. A newspaper in 2015 reported 1.1% of SoMi's companion elementary school population was African American while the community's percentage was 17%. Rather than providing a plan for achieving a racial balance at SoMi, or its companion elementary school, Somerset went into great detail why it could not comply, blaming it on the "sibling preference" for filling student seats with students who were not African American, and even questioned if the newspaper article was accurate.

First, Florida law is clear in its requirement that charter schools "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," and allows charter schools to limit their enrollment process to target student populations to comply with federal requirements for a racial/ethnic balance. §1002.33(7)(a)8. and (10)(e)4., Florida Statutes. Second, the "sibling preference" allowed in the charter legislation is permissive not mandatory. §1002.33(10)(d), Florida Statutes. If Somerset wanted to rectify the African American student demographic disparity at SoMi, there are options available. Finally, Somerset points out in its appeal the School Board should not rely upon newspaper articles for demographic information for the charter school proposed to be replicated in Indian River. In response, a review of the Survey 2 student membership data for the 2014-2015 school year published by the Florida Department of Education is informative. (App 8). This public information reveals SoMi's student population to be 2% African American, and the student population in the Miami-Dade School District to be 22% African American, an even greater demographic disparity than reported in the newspaper. In fact, historic student

membership data obtained from the Florida Department of Education PK-12 Enrollment EDStats tool shows since the 2011-2012 school year, SoMi has never achieved a racial/ethnic balance reflective of other public schools in the same school district. (App 9).

Due to the failure of the applicant to address the federal desegregation order requirements or otherwise offer a student and employee recruitment plan to address the federal desegregation order requirements, coupled with SoMi's actual African American student demographic disparity, the School Board was presented with clear and convincing evidence that the application did not comply with the desegregation civil rights obligations governing Indian River County, which is a statutory basis to deny the application.

C. Financial Management Practices. Section 1002.33(6)(b)3.b.(l), Florida Statutes, requires a replication charter school application to contain a description of controls that will safeguard finances as described in §1002.33(6)(a)5., Florida Statutes. The application submitted by Somerset does not contain the required safeguards and therefore fails to meet this statutory requirement.

The application reveals an inadequate separation of duties and internal controls. The application provides disbursement vouchers are reviewed and approved by the school principal and the educational service provider (ESP). (App 11:140). Additionally, the application provides 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." (Somerset 11:140). This structure whereby the ESP has the ability to approve the school's vouchers for payment and is also a signatory on the school's checks suggest an inadequate segregation of duties and poor internal controls, as essentially a vendor to Somerset can approve their own invoices and sign their own checks.

In its appeal, the applicant asserts the ESP does not approve its own payments. The

appeal also asserts the ESP "may be assisting with" the review and approval of invoices and signing checks. However, the application states otherwise and the applicant may not revise its application at this late date. If in fact Somerset's financial controls were structured differently, Somerset should have included such information in its application.

Due to the failure of the application contain a description of controls that will safeguard finances as described in section 1002.33(6)(a)5., Florida Statutes, the School Board was presented with clear and convincing evidence that the application failed to provide sufficient financial safeguards, which is a statutory basis to deny the application.

D. Educational Plan. In addition to the issues of material noncompliance stated above, deficiencies in the area of the charter school's educational plan are also noted.

Dual Language. The application fails to meet the statutory requirement for describing the educational foundation of the school and the teaching and learning strategies that will be employed as required by section 1002.33(7)(a)2., Florida Statutes. The mission and vision of the School refers to a dual language program. (App 11:10). However, the programmatic model presented does not meet the definition of a dual language program, but rather a world languages program. As the replicated school (SoMi) is from Miami Dade School District, the Miami Dade School District's description of dual language programs is instructive. The Miami Dade dual language program description is located at the following link:

(<http://bilingual.dadeschools.net/BEWL/programs.asp>), and provides in part:

The Dual Language Program is also known as two-way bilingual education instruction or bilingual immersion. It is a model that combines Developmental Bilingual Education (DBE) for language-minority students and foreign-language immersion for English-proficient students, with the added benefit of peer tutoring, seeks to enable each group to learn the other's vernacular while also meeting high academic standards.

Broadly speaking, dual language programs in Miami-Dade County Schools have developed along parallel paths, one being that of the elementary Bilingual School Organization (BISO) program, and the other

being that of the Extended Foreign Language (EFL) program. Conceptually, the elementary schools following the BISO model have tended to favor program participation by students in the school. The schools following the Extended Foreign Language have developed "school-within-a-school" variations to serve those students who are especially interested in that type of program. Both the BISO and the EFL programs have aimed toward a 60%/40% (English/Spanish) distribution of time between the two languages of instruction.

This description is also supported by research conducted by The Education Alliance out of Brown University and the National Clearinghouse for English Language Learners (NCELA).

However, contrary to the above description, the application state, "The applicant is hopeful that students will develop an understanding of cross-cultural issues and that some will choose to develop their ability to communicate in more than one language by being part of the school's language program which will require one of their electives to be in either Spanish or Mandarin. Students who are required to take intensive courses (i.e. Intensive Reading and/or Intensive Math), will lose the opportunity to select an elective course while ELL students are required to take a second ESOL course." (App 11:54). This refers to 1 class period for 1 semester in a foreign language, far less than the requirements of a dual language program. The application also refers to "bilingual, bi-literate and bi-cultural students" but never refers to curriculum content being addressed. (App.11-25). While Somerset in its appeal states it is insulted by questions about its dual language program, unfortunately Somerset misses the point. A dual language program is a specifically defined program and Somerset's application simply does not describe or meet the requirements for a dual language program. Accordingly, the application fails to accurately describe its educational model (dual language) but is actually describing a world language program.

Further, there is no clear plan of how students' acquired proficiency levels in a second language will be monitored in a school whose mission is to bilingually foster student achievement by providing a technologically innovative, and challenging environment. No

information was provided in the application regarding data reflecting content specific proficiency in the dual language program. During the applicant interview, the only information shared was that students are assessed on their knowledge of their foreign language but not in relation to how proficient they were in the content area. Since the application asserts this is a replication of a dual language program we would expect to see proficiency scores on how students did in their content subjects in their foreign language as well as in English. Without the inclusion of specific data on the rates of levels of bilingualism it was not possible to evaluate and analyze the effectiveness of the proposed replication.

Finally, the application indicates the school will provide, "A robust bilingual and culturally inquisitive curriculum aimed at the mastery of Florida Standards/NGSSS as applicable". (App 11:26). However, the dual language programming does not focus on standards related to proficiency within core content courses.

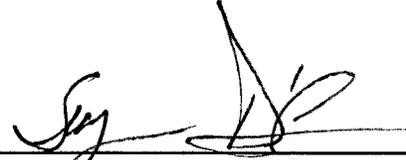
Due to the failure of this charter application to accurately describe a dual language program, the School Board was presented with clear and convincing evidence that the application failed to adequately describe its proposed educational plan, which is a statutory basis to deny the application.

IV. Conclusion

The School Board was presented with clear and convincing evidence that the application failed to meet the statutory requirements for a high performing charter school replication on several issues, and the appeal should therefore be denied. Further the date the School Board took action on the application was agreed to by Somerset, and any attempt by Somerset to assert otherwise must be rejected.

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that on December 17, 2015, a true and correct copy was furnished via FedEx. to: Kathy Schroeder, the Agency Clerk for the Department of Education, 325 West Gaines Street, Room 1520, Tallahassee, Florida 32399-0400; and Collette Papa, Esquire, 6340 Sunset Drive, Miami, Florida 33143.



Suzanne D'Agresta, Esquire
Fla. Bar. No. 47066
Garganese, Weiss & D'Agresta, P.A.
111 N. Orange Ave, Suite 2000
Orlando, Florida 32801
Phone: (407) 425-9566 Fax: (407) 425-9596
Primary e-mail: sdagresta@orlandolaw.net
Attorney for The School Board/Appellee

**APPENDIX TO SCHOOL BOARD'S RESPONSE TO NOTICE OF APPEAL OF DENIAL
OF CHARTER SCHOOL APPLICATION SUBMITTED FOR
SOMERSET ACADEMY MIDDLE SCHOOL VERO BEACH**

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1

Suzanne D'Agresta

From: D'Agresta, Suzanne <Suzanne.D'Agresta@indianriverschools.org>
Sent: Wednesday, August 19, 2015 3:49 PM
To: Suzanne D'Agresta
Subject: FW: Receipt of Applications

From: Ferrentino, Michael
Sent: Tuesday, August 18, 2015 11:49 AM
To: 'Adriana Lima'
Cc: 'dconcepcionflogmail.com'; Ferrentino, Michael
Subject: RE: Receipt of Applications

Good morning Ms. Lima,

Since we truly only have the 60 days this year we are going to have a tight timeframe to work within.

We have scheduled the "Interview" sessions as follows:

Somerset Academy Vero Beach - Monday,
August 31, 2015 1:00 PM - 3:00 PM
Somerset Academy Middle School Vero Beach - Monday, August 31, 2015
3:00 PM - 5:00 PM

Additionally, we have scheduled our "Summary of Findings" sessions as follows:
Somerset Academy Vero Beach - Monday,
September 14, 2015 1:00 PM - 3:00 PM
Somerset Academy Middle School Vero Beach - Monday, September 14, 2015 3:00 PM
- 5:00 PM

I hope representatives from Somerset can attend this important aspect of the review process.

Again, we ask that only Somerset Board and Founding Members, in addition to the current Principals of the Replication schools attend the Interview process.

Location:
School District of Indian River County
Teacher Education Center (TEC)
1990 25th Street
Vero Beach, FL 32960
(772) 564-3000

We are looking forward to seeing you at these meetings.
Thank you,

Michael Ferrentino, Ed.D.

From: Adriana Lima [mailto:alima@academica.org]
Sent: Tuesday, August 18, 2015 11:27 AM

To: Ferrentino, Michael
Subject: Re: Receipt of Applications

Thank you, Dr. Ferrentino.
Please keep me updated on the schedule for interview dates.
Hope you are well.

Adri C. Lima / Academica
305.878.9993/ alima@academica.org<<mailto:alima@academica.org>>

Office: 305.669.2906 / Fax: 305.669.4390
6340 Sunset Drive Miami, FL 33143
[http://cp.mcafee.com/d/k-Kr6wUSyMNUwb8VBATsS--qekhP2pEvdLLCzB4sMUUrvvd7a8VxB4S--qem4QNRPt4d8N-AZ11oDX12F-Ce1FKIjZwxk_j70QSNg2323X_nV4QsFInsoWZOW9EVjoVBUsqeknteEyCJtdmWbfaxVZichs3jqpJUTsTsS031R94unMFSSR3RpmTw09KzoFI8v01EDQz7WjQ5iwxbohAp-db4WRFFM04S--VsSbwaAq80nZLAJcQgltd40wIIvaSPBm53qoUT06er290sn-i](http://cp.mcafee.com/d/avndy0wd3hJ5xyZQmhPb9KVJZYQsEzC4Ph0rvvd7a8VxNMS--qekhP3a9JZYQsI9FzHCW8qhZ9W2GNfS25jZcs3jtoDX12F-Ce1FJzk4647T-L09EVjoKUNRXBQjhOCNPbMUQsELKth5dqWqJQmul3PWApMU6CQjrNKVKVIFSSR3RpmTw09KzoFI8v01EDQz7WjQ5iwxbohAp-db4WRFFM04S--VsSbwaAq80nZLAJcQgltd40wIIvaSPBm53qoUSB0H<<a href=)

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From: <Ferrentino>,
"Michael.Ferrentino@indianriverschools.org"<mailto:Michael.Ferrentino@indianriverschools.org>

<Michael.Ferrentino@indianriverschools.org><mailto:Michael.Ferrentino@indianriverschools.org>

<Michael.Ferrentino@indianriverschools.org><mailto:Michael.Ferrentino@indianriverschools.org>

Date: Wednesday, August 5, 2015 at 1:09 PM

To: **Adri Lima** <alima@academica.org><mailto:alima@academica.org>>

Cc:

"Michael.Ferrentino@indianriverschools.org"<mailto:Michael.Ferrentino@indianriverschools.org>

<Michael.Ferrentino@indianriverschools.org><mailto:Michael.Ferrentino@indianriverschools.org>>

Subject: Receipt of Applications

Good afternoon Ms. Lima,

Just a short email to inform you that we are in receipt of the following applications:

- 1) Friday, July 31, 2015 - Somerset Academy Vero Beach
- 2) Monday, August 3, 2015 - Somerset Academy Middle School Vero Beach

I will be meeting with our Superintendent next Wednesday....after-which I will forward to you an evaluation agenda.

Thank you....Mike

Dr. Michael Ferrentino
Executive Director ESE/SS
School District of Indian River County
1990 25th St.
Vero Beach, FL 32960
(772) 564-5932
Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org> /

2

Charter School Application Timeline-2015-2016

- July 31, 2015 SOMERSET ACADEMY APPLICATION RECEIVED.
- Aug. 3, 2015 SOMERSET ACADEMY MIDDLE APPLICATION RECEIVED.
- Aug. 14, 2015 Initial meeting with selected reviewers. Application forwarded to selected (11-noon, LICR) reviewers for scoring and School Board members (SLC.)
- Aug. 17-21, 2015 Selected reviewers begin working meetings with their staff.
- Aug. 21, 2015 Follow-up meeting with selected reviewers.
(11-noon, LICR)
- Aug. 24-28, 2015 (con't) Selected reviewers - working meetings with their staff.
- Aug. 28, 2015 Follow-up meeting with selected reviewers. Preparatory meeting (following SLC) for Interviews (Public meeting) with Somerset Representatives.
(11-noon, LICR)
- Aug. 31, 2015 District Review Team conducts Interviews (Public Meeting) (1:00 PM, TEC) with Somerset Academy Representatives.
- District Review Team conducts Interviews (Public Meeting) (3:00 PM, TEC) with Somerset Academy Middle Representatives.
- Sept. 4, 2015 Team Meeting to review Interview Question responses.
- Sept. 10, 2015 (noon) Item placeholder on the School Board's 9/22/15 agenda for decision.
- Sept. 11, 2015 Team meeting to prepare responses for Summary of Findings meeting.
- Sept. 14, 2015 District Review Team conducts, "Summary of Findings meeting"
(public meeting) (1:00 pm, TEC) for Somerset Academy Representatives.
- District Review Team conducts, "Summary of Findings meeting"
(public meeting) (3:00 pm, TEC) for Somerset Academy Middle Representatives.
- Sept. 15, 2015 Review Team Recommendations to Superintendent.
Notification to Somerset Representatives of Recommendation to Board.
- Sept. 16-18, 2015 Notification of the Superintendent's recommendation to the School Board.
- Sept. 22, 2015 School Board Meeting.
- Sept. 23-29, 2015 Formal notification of Award or Denial after School Board meeting for Somerset Academy.
Formal notification to State of Florida of the status on the application.
- Sept. 29, 2015 Day 60 for Somerset Academy
- Oct. 3, 2015 Day 60 for Somerset Academy Middle

3

Suzanne D'Agresta

From: D'Agresta, Suzanne <Suzanne.D'Agresta@indianriverschools.org>
Sent: Tuesday, September 01, 2015 2:09 PM
To: Suzanne D'Agresta
Subject: FW: Reminder for Interview dates
Attachments: 2015 August 1st Timeline Somerset & Somerset Middle Application- Revised due to Storm.docx

From: Ferrentino, Michael
Sent: Monday, August 31, 2015 2:28 PM
To: 'Adriana Lima'
Cc: Ferrentino, Michael
Subject: RE: Reminder for Interview dates

Hi Ms. Lima,

I trust that you fared well and that the flooding wasn't as bad as it was here in Indian River County. We have worked through another time frame for our meeting dates.

I would like to propose conducting the interviews on the afternoon of Thursday, September 10, 2015 as follows:

Somerset Academy Elementary Vero to Thursday, September 10, 2015 @ 1:30 AM - 3:00 PM
Somerset Academy Middle Vero to Thursday, September 10, 2015 @ 3:30 PM - 5:00 PM

I have enclosed an attached revised schedule for your review and approval.

Thank you,
Michael Ferrentino

From: Adriana Lima [mailto:alima@academica.org]
Sent: Friday, August 28, 2015 3:31 PM
To: Ferrentino, Michael
Subject: Re: Reminder for Interview dates

That is no problem. Thank you so much!

Adri C. Lima / Academica
305.878.9993 / [http://cp.mcafee.com/d/k-Kr41ASyMMyyPsQsLI6XCTTPh0yeojd79JZYQsEzC773rXVEVh7ccECTTPhOMCCeKrExF6fQDEaH4_o81fQNMddRyvI4aDwoU6CSb6zDT_vvW_cIf3xR-LsKDuWf3DT7TNTbnhIyyHtdzBgY-F61K1FJcSDsTsTsS02SSEuHaSY01dQr5dx3-gd4-Ao_iuwGk49r2czfNFoDmFZe00CSn4nD3oK0GhEw1vG0wxYjh0Xm9Ew3oj-9Cn3h0xI_ErpjdPZVES4T](http://cp.mcafee.com/d/2DRPowcy0A96Qm64kmrCzBZwTs--qekhp2pEVdLLCzB4sMUUrvvd7a8VxB4S--qem4QNRpt4d8N-AZ1loDX12F-Ce1FKIjZwxk_j70QsNoQs--_XX_nVBxUseLRXBQXThUs-U--eVqWdAk1rFIsG7DR80JMddECQXCXCXCODrrkf1Bru00CWdyCMx_86yvicvFfgla24Jx6hDUQIjHk-D00jrbybPxIn0l8Qg0LRpgg-9Ewth4Qg1I9_4PbP1EwgSvQdIFCNmclHKhuekBP<<a href=)

On Aug 28, 2015, at 3:30 PM, Ferrentino, Michael
<Michael.Ferrentino@indianriverschools.orgmailto:Michael.Ferrentino@indianriverschools.org>> wrote:
I will work on that....
May not get back to you until Monday or Tuesday if that is ok?
Thanks....Mike

From: Adriana Lima [mailto:alima@academica.org]

Sent: Friday, August 28, 2015 2:20 PM

To: Ferrentino, Michael;

'dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>'

Cc: Alderman, Donna; Berg, Deborah; Blanco, Alice; Chesnut, Patricia; D'Agresta, Suzanne; Francis, Kathrine; Fritz, William; Green, Bruce; Hayes, Christina; Long, Deborah; Malits, Karen; McCarty, Patrick; Morrison, Carter; Robison, Jamie; Rynberg, Andrew; Suit, Edwina; Taylor, Christopher; Torres-Martinez, Lillian

Subject: Re: Reminder for Interview dates

Dr. Ferrentino and review team members,
Thank you for your email and consideration.
Somerset Academy, Inc. has a scheduled board meeting on September 11th. Are there any other dates in September that work for you? If not, I will work with the board to see if they can reschedule their meeting.

Thank you very much. Take care and be safe!

Adri C. Lima / Academica
305.878.9993/ alima@academica.org<mailto:alima@academica.org>

Office: 305.669.2906 / Fax: 305.669.4390

6340 Sunset Drive Miami, FL 33143

<http://cp.mcafee.com/d/avndxMwrhoohhpKqenS3tPrXVEVh7c9CzAS-->

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From: <Ferrentino>,
"Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianrivers
chools.org>"
<Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianrivers
chools.org>>
Date: Friday, August 28, 2015 at 1:54 PM
To: Adri Lima <alima@academica.org<mailto:alima@academica.org>>,
"'dconcepcionfl@gmail.com<mailto:'dconcepcionfl@gmail.com>'"
<dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>>
Cc: "Alderman, Donna"
<Donna.Alderman@indianriverschools.org<mailto:Donna.Alderman@indianriverschools.o
rg>>, "Berg, Deborah"
<Deborah.Berg@indianriverschools.org<mailto:Deborah.Berg@indianriverschools.org>>
, "Blanco, Alice"
<Alice.Blanco@indianriverschools.org<mailto:Alice.Blanco@indianriverschools.org>>
, "Chesnut, Patricia"
<Patricia.Chesnut@indianriverschools.org<mailto:Patricia.Chesnut@indianriverschoo
ls.org>>, "D'Agresta, Suzanne"
<Suzanne.D'Agresta@indianriverschools.org<mailto:Suzanne.D'Agresta@indianriversch
ools.org>>,
"Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianrivers
chools.org>"
<Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianrivers
chools.org>>, "Francis, Kathrine"
<Kathrine.Francis@indianriverschools.org<mailto:Kathrine.Francis@indianriverschoo
ls.org>>, "Fritz, William"
<William.Fritz@indianriverschools.org<mailto:William.Fritz@indianriverschools.org
>>, "Green, Bruce"
<Bruce.Green@indianriverschools.org<mailto:Bruce.Green@indianriverschools.org>>,
"Hayes, Christina"
<Christina.Hayes@indianriverschools.org<mailto:Christina.Hayes@indianriverschools
.org>>, "Long, Deborah"

<Deborah.Long@indianriverschools.org<mailto:Deborah.Long@indianriverschools.org>>
, "Malits, Karen"
<Karen.Malits@indianriverschools.org<mailto:Karen.Malits@indianriverschools.org>>
, "McCarty, Patrick"
<Patrick.Mccarty@indianriverschools.org<mailto:Patrick.Mccarty@indianriverschools.org>>, "Morrison, Carter"
<Carter.Morrison@indianriverschools.org<mailto:Carter.Morrison@indianriverschools.org>>, "Robison, Jamie"
<Jamie.Robison@indianriverschools.org<mailto:Jamie.Robison@indianriverschools.org>>, "Rynberg, Andrew"
<Andrew.Rynberg@indianriverschools.org<mailto:Andrew.Rynberg@indianriverschools.org>>, "Suit, Edwina"
<Edwina.Suit@indianriverschools.org<mailto:Edwina.Suit@indianriverschools.org>>, "Taylor, Christopher"
<Christopher.Taylor@indianriverschools.org<mailto:Christopher.Taylor@indianriverschools.org>>, "Torres-Martinez, Lillian"
<Lillian.TorresMartinez@indianriverschools.org<mailto:Lillian.TorresMartinez@indianriverschools.org>>
Subject: RE: Reminder for Interview dates

Hello Ms. Lima and Mr. Concepcion...

I met with the various review team members this morning in regards to the storm and our meeting schedule.

Although at present, the superintendent is anticipating school to be open for business on Monday. However, all team members felt that considering that we are requesting you to come from our south counties, it is unfair, and probably unsafe, to have you drive through rain and wind even if it only remains a Tropical Storm. Thus, we have rescheduled the interviews as follows:

From Monday, August 31, 2015 @ 1:00 - 2:30 PM for Somerset Academy Elementary Vero to Friday, September 11, 2015 @ 10:30 AM - 12 noon

Lunch 12 noon-1:00 PM From Monday, August 31, 2015 @ 2:30 - 5:00 PM for Somerset Academy Middle Vero to Friday, September 11, 2015 @ 1:00 PM - 2:30 PM

Thank you...be safe...

Mike Ferrentino

From: Adriana Lima [<mailto:alima@academica.org>]
Sent: Thursday, August 27, 2015 2:11 PM
To: Ferrentino, Michael
Subject: Re: Reminder for Interview dates

Good Afternoon Dr. Ferrentino

I hope you are doing well.

The team is set to go up on Monday. In the event the Tropical Storm/Hurricane is set to come this way, will you let me know prior to Monday morning if we will reschedule?

Looking forward to hearing from you.

Thanks

Adri C. Lima / Academica
305.878.9993/ alima@academica.org<<mailto:alima@academica.org>>

Office: 305.669.2906 / Fax: 305.669.4390
6340 Sunset Drive Miami, FL 33143
[http://cp.mcafee.com/d/avndz8wd39J5xx55CVEVvodTdLLCzB4sMCqejrXVEVh7cee6TTPhOyeophdLLCzBxdctsTh3icvFfglm9-MgGvFzwqrH4_o8lfQNMddImd7fL--_R-pou73HZuVteZQu7fKfLzKmKzp55mWr7axVZicHs3jq9JeVKVKVIFSSR3RpmTw09KzoFI8v01EDQz7WjQ5iwxbohAp-db4WRFFM04SOUyYUr5M5id40bZmk4fyq87qNd40r2vNcOYMq84dDZ3rapL4wCFLtu<\[\\[\\[http://cp.mcafee.com/d/k-Kr6h8g41ASyMMyyPsQsLI6XCTTPhOyeojd79JZYQsEzC773rXVEVh7ccECTTPhOMCCeKrExF6fQDEaH4_o8lfQNMddRyvI4aDwoU6CSb6zDT_vvW_cIf3xR-LsKDuWf3DT7TNTbnhIyyHtdzBgY-F61K1FJ5ASDsTsTsS03pEJIiJe1KkAhxISU_ABT8_jalJbjYtSTAaRaYJ0yrESar27Ywq9Z8N-AZ1kE8iS4p6vziNeJjWs01dIK8Le6Ns1kzh02_1B13UCy1SIjh06MDYjcLc6y13p_gSOcr0W89Cw8C\\\]<\\\[http://cp.mcafee.com/d/avndyhJ5xx55CVEVvodTdLLCzB4sMCqejrXVEVh7cee6TTPhOyeophdLLCzBxdctsTh3icvFfglm9-MgGvFzwqrH4_o8lfQNMddImd7fL--_R-pou73HZuVteZQu7fKfLzKmKzp55mWr7axVZicHs3jqb1JeVKVKVI06XJL81G1VvdJG7G0JJb4WRfErESar27Ywq9Z8N-AZ1kE8iS4p6vziNeJjWs01dIK8Le6Ns1kzh02_1B13UCy1SIjh06MDYjcLc6y13p_gSOcrZI-M\\\]\\\(http://cp.mcafee.com/d/avndyhJ5xx55CVEVvodTdLLCzB4sMCqejrXVEVh7cee6TTPhOyeophdLLCzBxdctsTh3icvFfglm9-MgGvFzwqrH4_o8lfQNMddImd7fL--_R-pou73HZuVteZQu7fKfLzKmKzp55mWr7axVZicHs3jqb1JeVKVKVI06XJL81G1VvdJG7G0JJb4WRfErESar27Ywq9Z8N-AZ1kE8iS4p6vziNeJjWs01dIK8Le6Ns1kzh02_1B13UCy1SIjh06MDYjcLc6y13p_gSOcrZI-M\\\)\\]\\(http://cp.mcafee.com/d/k-Kr6h8g41ASyMMyyPsQsLI6XCTTPhOyeojd79JZYQsEzC773rXVEVh7ccECTTPhOMCCeKrExF6fQDEaH4_o8lfQNMddRyvI4aDwoU6CSb6zDT_vvW_cIf3xR-LsKDuWf3DT7TNTbnhIyyHtdzBgY-F61K1FJ5ASDsTsTsS03pEJIiJe1KkAhxISU_ABT8_jalJbjYtSTAaRaYJ0yrESar27Ywq9Z8N-AZ1kE8iS4p6vziNeJjWs01dIK8Le6Ns1kzh02_1B13UCy1SIjh06MDYjcLc6y13p_gSOcr0W89Cw8C\\]<<a href=\\)

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From: <Ferrentino>,
"Michael.Ferrentino@indianriverschools.org"<<mailto:Michael.Ferrentino@indianriverschools.org>>

<Michael.Ferrentino@indianriverschools.orgmailto:Michael.Ferrentino@indianriverschools.org>

Date: Saturday, August 22, 2015 at 10:54 AM

To: Adri Lima <alima@academica.orgmailto:alima@academica.org>

Subject: RE: Reminder for Interview dates

Yes...

This will be a Public meeting...

From: Adriana Lima [mailto:alima@academica.org]

Sent: Saturday, August 22, 2015 10:53 AM

To: Ferrentino, Michael

Cc: dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>

Subject: Re: Reminder for Interview dates

Thank you, Mr. Ferrentino.

We will have Board, Founding members and an administrator from the school.

Will members of the public be allowed in the room?

Adri C. Lima / Academica

305.878.9993 / <http://cp.mcafee.com/d/k->

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On Aug 22, 2015, at 10:50 AM, Ferrentino, Michael

<Michael.Ferrentino@indianriverschools.orgmailto:Michael.Ferrentino@indianriverschools.org> wrote:

Hello Mr. Concepcion,

A friendly reminder regarding the dates and times we have set for our meetings with Somerset representatives as seen below.

Thank you...Mike Ferrentino

Dr. Michael Ferrentino

Executive Director ESE/SS

School District of Indian River County

1990 25th St.

Vero Beach, FL 32960

(772) 564-5932

Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org> /

From: Ferrentino, Michael
Sent: Tuesday, August 18, 2015 11:50 AM
To: 'Adriana Lima'
Cc: 'dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>'; Ferrentino, Michael
Subject: RE: Receipt of Applications

Good morning Ms. Lima,

Since we truly only have the 60 days this year we are going to have a tight timeframe to work within.

We have scheduled the "Interview" sessions as follows:

Somerset Academy Vero Beach -Monday, August 31,
2015 1:00 PM - 3:00 PM
Somerset Academy Middle School Vero Beach - Monday, August 31, 2015
3:00 PM - 5:00 PM

Additionally, we have scheduled our "Summary of Findings" sessions as follows:
Somerset Academy Vero Beach -Monday, September 14,
2015 1:00 PM - 3:00 PM
Somerset Academy Middle School Vero Beach - Monday, September 14, 2015 3:00 PM
- 5:00 PM

I hope representatives from Somerset can attend this important aspect of the review process.

Again, we ask that only Somerset Board and Founding Members, in addition to the current Principals of the Replication schools attend the Interview process.

Location:
School District of Indian River County
Teacher Education Center (TEC)
1990 25th Street
Vero Beach, FL 32960
(772) 564-3000

We are looking forward to seeing you at these meetings.

Thank you,

Michael Ferrentino, Ed.D.

Charter School Application Timeline-2015-2016

- July 31, 2015 SOMERSET ACADEMY APPLICATION RECEIVED.
- Aug. 3, 2015 SOMERSET ACADEMY MIDDLE APPLICATION RECEIVED.
- Aug. 14, 2015 Initial meeting with selected reviewers. Application forwarded to selected
(11-noon, LICR) reviewers for scoring and School Board members (SLC.)
- Aug. 17-21, 2015 selected reviewers begin working meetings with their staff.
- Aug. 21, 2015 Follow-up meeting with selected reviewers.
(11-noon, LICR)
- Aug. 24-28, 2015 (cont.) Selected reviewers - working meetings with their staff.
- Aug. 28, 2015 Follow-up meeting with selected reviewers. Preparatory meeting for Interviews (Public
meeting) with Somerset Representatives.
(11-noon, LICR)
-
- Sept. 10, 2015 District Review Team conducts Interviews **(Public Meeting) (1:00 PM, TEC)** with Somerset
Academy Representatives.
- District Review Team conducts Interviews **(Public Meeting) (3:00 PM, TEC)** with Somerset
Academy Middle Representatives.
- Sept. 11, 2015 Team Meeting to review Interview Question responses.
(11-noon, LICR)
- Sept. 11, 2015 Team meeting to prepare responses for Summary of Findings meeting.
- Sept. 21, 2015 District Review Team conducts, "Summary of Findings meeting"
(public meeting) (1:00 pm, TEC) for Somerset Academy Representatives.
- District Review Team conducts, "Summary of Findings meeting"
(public meeting) (3:00 pm, TEC) for Somerset Academy Middle Representatives.
- Sept. 22, 2015 Review Team Recommendations to Superintendent.
Notification to Somerset Representatives of Recommendation to Board.
- Sept. 24, 2015 (noon) Item placeholder on the School Board's 10/06/15 agenda for decision.
- Sept. 23-25, 2015 Notification of the Superintendent's recommendation to the School Board.
- October 06, 2015 School Board Meeting.
- October 07, 2015 Formal notification of Award or Denial after School Board meeting for Somerset Academy.
Formal notification to State of Florida of the status on the application.

4

Green, Bruce

From: Ferrentino, Michael <Michael.Ferrentino@indianriverschools.org>
Sent: Tuesday, September 01, 2015 4:40 PM
To: 'Adriana Lima'; 'dconcepcionfl@gmail.com'
Cc: Ferrentino, Michael
Subject: [ArcMail Restored] RE: Reminder for Interview dates
Attachments: 9-1-15-Revised Working Schedule for Somerset Application Review due to Storm.pdf

Good afternoon Ms. Lima,

I have spoken with our Review Team members and it seems that September 15, 2015 will work for us as well. Thus, **with your approval and consent we will reschedule as follows:**

Somerset Academy Elementary Vero to Tuesday, September 15, 2015 @ 1:30 AM - 3:00 PM Somerset Academy Middle Vero to Tuesday, September 15, 2015 @ 3:30 PM - 5:00 PM

I have attached a revised working schedule for your review and consent.

Thank you for your consideration,
Mike Ferrentino

From: Adriana Lima [mailto:alima@academica.org]
Sent: Monday, August 31, 2015 10:31 PM
To: Ferrentino, Michael
Subject: Re: Reminder for Interview dates

Good evening Mr. Ferrentino

We have had usual weather around here, nothing out of the norm. Sorry to hear about the flooding! I hope everyone is safe.

Somerset is asking if the meeting can happen Sept 15th so the group can all be there. Does that work for your team?
Thank you!

Adri C. Lima / Academica
305.878.9993 / www.academica.org<<http://www.academica.org>>

On Aug 31, 2015, at 2:29 PM, Ferrentino, Michael
<Michael.Ferrentino@indianriverschools.org<<mailto:Michael.Ferrentino@indianriverschools.org>>> wrote:
Hi Ms. Lima,

I trust that you fared well and that the flooding wasn't as bad as it was here in Indian River County. We have worked through another time frame for our meeting dates.

I would like to propose conducting the interviews on the afternoon of Thursday, September 10, 2015 as follows:

Somerset Academy Elementary Vero to Thursday, September 10, 2015 @ 1:30 AM - 3:00 PM Somerset Academy Middle Vero to Thursday, September 10, 2015 @ 3:30 PM - 5:00 PM

I have enclosed an attached revised schedule for your review and approval.

Thank you,
Michael Ferrentino

From: Adriana Lima [mailto:alima@academica.org]
Sent: Friday, August 28, 2015 3:31 PM
To: Ferrentino, Michael
Subject: Re: Reminder for Interview dates

That is no problem. Thank you so much!

Adri C. Lima / Academica
305.878.9993 / www.academica.org<<http://www.academica.org>>

On Aug 28, 2015, at 3:30 PM, Ferrentino, Michael
<Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>> wrote:
I will work on that.....
May not get back to you until Monday or Tuesday if that is ok?
Thanks....Mike

From: Adriana Lima [mailto:alima@academica.org]
Sent: Friday, August 28, 2015 2:20 PM
To: Ferrentino, Michael; 'dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>'
Cc: Alderman, Donna; Berg, Deborah; Blanco, Alice; Chesnut, Patricia; D'Agresta, Suzanne; Francis, Kathrine; Fritz, William; Green, Bruce; Hayes, Christina; Long, Deborah; Malits, Karen; McCarty, Patrick; Morrison, Carter; Robison, Jamie; Rynberg, Andrew; Suit, Edwina; Taylor, Christopher; Torres-Martinez, Lillian
Subject: Re: Reminder for Interview dates

Dr. Ferrentino and review team members,
Thank you for your email and consideration.
Somerset Academy, Inc. has a scheduled board meeting on September 11th. Are there any other dates in September that work for you? If not, I will work with the board to see if they can reschedule their meeting.

Thank you very much. Take care and be safe!

Adri C. Lima / Academica
305.878.9993/ alima@academica.org<<mailto:alima@academica.org>>

Office: 305.669.2906 / Fax: 305.669.4390
6340 Sunset Drive Miami, FL 33143
www.academica.org<<http://www.academica.org>>

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From: <Ferrentino>, "Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>"
<Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>>
Date: Friday, August 28, 2015 at 1:54 PM
To: Adri Lima <alima@academica.org<<mailto:alima@academica.org>>>, "dconcepcionfl@gmail.com<<mailto:dconcepcionfl@gmail.com>>"
<dconcepcionfl@gmail.com<<mailto:dconcepcionfl@gmail.com>>>

Cc: "Alderman, Donna" <Donna.Alderman@indianriverschools.org<mailto:Donna.Alderman@indianriverschools.org>>,"Berg, Deborah" <Deborah.Berg@indianriverschools.org<mailto:Deborah.Berg@indianriverschools.org>>,"Blanco, Alice" <Alice.Blanco@indianriverschools.org<mailto:Alice.Blanco@indianriverschools.org>>,"Chesnut, Patricia" <Patricia.Chesnut@indianriverschools.org<mailto:Patricia.Chesnut@indianriverschools.org>>,"D'Agresta, Suzanne" <Suzanne.D'Agresta@indianriverschools.org<mailto:Suzanne.D'Agresta@indianriverschools.org>>,"Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>" <Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>>,"Francis, Kathrine" <Kathrine.Francis@indianriverschools.org<mailto:Kathrine.Francis@indianriverschools.org>>,"Fritz, William" <William.Fritz@indianriverschools.org<mailto:William.Fritz@indianriverschools.org>>,"Green, Bruce" <Bruce.Green@indianriverschools.org<mailto:Bruce.Green@indianriverschools.org>>,"Hayes, Christina" <Christina.Hayes@indianriverschools.org<mailto:Christina.Hayes@indianriverschools.org>>,"Long, Deborah" <Deborah.Long@indianriverschools.org<mailto:Deborah.Long@indianriverschools.org>>,"Malits, Karen" <Karen.Malits@indianriverschools.org<mailto:Karen.Malits@indianriverschools.org>>,"McCarty, Patrick" <Patrick.Mccarty@indianriverschools.org<mailto:Patrick.Mccarty@indianriverschools.org>>,"Morrison, Carter" <Carter.Morrison@indianriverschools.org<mailto:Carter.Morrison@indianriverschools.org>>,"Robison, Jamie" <Jamie.Robison@indianriverschools.org<mailto:Jamie.Robison@indianriverschools.org>>,"Rynberg, Andrew" <Andrew.Rynberg@indianriverschools.org<mailto:Andrew.Rynberg@indianriverschools.org>>,"Suit, Edwina" <Edwina.Suit@indianriverschools.org<mailto:Edwina.Suit@indianriverschools.org>>,"Taylor, Christopher" <Christopher.Taylor@indianriverschools.org<mailto:Christopher.Taylor@indianriverschools.org>>,"Torres-Martinez, Lillian" <Lillian.TorresMartinez@indianriverschools.org<mailto:Lillian.TorresMartinez@indianriverschools.org>>
Subject: RE: Reminder for Interview dates

Hello Ms. Lima and Mr. Concepcion....

I met with the various review team members this morning in regards to the storm and our meeting schedule. Although at present, the superintendent is anticipating school to be open for business on Monday. However, all team members felt that considering that we are requesting you to come from our south counties, it is unfair, and probably unsafe, to have you drive through rain and wind even if it only remains a Tropical Storm. Thus, we have rescheduled the interviews as follows:

>From Monday, August 31, 2015 @ 1:00 - 2:30 PM for Somerset Academy
>Elementary Vero to Friday, September 11, 2015 @ 10:30 AM - 12 noon

Lunch 12 noon-1:00 PM

>From Monday, August 31, 2015 @ 2:30 - 5:00 PM for Somerset Academy
>Middle Vero to Friday, September 11, 2015 @ 1:00 PM - 2:30 PM

Thank you....be safe....

Mike Ferrentino
From: Adriana Lima [mailto:alima@academica.org]
Sent: Thursday, August 27, 2015 2:11 PM
To: Ferrentino, Michael
Subject: Re: Reminder for Interview dates

Good Afternoon Dr. Ferrentino

I hope you are doing well.

The team is set to go up on Monday. In the event the Tropical Storm/Hurricane is set to come this way, will you let me know prior to Monday morning if we will reschedule?

Looking forward to hearing from you.

Thanks

Adri C. Lima / Academica
305.878.9993/ alima@academica.org<<mailto:alima@academica.org>>

Office: 305.669.2906 / Fax: 305.669.4390
6340 Sunset Drive Miami, FL 33143
www.academica.org<<http://htmlsig.com/www.academica.org>>

[<http://3sparks.net/signature/images/social/facebook.png>]<<http://facebook.com/academicaschools>>[<http://3sparks.net/signature/images/social/twitter-2.png>]<<http://twitter.com/academicatweets>>[<http://3sparks.net/signature/images/social/instagram.png>]<<http://www.instagram.com/academicaschools>>

From: <Ferrentino>, "Michael.Ferrentino@indianriverschools.org<<mailto:Michael.Ferrentino@indianriverschools.org>>"
<Michael.Ferrentino@indianriverschools.org<<mailto:Michael.Ferrentino@indianriverschools.org>>>
Date: Saturday, August 22, 2015 at 10:54 AM
To: Adri Lima <alima@academica.org<<mailto:alima@academica.org>>>
Subject: RE: Reminder for Interview dates

Yes....
This will be a Public meeting...

From: Adriana Lima [<mailto:alima@academica.org>]
Sent: Saturday, August 22, 2015 10:53 AM
To: Ferrentino, Michael
Cc: dconcepcionfl@gmail.com<<mailto:dconcepcionfl@gmail.com>>
Subject: Re: Reminder for Interview dates

Thank you, Mr. Ferrentino.
We will have Board, Founding members and an administrator from the school.
Will members of the public be allowed in the room?

Adri C. Lima / Academica
305.878.9993 / www.academica.org<<http://www.academica.org>>

On Aug 22, 2015, at 10:50 AM, Ferrentino, Michael
<Michael.Ferrentino@indianriverschools.org<<mailto:Michael.Ferrentino@indianriverschools.org>>> wrote:
Hello Mr. Concepcion,

A friendly reminder regarding the dates and times we have set for our meetings with Somerset representatives as seen below.

Thank you....Mike Ferrentino

Dr. Michael Ferrentino
Executive Director ESE/SS
School District of Indian River County
1990 25th St.
Vero Beach, FL 32960
(772) 564-5932
Michael.Ferrentino@indianriverschools.org<<mailto:Michael.Ferrentino@indianriverschools.org>> /

From: Ferrentino, Michael

Sent: Tuesday, August 18, 2015 11:50 AM

To: 'Adriana Lima'

Cc: 'dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>'; Ferrentino, Michael

Subject: RE: Receipt of Applications

Good morning Ms. Lima,

Since we truly only have the 60 days this year we are going to have a tight timeframe to work within.
We have scheduled the "Interview" sessions as follows:

Somerset Academy Vero Beach	-Monday, August 31, 2015	1:00 PM - 3:00 PM
Somerset Academy Middle School Vero Beach	- Monday, August 31, 2015	3:00 PM - 5:00 PM

Additionally, we have scheduled our "Summary of Findings" sessions as follows:

Somerset Academy Vero Beach	-Monday, September 14, 2015	1:00 PM - 3:00 PM
Somerset Academy Middle School Vero Beach	- Monday, September 14, 2015	3:00 PM - 5:00 PM

I hope representatives from Somerset can attend this important aspect of the review process.

Again, we ask that only Somerset Board and Founding Members, in addition to the current Principals of the Replication schools attend the Interview process.

Location:

School District of Indian River County
Teacher Education Center (TEC)
1990 25th Street
Vero Beach, FL 32960
(772) 564-3000

We are looking forward to seeing you at these meetings.

Thank you,

Michael Ferrentino, Ed.D.

<2015 August 1st Timeline Somerset & Somerset Middle Application- Revised due to Storm.docx>

Indian River County School District

Charter School Application Timeline-2015-2016

- July 31, 2015 SOMERSET ACADEMY APPLICATION RECEIVED.
- Aug. 3, 2015 SOMERSET ACADEMY MIDDLE APPLICATION RECEIVED.
- Aug. 14, 2015 Initial meeting with selected reviewers. Application forwarded to selected (11-noon, LICR) reviewers for scoring and School Board members (SLC.)
- Aug. 17-21, 2015 selected reviewers begin working meetings with their staff.
- Aug. 21, 2015 Follow-up meeting with selected reviewers.
(11-noon, LICR)
- Aug. 24-28, 2015 (cont.) Selected reviewers - working meetings with their staff.
- Aug. 28, 2015 Follow-up meeting with selected reviewers. Preparatory meeting for Interviews (Public meeting) with Somerset Representatives.
(11-noon, LICR)
-
- Sept. 11, 2015 Review Compiled Interview Questions
(11-noon, LICR)
- Sept. 15, 2015 District Review Team conducts Interviews (Public Meeting) (1:00 PM, TEC) with Somerset Academy Representatives.

District Review Team conducts Interviews (Public Meeting) (3:00 PM, TEC) with Somerset Academy Middle Representatives.
- Sept. 18, 2015 Team Meeting to review Interview Question responses.
(1-2, LICR)
- Sept. 25, 2015 Team meeting to prepare responses for Summary of Findings meeting.
- Sept. 29, 2015 District Review Team conducts, "Summary of Findings meeting"
(public meeting) (1:00 pm, TEC) for Somerset Academy Representatives.

District Review Team conducts, "Summary of Findings meeting"
(public meeting) (3:00 pm, TEC) for Somerset Academy Middle Representatives.
- Sept. 30, 2015 Review Team Recommendations to Superintendent.
Notification to Somerset Representatives of Recommendation to Board.
- Oct. 1, 2015 Notification of the Superintendent's recommendation to the School Board.
- Oct. 1, 2015 (noon) Item placeholder on the School Board's 10/13/15 agenda for decision.
- October 13, 2015 School Board Meeting.
- October 14, 2015 Formal notification of Award or Denial after School Board meeting for Somerset Academy.
Formal notification to State of Florida of the status on the application.

5

Green, Bruce

From: Ferrentino, Michael <Michael.Ferrentino@indianriverschools.org>
Sent: Tuesday, September 01, 2015 4:45 PM
To: 'Adriana Lima'; 'dconcepcionfl@gmail.com'
Subject: [ArcMail Restored] RE: Reminder for Interview dates

Wonderful,

I will let the Review Team know that our revised schedule will work for both parties.

Looking forward to seeing you on the 15th.

Mike

From: Adriana Lima [mailto:alima@academica.org]
Sent: Tuesday, September 01, 2015 4:42 PM
To: Ferrentino, Michael; 'dconcepcionfl@gmail.com'
Subject: Re: Reminder for Interview dates

This is great. Thank you very much and we look forward to the 15th.

Adri C. Lima / Academica
305.878.9993/ alima@academica.org<mailto:alima@academica.org>

Office: 305.669.2906 / Fax: 305.669.4390
6340 Sunset Drive Miami, FL 33143
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[<http://3sparks.net/signature/images/social/facebook.png>]<<http://facebook.com/academicaschools>>[<http://3sparks.net/signature/images/social/twitter-2.png>]<<http://twitter.com/academicatweets>>[<http://3sparks.net/signature/images/social/instagram.png>]<<http://www.instagram.com/academicaschools>>

From: <Ferrentino>, "Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>"
<Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>>
Date: Tuesday, September 1, 2015 at 4:39 PM
To: Adri Lima <alima@academica.org<mailto:alima@academica.org>>,
"dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>"
<dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>>
Cc: "Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>"
<Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>>
Subject: RE: Reminder for Interview dates

Good afternoon Ms. Lima,

I have spoken with our Review Team members and it seems that September 15, 2015 will work for us as well.
Thus, with your approval and consent we will reschedule as follows:

Somerset Academy Elementary Vero to Tuesday, September 15, 2015 @ 1:30 AM - 3:00 PM Somerset Academy Middle Vero to Tuesday, September 15, 2015 @ 3:30 PM - 5:00 PM

I have attached a revised working schedule for your review and consent.

Thank you for your consideration,
Mike Ferrentino

From: Adriana Lima [mailto:alima@academica.org]
Sent: Monday, August 31, 2015 10:31 PM
To: Ferrentino, Michael
Subject: Re: Reminder for Interview dates

Good evening Mr. Ferrentino

We have had usual weather around here, nothing out of the norm. Sorry to hear about the flooding! I hope everyone is safe.

Somerset is asking if the meeting can happen Sept 15th so the group can all be there. Does that work for your team?

Thank you!

Adri C. Lima / Academica
305.878.9993 / www.academica.org<<http://www.academica.org>>

On Aug 31, 2015, at 2:29 PM, Ferrentino, Michael
<Michael.Ferrentino@indianriverschools.org<<mailto:Michael.Ferrentino@indianriverschools.org>>> wrote:
Hi Ms. Lima,

I trust that you fared well and that the flooding wasn't as bad as it was here in Indian River County. We have worked through another time frame for our meeting dates.

I would like to propose conducting the interviews on the afternoon of Thursday, September 10, 2015 as follows:

Somerset Academy Elementary Vero to Thursday, September 10, 2015 @ 1:30 AM - 3:00 PM Somerset Academy Middle Vero to Thursday, September 10, 2015 @ 3:30 PM - 5:00 PM

I have enclosed an attached revised schedule for your review and approval.

Thank you,
Michael Ferrentino

From: Adriana Lima [mailto:alima@academica.org]
Sent: Friday, August 28, 2015 3:31 PM
To: Ferrentino, Michael
Subject: Re: Reminder for Interview dates

That is no problem. Thank you so much!

Adri C. Lima / Academica
305.878.9993 / www.academica.org<<http://www.academica.org>>

On Aug 28, 2015, at 3:30 PM, Ferrentino, Michael
<Michael.Ferrentino@indianriverschools.org<<mailto:Michael.Ferrentino@indianriverschools.org>>> wrote:

I will work on that.....

May not get back to you until Monday or Tuesday if that is ok?

Thanks....Mike

From: Adriana Lima [mailto:alima@academica.org]

Sent: Friday, August 28, 2015 2:20 PM

To: Ferrentino, Michael; 'dconcepcionfl@gmail.com' <mailto:dconcepcionfl@gmail.com>

Cc: Alderman, Donna; Berg, Deborah; Blanco, Alice; Chesnut, Patricia; D'Agresta, Suzanne; Francis, Kathrine; Fritz, William; Green, Bruce; Hayes, Christina; Long, Deborah; Malits, Karen; McCarty, Patrick; Morrison, Carter; Robison, Jamie; Rynberg, Andrew; Suit, Edwina; Taylor, Christopher; Torres-Martinez, Lillian

Subject: Re: Reminder for Interview dates

Dr. Ferrentino and review team members,

Thank you for your email and consideration.

Somerset Academy, Inc. has a scheduled board meeting on September 11th. Are there any other dates in September that work for you? If not, I will work with the board to see if they can reschedule their meeting.

Thank you very much. Take care and be safe!

Adri C. Lima / Academica

305.878.9993/ alima@academica.org <mailto:alima@academica.org>

Office: 305.669.2906 / Fax: 305.669.4390

6340 Sunset Drive Miami, FL 33143

www.academica.org <http://htmlsig.com/www.academica.org>

[<http://3sparks.net/signature/images/social/facebook.png>] <<http://facebook.com/academicaschools>> [<http://3sparks.net/signature/images/social/twitter-2.png>] <<http://twitter.com/academicatweets>> [<http://3sparks.net/signature/images/social/instagram.png>] <<http://www.instagram.com/academicaschools>>

From: <Ferrentino>, "Michael.Ferrentino@indianriverschools.org" <mailto:Michael.Ferrentino@indianriverschools.org>
<Michael.Ferrentino@indianriverschools.org" <mailto:Michael.Ferrentino@indianriverschools.org>>

Date: Friday, August 28, 2015 at 1:54 PM

To: Adri Lima <alima@academica.org" <mailto:alima@academica.org>>,"

"'dconcepcionfl@gmail.com" <mailto:dconcepcionfl@gmail.com>"

<dconcepcionfl@gmail.com" <mailto:dconcepcionfl@gmail.com>>

Cc: "Alderman, Donna" <Donna.Alderman@indianriverschools.org" <mailto:Donna.Alderman@indianriverschools.org>>,"

"Berg, Deborah" <Deborah.Berg@indianriverschools.org" <mailto:Deborah.Berg@indianriverschools.org>>,"Blanco,

Alice" <Alice.Blanco@indianriverschools.org" <mailto:Alice.Blanco@indianriverschools.org>>,"Chesnut, Patricia"

<Patricia.Chesnut@indianriverschools.org" <mailto:Patricia.Chesnut@indianriverschools.org>>,"D'Agresta, Suzanne"

<Suzanne.D'Agresta@indianriverschools.org" <mailto:Suzanne.D'Agresta@indianriverschools.org>>,"

"Michael.Ferrentino@indianriverschools.org" <mailto:Michael.Ferrentino@indianriverschools.org">

<Michael.Ferrentino@indianriverschools.org" <mailto:Michael.Ferrentino@indianriverschools.org>>,"Francis, Kathrine"

<Kathrine.Francis@indianriverschools.org" <mailto:Kathrine.Francis@indianriverschools.org>>,"Fritz, William"

<William.Fritz@indianriverschools.org" <mailto:William.Fritz@indianriverschools.org>>,"Green, Bruce"

<Bruce.Green@indianriverschools.org" <mailto:Bruce.Green@indianriverschools.org>>,"Hayes, Christina"

<Christina.Hayes@indianriverschools.org" <mailto:Christina.Hayes@indianriverschools.org>>,"Long, Deborah"

<Deborah.Long@indianriverschools.org" <mailto:Deborah.Long@indianriverschools.org>>,"Malits, Karen"

<Karen.Malits@indianriverschools.org" <mailto:Karen.Malits@indianriverschools.org>>,"McCarty, Patrick"

<Patrick.Mccarty@indianriverschools.org" <mailto:Patrick.Mccarty@indianriverschools.org>>,"Morrison, Carter"

<Carter.Morrison@indianriverschools.org" <mailto:Carter.Morrison@indianriverschools.org>>,"Robison, Jamie"

<Jamie.Robison@indianriverschools.org" <mailto:Jamie.Robison@indianriverschools.org>>,"Rynberg, Andrew"

<Andrew.Rynberg@indianriverschools.org" <mailto:Andrew.Rynberg@indianriverschools.org>>,"Suit, Edwina"

<Edwina.Suit@indianriverschools.org<mailto:Edwina.Suit@indianriverschools.org>>, "Taylor, Christopher"
<Christopher.Taylor@indianriverschools.org<mailto:Christopher.Taylor@indianriverschools.org>>, "Torres-Martinez,
Lillian" <Lillian.TorresMartinez@indianriverschools.org<mailto:Lillian.TorresMartinez@indianriverschools.org>>
Subject: RE: Reminder for Interview dates

Hello Ms. Lima and Mr. Concepcion....

I met with the various review team members this morning in regards to the storm and our meeting schedule. Although at present, the superintendent is anticipating school to be open for business on Monday. However, all team members felt that considering that we are requesting you to come from our south counties, it is unfair, and probably unsafe, to have you drive through rain and wind even if it only remains a Tropical Storm. Thus, we have rescheduled the interviews as follows:

>From Monday, August 31, 2015 @ 1:00 - 2:30 PM for Somerset Academy
>Elementary Vero to Friday, September 11, 2015 @ 10:30 AM - 12 noon

Lunch 12 noon-1:00 PM

>From Monday, August 31, 2015 @ 2:30 - 5:00 PM for Somerset Academy
>Middle Vero to Friday, September 11, 2015 @ 1:00 PM - 2:30 PM

Thank you....be safe....

Mike Ferrentino

From: Adriana Lima [mailto:alima@academica.org]
Sent: Thursday, August 27, 2015 2:11 PM
To: Ferrentino, Michael
Subject: Re: Reminder for Interview dates

Good Afternoon Dr. Ferrentino

I hope you are doing well.

The team is set to go up on Monday. In the event the Tropical Storm/Hurricane is set to come this way, will you let me know prior to Monday morning if we will reschedule?

Looking forward to hearing from you.

Thanks

Adri C. Lima / Academica

305.878.9993/ alima@academica.org<mailto:alima@academica.org>

Office: 305.669.2906 / Fax: 305.669.4390

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From: <Ferrentino>, "Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>"
<Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>>

Date: Saturday, August 22, 2015 at 10:54 AM

To: Adri Lima <alima@academica.org<mailto:alima@academica.org>>

Subject: RE: Reminder for Interview dates

Yes....

This will be a Public meeting...

From: Adriana Lima [mailto:alima@academica.org]
Sent: Saturday, August 22, 2015 10:53 AM
To: Ferrentino, Michael
Cc: dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>
Subject: Re: Reminder for Interview dates

Thank you, Mr. Ferrentino.
We will have Board, Founding members and an administrator from the school.
Will members of the public be allowed in the room?

Adri C. Lima / Academica
305.878.9993 / www.academica.org<<http://www.academica.org>>

On Aug 22, 2015, at 10:50 AM, Ferrentino, Michael
<Michael.Ferrentino@indianriverschools.org<mailto:Michael.Ferrentino@indianriverschools.org>> wrote:
Hello Mr. Concepcion,

A friendly reminder regarding the dates and times we have set for our meetings with Somerset representatives as seen below.

Thank you....Mike Ferrentino

Dr. Michael Ferrentino
Executive Director ESE/SS
School District of Indian River County
1990 25th St.
Vero Beach, FL 32960
(772) 564-5932
Michael.Ferrentino@indianriverschools.org<<mailto:Michael.Ferrentino@indianriverschools.org>> /

From: Ferrentino, Michael
Sent: Tuesday, August 18, 2015 11:50 AM
To: 'Adriana Lima'
Cc: 'dconcepcionfl@gmail.com<mailto:dconcepcionfl@gmail.com>'; Ferrentino, Michael
Subject: RE: Receipt of Applications

Good morning Ms. Lima,

Since we truly only have the 60 days this year we are going to have a tight timeframe to work within.
We have scheduled the "Interview" sessions as follows:

Somerset Academy Vero Beach	-Monday, August 31, 2015	1:00 PM - 3:00 PM
Somerset Academy Middle School Vero Beach	- Monday, August 31, 2015	3:00 PM - 5:00 PM

Additionally, we have scheduled our "Summary of Findings" sessions as follows:
Somerset Academy Vero Beach -Monday, September 14, 2015 1:00 PM - 3:00 PM

Somerset Academy Middle School Vero Beach - Monday, September 14, 2015 3:00 PM - 5:00 PM

I hope representatives from Somerset can attend this important aspect of the review process. Again, we ask that only Somerset Board and Founding Members, in addition to the current Principals of the Replication schools attend the interview process.

Location:

School District of Indian River County
Teacher Education Center (TEC)
1990 25th Street
Vero Beach, FL 32960
(772) 564-3000

We are looking forward to seeing you at these meetings.

Thank you,

Michael Ferrentino, Ed.D.

<2015 August 1st Timeline Somerset & Somerset Middle Application- Revised due to Storm.docx>

6

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IN THE UNITED STATES DISTRICT COURT
IN AND FOR THE SOUTHERN DISTRICT
OF FLORIDA.

No. 64-721-Civil-CA

DENISE SHARPTON, et al.,

Plaintiffs,

vs.

THE BOARD OF PUBLIC INSTRUCTION
OF INDIAN RIVER COUNTY, FLORIDA,

Defendant.



ORDER

This cause coming on to be heard upon Plaintiffs' Motion for Further Relief and upon stipulation of counsel for entry of a Consent Order, and the Court having heard the argument of counsel and being fully advised in the premises, it is, therefore, upon consideration,

ORDERED, ADJUDGED AND DECREED that the **Final Decree entered herein on the 19th day of April, 1965**, as amended by Order dated November 12, 1965, and as corrected by Order entered December 30, 1965, be amended to read as follows:

1. Commencing with the 1967-68 school year, all grades, including kindergarten grades, in the public schools of Indian River County, Florida, shall be desegregated and students assigned to schools in these grades without regard to race or color. Every child eligible to enter and intending to enter any grade of the public schools of Indian River County, Florida, at the beginning of the 1967-1968 school year and subsequent school years may choose to attend any school in the county school system.

2. The following provisions shall apply to all grades:

(a) Who May Exercise Choice. A choice of schools may be exercised by a parent or other adult person serving as the student's

parent. A student may exercise his own choice if he (1) is exercising a choice for the ninth or a higher grade, or (2) has reached the age of fifteen at the time of the exercise of choice. Such a choice by a student is controlling unless a different choice is exercised for him by his parent or other adult person serving as his parent during the choice period or at such later time as the student exercises a choice. Each reference in this decree to a student's exercising a choice means the exercise of the choice, as appropriate, by a parent or such other adult, or by the student himself.

(b) Annual Exercise of Choice. All students, both white and negro, shall be required to exercise a free choice of schools annually.

(c) Choice Period. The period for exercising choice of a school shall commence March 1 and end March 31 of each year. No student or prospective student who exercises his choice within the choice period shall be given any preference because of the time within the period when such choice was exercised.

(d) Mandatory Exercise of Choice. A failure to exercise a choice within the choice period shall not preclude any student from exercising a choice at any time up to one week before the opening of school for the Fall term for the year with respect to which the choice applies, but such choice may be subordinated to the choices of students who exercised choice before the expiration of the choice period. Any student who has not exercised his choice of school within a week before school opens shall be assigned to the school nearest his home where space is available under standards for determining available space which shall be applied uniformly throughout the system.

(e) Public Notice. On or within a week before the date the choice period opens, the defendants shall arrange for the conspicuous publication of a notice describing the provisions of this decree in the newspaper most generally circulated in the community. The text of the notice shall be substantially similar to the text of the explanatory letter sent home to parents. Publication as a legal notice will not be sufficient. Copies of this notice must also be given at that time to all radio and television stations serving the community. Copies of this decree shall be posted in each school in the school system and at the office of the Superintendent of Education.

(f) Mailing of Explanatory Letters and Choice Forms. No later than the first day of the choice period there shall be distributed by first-class mail an explanatory letter and a choice form to the parent (or other adult person acting as parent, if known to the defendants) of each student, together with a return envelope addressed to the Superintendent.

(g) Extra copies of the Explanatory Letter and Choice Form. Extra copies of the explanatory letter and choice form shall be freely available to parents, students, prospective students, and the general public at each school in the system and at the office of the Superintendent of Education during the times of the year when such schools are usually open.

(h) Content of Choice Form. Each choice form shall set forth the name and location of the grades offered at each school and may require of the person exercising the choice the name, address, age of student, school and grade currently

or most recently attended by the student, the school chosen, the signature of one parent or other adult person serving as parent, or where appropriate the signature of the student, and the identity of the person signing. No statement of reasons for a particular choice, or any other information, or any witness or other authentication, may be required or requested, without approval of the court.

(i) Return of Choice Form. At the option of the person completing the choice form, the choice may be returned by mail, in person, or by messenger to any school in the school system or to the office of the Superintendent.

(j) Choices not on Official Form. The exercise of choice may also be made by the submission in like manner of any other writing which contains information sufficient to identify the student and indicates that he has made a choice of school.

(k) Choice Forms Binding. When a choice form has once been submitted and the choice period has expired, the choice is binding for the entire school year and may not be changed except in cases of parents making different choices from their children under the conditions set forth in paragraph (a) of this decree and in the exceptional cases where, absent the consideration of race, a change is educationally called for or where compelling hardship is shown by the student.

(l) Preference in Assignment. In assigning students to schools, no preference shall be given to any student for prior

attendance at a school and, except with the approval of court in extraordinary circumstances, no choice shall be denied for any reason other than overcrowding. In case of overcrowding at any school, preference shall be given on the basis of the proximity of the school to the homes of the students choosing it, without regard to race or color. Standards for determining overcrowding shall be applied uniformly throughout the system.

(m) Second Choice Where First Choice Is Denied.

Any student whose choice is denied must be promptly notified in writing and given his choice of any school in the school system serving his grade level where space is available. The student shall have seven days from the receipt of notice of a denial of first choice in which to exercise a second choice.

(n) Assignment by Superintendent in Default of Choice by Student. In order to utilize existing school space to the best advantage, a student who has not made a choice of a particular school may be assigned to such school as the Superintendent shall determine, provided such assignment is not based on race, color or national origin of any individual.

(o) Transportation. Where transportation is generally provided, buses must be routed to the maximum extent feasible in light of the geographic distribution of students, so as to serve students assigned in accordance with the provisions of this decree. Every student choosing either the formerly white or the formerly negro school nearest his residence must be transported to the school to which he is assigned under these provisions, whether or not it is his first choice, if that school is sufficiently distant

from his home to make him eligible for transportation under generally applicable transportation rules.

(p) Officials not to Influence Choice. At no time shall any official, teacher or employee of the school system influence any parent, or other adult person serving as a parent, or any student, in the exercise of a choice or favor or penalize any person because of a choice made. If the defendant school board employs professional guidance counselors, such persons shall base their guidance and counselling on the individual student's particular personal, academic and vocational needs. Such guidance and counselling by teachers as well as professional guidance counsellors shall be available to all students without regard to race or color.

(q) Protection of Persons Exercising Choice. Within their authority school officials are responsible for the protection of persons exercising rights under or otherwise affected by this decree. They shall, without delay, take appropriate action with regard to any student or staff member who interferes with the successful operation of the plan. Such interference shall include harassment, intimidation, threats, hostile words or acts, and similar behavior. The school board shall not publish, allow or cause to be published, the names or addresses of pupils exercising rights or otherwise affected by this decree. If officials of the school system are not able to provide sufficient protection, they shall seek whatever assistance is necessary from other appropriate officials.

3. Prospective Students. Each prospective new student shall be required to exercise a choice of schools before or at the time of enrollment.

All such students known to defendants shall be furnished a copy of the prescribed letter to parents, and choice form, by mail or, in person, on the date the choice period opens or as soon thereafter as the school system learns that he plans to enroll. Where there is no pre-registration procedure for newly entering students, copies of the choice forms shall be available at the Office of the Superintendent and at each school during the time the school is usually open.

4. Transfers.

(a) Transfers for Students. Any student shall have the right, at the beginning of a new term, to transfer to any school from which he was excluded or would otherwise be excluded on account of his race or color.

(b) Transfers for Special Needs. Any student who requires a course of study not offered at the school to which he has been assigned may be permitted, upon his written application, at the beginning of any school term or semester, to transfer to another school which offers courses for his special needs if such student qualifies on his cumulative record; however, no such application shall be denied because of race, color or national origin.

(c) Special or Exceptional Schools. The assignment of pupils to special or exceptional schools and classes such as those for the physically handicapped, the emotionally disturbed, the brain damaged, the gifted, and the mentally retarded shall be made upon academic excellence, physical need, mental capacity, or emotional condition without regard to the nearness of such school of the residence of such pupil and without regard to race, color or national origin.

5. Services, Facilities, Activities and Programs. No student shall be segregated or discriminated against on account of race or color in any service, facility, activity or program (including transportation, athletics, or other extracurricular activity) that may be conducted or sponsored by or affiliated with the school in which he is enrolled. A student attending school for the first time on a desegregated basis may not be subject to any disqualification or waiting period for participation in activities and programs, including athletics, which might otherwise apply because he is a transfer or newly assigned student except that such transferees shall be subject to long-standing, non-racially based rules of city, county or state athletic associations dealing with the eligibility of transfer students for athletic contests. All school use or school-sponsored use of athletic fields, meeting rooms and all other school related services, facilities, activities and programs such as Commencement exercises and parent-teacher meetings which are open to persons other than enrolled students, shall be open to all persons without regard to race or color. All special educational programs conducted by the defendants shall be conducted without regard to race or color.

6. School Equalization.

(a) Inferior Schools. In the event that any schools heretofore maintained for Negro students should be determined to be inferior with regard to physical facilities, equipment, courses of instruction or instructional materials to the quality of those provided in schools previously maintained for white students, the defendants shall promptly take such steps as are necessary to provide physical facilities, equipment, courses of instruction, and instructional materials of quality equal to that provided in schools previously maintained for white

students. Conditions of overcrowding, as determined by pupil-teacher ratios and pupil-classroom ratios shall, to the extent feasible, be distributed evenly between schools formerly maintained for Negro students and those formerly maintained for white students. If for any reason it is not feasible to improve sufficiently any school formerly maintained for Negro students, where such improvement would otherwise be required by this subparagraph, such school shall be closed as soon as possible, and students enrolled in the school shall be reassigned on the basis of freedom of choice. By October of each year, defendants shall report to the Clerk of the Court pupil-teacher ratios, pupil-classroom ratios, and per-pupil expenditures both as to operating and capital improvement costs, and shall outline the steps to be taken and the time within which they shall accomplish the equalization of such schools.

(b) Remedial Programs. The defendants shall take steps to provide remedial education programs which will permit students attending or who have previously attended all Negro schools to overcome any past inadequacies in their education.

7. New Construction. The defendants, to the extent consistent with the proper operation of the school system as a whole, shall locate any new school and substantially expand any existing schools with the objective of eradicating the vestiges of the dual system and of eliminating the effects of segregation.

8. Faculty and Staff.

(a) Faculty Employment. Race or color shall not be a factor in the hiring, assignment, reassignment, promotion,

demotion, or dismissal of teachers and other professional staff members, including student teachers, except that race may be taken into account for the purpose of counteracting or correcting the effect of the segregated assignment of teachers in the dual system. Defendants shall take steps to assign teachers, principals and staff members to schools so that the faculty and staff is not composed exclusively of members of one race. Wherever possible, teachers shall be assigned so that more than one teacher of the minority race (white or Negro) shall be on a desegregated faculty. Defendants shall take positive and affirmative steps to accomplish the desegregation of their school faculties and to achieve substantial desegregation of faculties in as many of the schools as possible for the 1967-68 school year notwithstanding that teacher contracts for the 1967-68 school year may have already been signed and approved. The tenure of teachers in the system shall not be used as an excuse for failure to comply with this provision. The defendants shall establish as an objective that the pattern of teacher assignment to any particular school not be identifiable as tailored for a heavy concentration of either Negro or white pupils in the school.

(b) Dismissals. Teachers and other professional staff members may not be discriminatorily assigned, dismissed, demoted, or passed over for retention, promotion, or rehiring, on the ground of race or color. In any instance where one or more teachers or other professional staff members are to be displaced as a result of desegregation, no staff vacancy in the school system shall be filled

through recruitment from outside the system unless no such displaced staff member is qualified to fill the vacancy. If, as a result of desegregation, there is to be a reduction in the total professional staff of the school system, the qualifications of all staff members in the system shall be evaluated in selecting the staff member to be released without consideration of race or color. A report containing any such proposed dismissals, and the reasons therefor, shall be filed with the Clerk of the Court, serving copies upon opposing counsel, within five (5) days after such dismissal, demotion, etc., as proposed.

9. Reports to the Court.

(a) Report on Choice Period. The defendants shall serve upon the opposing parties and file with the Clerk of the Court on or before June 15, 1967, and in each subsequent year on or before June 1, a report tabulating by race the number of choice applications and transfer applications received for enrollment in each grade in each school in the system, and the number of choices and transfers granted and the number of denials in each grade of each school. The report shall also state any reasons relied upon in denying choice and shall tabulate, by school and by race of student, the number of choices and transfers denied for each such reason.

In addition, the report shall show the percentage of pupils actually transferred or assigned from segregated grades or to schools attended predominantly by pupils of a race other than the race of the applicant, for attendance during the 1966-67 school year, with comparable data for the 1965-66 school year. Such

additional information shall be included in the report served upon opposing counsel and filed with the Clerk of the Court.

(b) Report After School Opening: The defendants shall, in addition to reports elsewhere described, serve upon opposing counsel and file with the Clerk of the Court within 15 days after the opening of schools for the fall semester of each year, a report setting forth the following information:

(i) The name, address, grade, school of choice and school of present attendance of each student who has withdrawn or requested withdrawal of his choice of school or who has transferred after the start of the school year, together with a description of any action taken by the defendants on his request and the reasons therefor.

(ii) The number of faculty vacancies, by school, that have occurred or been filled by the defendants since the order of this Court or the latest report submitted pursuant to this subparagraph. This report shall state the race of the teacher employed to fill each such vacancy and indicate whether such teacher is newly employed or was transferred from within the system. The tabulation of the number of transfers within the system shall indicate the schools from

which and to which the transfers were made. The report shall also set forth the number of faculty members of each race assigned to each school for the current year.

(iii) The number of students, by race, in each grade of each school.

10. Explanatory Letter. The defendants in complying with the provisions of Paragraph 2 of this decree, with regard to the mailing of explanatory letters and choice forms, shall use explanatory letters and choice forms in substantially the following form:

Board of Public Instruction
Indian River County
Vero Beach, Florida 32960

(Date Sent)

Dear Parent:

All grades in our school system will be desegregated next year. Any student who will be entering one of these grades next year may choose to attend any school in our system, regardless of whether that school was formerly all-white or all-Negro. It does not matter which school your child is attending this year. You and your child may select any school you wish.

Every student, white and Negro, must make a choice of schools. If a child is entering the ninth or higher grade, or if the child is fifteen years old or older, he may make the choice himself. Otherwise a parent or other adult serving as parent must sign the choice form. A child enrolling in the school system for the first time must make a choice of schools before or at the time of his enrollment.

The form on which the choice should be made is attached to this letter. It should be completed and returned by March 31, 1967. You may mail it in the enclosed envelope, or deliver it by messenger or by hand to any school principal or to the Office of the Superintendent. No one may require you to return your choice form before March 31, 1967 and no preference is given for returning the choice form early.

No principal, teacher or other school official is permitted to influence anyone in making a choice or to require early return of the choice form. No one is permitted to favor or penalize any student or other person because of a choice made. A choice once made cannot be changed except for serious hardship.

No child will be denied his choice unless for reasons of overcrowding at the school chosen, in which case children living nearest the school will have preference.

Transportation will be provided, if reasonably possible, no matter what school is chosen.

All parents will be sent a notice of the school to which their child will be assigned no later than June 2, 1967, by first class mail to their last known address.

Additional information concerning assignment procedures may be obtained by contacting Mr. Drennen Browne, Director of Educational Services, at the County School Office located at 1426 - 19th Street or by calling telephone number 562-6468.

Your School Board and the school staff will do everything we can to see to it that the rights of all students are protected and that desegregation of our schools is carried out successfully.

Sincerely yours,
Superintendent.

CHOICE FORM

This form is provided for you to choose a school for your child to attend next year. You have 30 days to make your choice. It does not matter which school your child attended last year, and does not matter whether the school you choose was formerly a white or Negro school. This form must be mailed or brought to the principal of any school in the system or to the office of the Superintendent, Board of Public Instruction, Indian River County, Vero Beach, Florida 32960, by June 1, 1967. A choice is required for each child.

Name of child _____
(Last) (First) (Middle)

Address _____

Mailing address, if different from above _____

Telephone No. at Home _____ Telephone No. at Work _____

Name of Parent or other adult serving as parent _____

If child is entering first grade, date of birth:

(Month) (Day) (Year)

Grade child is entering _____

School attended last year _____

Choose one of the following schools by marking an X beside the name.

Name of School	Grade	Location
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Signature _____
Date _____

To be filled in by Superintendent:
School Assigned _____

11. Jurisdiction is hereby retained to assure the full implementation of this Order and to make such other and further Orders that the Court may deem necessary and just and as changes and circumstances might require.

DONE AND ORDERED at Miami, Florida, this 13th day of May, 1967.

C. CLYDE ATKINS

Judge

I certify the foregoing to be a true and correct copy of the original which has been filed of record in this Office.

Joseph I. Bogart, Clerk
United States District Court
Southern District of Florida

By *J. I. Bogart*
Deputy Clerk

7

IN THE UNITED STATES DISTRICT COURT
IN AND FOR THE SOUTHERN DISTRICT OF
FLORIDA MIAMI DIVISION.

NO. 64-721-Civ-CA

DENISE SHARPTON, et al.,

Plaintiffs,

v.

THE BOARD OF PUBLIC INSTRUCTION
OF INDIAN RIVER COUNTY, FLORIDA,

Defendant.

DEFENDANT'S MEMORANDUM

ON PETITION TO INTERVENE

This is a class action on behalf of all Negro minors in Defendant's school district, similarly situated because of race or color, for relief against racial segregation in the public schools. 15 Am. Jur. 2d, Civil Rights, Section 75, Note 2. As originally instituted prior to the 1966 amendments to the rules, the action obviously constituted a "true" class action under Rule 23(a)(1) as distinguished from a "hybrid" or "spurious" class action under Rule 23(a)(2) or (3). Upon adoption of the 1966 amendments to the rules the action became a Subdivision (b)(2) class action, as distinguished from a Subdivision (b)(1) or (b)(3) class action. Notes of Advisory Committee on Rules, 28 USCA Rule 23, 1969 Supp., page 75.

The distinction is important because it renders inapplicable or irrelevant to this proceeding all of the "hybrid" or "spurious" class action cases cited by Petitioners. 3A Moore's Federal Practice, Par. 23.12. Further, the "one-way" intervention in "spurious" actions approved in the York, Hurd, State Wholesale Grocers, Speed and Tolliver cases cited by Petitioners has been excluded by the 1966 amendments to Rule 23. Notes of Advisory Committee on Rules, 28 USCA Rule 23, 1969 Supp., page 77.

The distinction is important for the further reason that it renders inapplicable to this proceeding the following requirement in Rule 23(c)(2), as amended, cited by Petitioners:

"In any class action maintained under subdivision (b)(3), the court shall direct to the members of the class the best notice practicable under the circumstances, including individual notice to all members who can be identified through reasonable effort. The notice shall advise each member that (A) the court will exclude him from the class if he so requests by a specified date; (b) the judgment whether favorable or not, will include all members who do not request exclusion; and (C) any member who does not request exclusion may, if he desires, enter an appearance through his counsel."

This Court's Order of May 13, 1967, approved a stipulation of counsel for entry of a Consent Order. Whether or not notice of proposed compromise should have been given to all members of the class under Rule 23(e) in connection with the entry of that order, is irrelevant for the following reasons: First, this Court's subsequent orders have completely nullified the 1967 order. Secondly, all subsequent orders in this case have arisen in adversary proceedings, and none of them constitutes a "compromise" in any sense of the word.

There is no statute of the United States which confers upon Petitioners an unconditional right to intervene. 4 Moore's Federal Practice, Par. 24.06. Nor does this Court have custody or control over any property that might be affected by the Court's disposition of the action. Id. at Para. 24.09. To intervene as a matter of right, Petitioners must make timely application, and they also must show that their interest is not adequately represented by existing parties. Rule 24(a)(2). No such showing has or can be made here; the application in any event comes too late.

By its Order Approving Plan, dated May 19, 1969, this Court granted Plaintiffs all of the relief requested in their Motion for Further Relief. Further, this Order granted all of the relief that this Court is empowered to grant under Federal law. The plan approved by the Court

substantially modified the Final Decree, completely eradicated all aspects of a dual school system, and thereby fulfilled this Court's prior continuing obligation under the Brown case to retain jurisdiction of the case during any necessary "period of transition." 47 Am. Jur., Schools, Section 219, 1969 Supp., page 64; 15 Am. Jur. 2d. Civil Rights, Section 75, Note 8. Subject to its unquestioned right and power to enforce the Final Decree, as modified, this Court has finally disposed of the cause and thereby has exhausted its jurisdiction over the subject matter of the action. 32 Am. Jur. 2d, Federal Practice and Procedure, Section 355, pages 862-863. Under the circumstances it is questionable whether this Court has jurisdiction to entertain a petition for intervention at this time. Annotation: Time Within Which Right To Intervene May Be Exercised, 37 A.L.R. 2d 1306, 1340, Note 8. Assuming arguendo that this Court does have jurisdiction to entertain a petition for intervention, intervention after final judgment or decree ordinarily is not allowed. Id. at pages 1340, 1347; 4 Moore's Federal Practice, Par. 24.13, page 99.

Wilson v. City of Paducah, D.C.W.D.Ky.1951, 100 F.Supp.116, cited by Petitioners, is clearly distinguishable. In that case certain Negroes sought to intervene after final judgment for the purpose of establishing that they were members of the class which the Court previously had held was entitled to attend a certain school on the same terms as white students. Intervention obviously was allowed for purposes of enforcement, not for the purpose of modification, impeachment or appeal.

No such intervention is necessary here. Defendant concedes that the judgment in the present case includes and extends to all members of the class. Rule 23(c)(3), as amended. It is not confined to those who actually appeared and asserted their rights. 15 Am. Jur. 2d, Civil Rights, Section 75, Note 9; 3A Moore's Federal Practice, Par. 23.12, page 3472.

Even though Petitioners are bound by the judgment, they cannot intervene as of right if they are in fact adequately represented by existing parties. St. Helena Parish School Board v. Hall, 5CA1961, 287 F2d 376; 4 Moore's Federal Practice, Par. 24.08, page 37. Inadequacy of representation is shown if there is proof of collusion between the representative and an opposing party, or if the representative has or represents some interest adverse to petitioner or fails because of nonfeasance in his duty of representation. Id. ad pages 38-39. No such showing can be made here. St. Helena Parish School Board v. Hall, *supra*. Petitioners' representatives have no interest adverse to Petitioners. They overcame in adversary proceedings a vigorous defense of the class claim. And they wholly and completely accomplished the entire purpose and objective of Brown v. Board of Education and this lawsuit.

Adequate representation of Petitioners' interest relates to representation with respect to the issue in the case, not to new issues which Petitioners desire to bring into the case. St. Helena Parish School Board v. Hall, *supra*. Annotation: Intervention As A Matter of Right, 84 A.L.R.2d 1412, 1419-1420. Representation may be inadequate, if the party fails to appeal an adverse judgment. On the other hand, a suggestion that representation is inadequate is negated by evidence of diligent prosecution or defense. Id., at pages 1421-1422. St. Helena Parish School Board v. Hall, *supra*.

No statute confers upon Petitioners a conditional right to intervene. To intervene permissively Petitioners must not only make timely application. They also must show that their claim and the main action have a question of law or fact in common. Rule 24(b). The discretionary right to intervene in a class suit is a corollary of the old class suit based on several rights under Former Rule 23(a)(3). 4 Moore's Federal Practice, Par. 24.10, page 59. But the case before the Court is not a Former

Rule 23(a)(3) case. It is a former Rule 23(a)(1) case that now constitutes a Subdivision (b)(2) class action. The rights of the members of the class are now and always have been joint or common, not several; Defendant has acted or refused to act on grounds generally applicable to the entire class, thereby making final injunctive or declaratory relief appropriate with respect to the class as a whole. Rule 23(b)(2).

Petitioners' claims and the main action have no common question of fact or law for the simple reason that Petitioners' claims and the claims of the existing representatives are joint, common and, in fact, identical. As stated in 3A Moore's Federal Practice, Par. 23.12:

"In the true class action, the judgment will be binding on all members of the class. Rule 24(a)(2) accords a right to intervene when a person is inadequately represented and may be bound by the judgment in the action. Of course, the party representative in a true class suit must adequately represent the other members of the class; and hence intervention will usually not be warranted in this type of action, unless because of circumstances peculiar to the intervener or because of a change of circumstances the representation is not adequate. . . ."

To allow intervention in the present circumstances would invite the very undue delay or prejudice in adjudicating the rights of original parties that this Court is enjoined by Rule 24(b)(2) to consider in passing on applications for permissive intervention.

As stated in 4 Moore's Federal Practice, Paragraph 24.10 at pages 63-64:

"Where permissive intervention is denied, it is most often upon the ground that adjudication of the rights of the original parties will be delayed or prejudiced. As the Supreme Court has said, 'To permit a multitude of (permissive) interventions may result in accumulating proofs and arguments without assisting the court.' Judge Wyzanski has stated this feature of the question more fully:

'It is easy enough to see what are the arguments against intervention where, as here, the intervenor merely underlines issues of law already raised by the primary parties. Additional parties always take additional time. Even if they have no witnesses of their own, they are the source of additional questions,

objections, briefs, arguments, motions and the like which tend to make the proceeding a Donnybrook Fair. Where he presents no new questions, a third party can contribute usually most effectively and always most expeditiously by a brief amicus curiae and not by intervention.'

"Intervention will frequently be denied, even though common questions of law or fact are presented, if in addition collateral or extrinsic issues would be brought in by the intervener. Conversely, however, intervention has been denied because the intervener raised no new issues and would merely delay adjudication of the case by his presence. Where the intervener sought to enjoin prosecution of other actions, intervention was denied, since whatever action was taken on the application for injunction, an appeal would probably have followed, resulting in delay in disposition of the action. Leave should not be granted if the court could not grant intervener any relief."

Where the right to intervene is discretionary, one factor in denying intervention will be the administrative inconvenience that intervention might cause, and the fact that intervention for the sole purpose of attacking a prior decree would be useless. 4 Moore's Federal Practice, Par. 24.16, page 121.

There is a general and well settled rule, stated by Mr. Justice Brandeis to be "that intervention will not be allowed for the purpose of impeaching a decree already made." 4 Moore's Federal Practice, Par. 24.16(5), page 120. This general intervention rule is based upon the same policy that establishes the general rule of finality of orders and judgments between original parties. Id. at page 121. Rarely should administrative orders and decrees entered prior to intervention be set aside at the intervener's behest. Ibid. Nor should other orders and decrees be set aside unless a clear case is made out that such prior order or decree would deprive the intervener of substantial rights which he has not been remiss in pursuing. Ibid.

Under Brown v. Board of Education, school authorities have the primary responsibility for elucidating, assessing and solving the problems

arising from implementing the constitutional principle that racial discrimination in public education is unconstitutional. 47 Am.Jur., Schools, Section 219, 1969 Supp., page 65. In compliance with this Court's Order of April 29, 1969, Defendant has taken appropriate action to eradicate all vestiges of the dual system. Given the specific choice of integrating or eliminating four previously all-black schools, Defendant has filed, and this Court has approved as "eminently satisfactory" an integration plan that completely eradicates all aspects of the dual system. The Affidavit in Support of Intervention affirmatively discloses that Petitioners met with Defendant's representatives and discussed with them the advantages of continuing Gifford High School as a high school prior to the submission of Defendant's plan. The plan attached to the Affidavit is the same plan which the plaintiffs have urged throughout this proceeding. As elected officials the individual defendants have ultimate responsibility for fashioning a plan of integration most workable and least disruptive to the education of all children in Indian River County. The plan approved by the Court was adopted at a regularly scheduled meeting after public hearing and careful consideration of all of the many facets of the entire system. To allow Petitioners to intervene at this point might well encourage other groups or individuals having specific complaints about Defendant's plan to believe that this Court proposes to substitute its own plan, to modify Defendant's plan, or to authorize appeals by dissatisfied groups who have not previously appeared and participated in this action.

A decision, judgment or order of a District Court is final for the purpose of appeal to a Court of Appeals when it terminates the litigation on the merits and leaves nothing to be done but to enforce by execution the judgment or what has been determined. 32 Am.Jur.2d, Federal Practice and Procedure, Section 355, pages 862-863. The general rule is that where a judgment is amended in a material and substantial respect the

time within which an appeal may be taken from such determination begins to run from the date of the amendment. 4 Am. Jur. 2d, Appeal and Error, Section 308. By statute and the rules, the time for appealing this Court's Order Approving Plan expired thirty days after its entry. 32 Am. Jur. 2d, Federal Practice and Procedure, Section 362. Courts of Appeals also have recognized or applied such rules as that a party cannot appeal from a judgment in his favor or not adverse to him, unless a judgment gives him only part of that which he seeks and denies him the balance, and that a party who secures by a judgment all of the relief he seeks cannot maintain an appeal to reverse or modify it or to review the proceedings on which it is founded. 32 Am. Jur. 2d, Federal Practice and Procedure, Section 353, page 860.

CONCLUSION

Contrary to Rule 24(e) Petitioners have not complied with procedural requirements in that they have not served a motion stating grounds therefor on all parties affected, specifically this Defendant. Nor have they attached a pleading setting forth the claim for which intervention is sought. 4 Moore's Federal Practice, Par. 24.12. This Court has exhausted its jurisdiction over the subject matter of the action, and the issues sought to be injected by Petitioners relate entirely to matters of internal school administration over which this Defendant has primary responsibility, peculiar competence and exclusive jurisdiction or authority.

It is questionable whether this Court has jurisdiction (1) to entertain a petition for intervention, (2) to modify the Final Decree, as amended, or (3) to authorize an appeal. Petitioners' Affidavit presents substantially the same plan that Plaintiffs have urged throughout this proceeding. No basis whatever exists for permissive intervention and no showing of inadequate representation, such as would warrant intervention as of right, has or can be made. Neither the existing Plaintiffs, nor the Interveners

have standing to appeal the Order Approving Plan because it grants them all relief requested and all relief that is available in a Federal forum. The time for appeal has expired in any event.

An Order granting intervention might well encourage other dissatisfied groups and individuals to believe that this Court or the Court of Appeals will or may substitute its judgment for that of elected school officials in matters relating entirely to internal school administration. Petitioners' available remedies appear to be administrative and political; if any judicial remedy exists it must be found in a state court.

Finally, Defendant urges the Court to consider the past history of this litigation in the light of these facts. Beginning with Plaintiffs' Motion for Further Relief in October 1968, and continuously thereafter throughout this entire proceeding, Defendant has consistently announced to the Court at every hearing that Defendant was most anxious to have all questions adjudicated as quickly as possible. Defendant is confronted with a massive administrative problem in rearranging the places of attendance at schools of its student population. This also involves a complete revamping of its bus system. Among other things, this administrative detail requires written notice to the parents of every pupil in the system advising them of the school their child will attend. All administrative personnel of the system have been diligently working on these many administrative details, the written notices have been mailed, and the administrative staff is now interviewing dissatisfied parents, explaining the new bus routing and doing all within their power to permit the opening of the public school system at the first part of September according to the announced and approved plan for total integration. Teacher assignments have been made, and many teachers have left the State until the fall. Any change at this time would make it impossible to make new assignments, mail letters to parents of each student, revamp again the bus schedules, and perform all of the administrative tasks

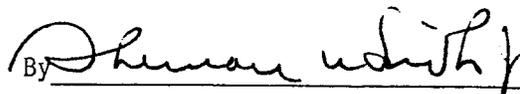
required before the regularly scheduled opening day of school. Therefore, aside from Defendant's firm belief that under the law this Court cannot properly grant the Petition to intervene, Defendant urges this Court not at this late date to entertain any proceeding which would interrupt or postpone the opening of the coming session of the public schools of Indian River County or require the opening to occur without some reasonable semblance of order, plan and notice to the parents of its students.

Respectfully submitted,

G. KENDALL SHARP
Of Mitchell, Sharp & Johnston
P. O. Box 1660
Vero Beach, Florida 32960

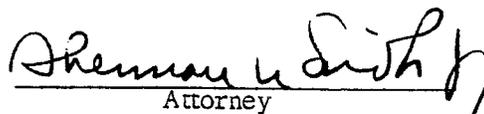
and

SHERMAN N. SMITH, JR.
Of Smith, Heath, Smith & O'Haire
P. O. Box 518
Vero Beach, Florida 32960

By 

Attorneys for Defendant.

I HEREBY CERTIFY that a copy hereof has been served on HORACE E. HILL, ESQ., 248 North Campbell Street, Daytona Beach, Florida 32014, and on EARL M. JOHNSON, ESQ., 625 West Union Street, Jacksonville, Florida 32202, attorneys for Petitioners and Plaintiffs, respectively, by mail this 8 day of July 1969.


Attorney

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MEMBERSHIP BY GRADE/RACE/GENDER BY SCHOOL

SCHOOL YEAR 2014-15, SURVEY 2 as of 12/20/14

SCHOOL TOTALS

White	Black	Hispanic	School
11%	1%	87%	Somerset Academy Elementary School
14%	2%	83%	Somerset Academy Charter Middle School
7%	22%	68%	District - Dade
40%	23%	31%	State
56%	17%	22%	District - Indian River

Source: Extracted from the Florida Department of Education report regarding student membership by school by race/gender. The full report can be reviewed here:

<http://www.fldoe.org/core/fileparse.php/7584/urlt/MembershipSchoolRaceGender1415.xls>

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13-DADE

SOMERSET ACADEMY CHARTER MIDDLE SOUTH MIAMI-6063

Students Enrolled by Grade Level

Applied filters: District equal to 13-DADE

Enrollment	Year	1-White	2-Hispanic	3-Black	4-Asian	5-American Indian
% of Students by Race	2011-12	17.8%	78.0%	**	**	**
	2012-13	16.8%	80.2%	**	**	**
	2013-14	21.2%	76.1%	**	**	**
	2014-15	13.9%	82.8%	**	**	**
# of Students	2011-12	21	92	**	**	**
	2012-13	22	105	**	**	**
	2013-14	24	86	**	**	**
	2014-15	21	125	**	**	**

Note: To protect the privacy of individual students, data are not reported when the total number of students in a group is fewer than 10. Double asterisks (**) will appear when data are suppressed. When there are no students reported in a category, a dot (.) will appear in the table cell.

Based on the above data we can determine that there were the following percentages of White and Hispanic students combined.

2011 – 2012 (17.8% + 78.0% = 95.8%)

2012 – 2013 (16.8% + 80.2% = 97.0%)

2013 – 2014 (21.2% + 76.1% = 97.3%)

Seeing that there are Asian students with double asterisks (**) in each year and American Indian in some years, we know that the percentage of Black students in each year must be less than the following percentages:

2011 – 2012 (100% - 95.8% = **4.2%**)

2012 – 2013 (100% - 97.0% = **3.0%**)

2013 – 2014 (100% - 97.3% = **2.7%**)

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Suzanne D'Agresta

From: D'Agresta, Suzanne <Suzanne.D'Agresta@indianriverschools.org>
Sent: Wednesday, August 12, 2015 10:03 AM
To: Suzanne D'Agresta
Subject: FW: Receipt of Applications

From: Ferrentino, Michael
Sent: Wednesday, August 12, 2015 10:02:29 AM
To: D'Agresta, Suzanne
Subject: FW: Receipt of Applications
Auto forwarded by a Rule
Hi Suzanne.....
This is a confirmation of receipt that I sent to Ms. Lima.
Thanks.....Mike

From: Ferrentino, Michael
Sent: Wednesday, August 05, 2015 1:10 PM
To: Adriana Lima (alima@academica.org)
Cc: Ferrentino, Michael
Subject: Receipt of Applications

Good afternoon Ms. Lima,

Just a short email to inform you that we are **in receipt of the following applications:**

- 1) Friday, July 31, 2015 – Somerset Academy Vero Beach
- 2) **Monday, August 3, 2015 - Somerset Academy Middle School Vero Beach**

I will be meeting with our Superintendent next Wednesday.....after-which I will forward to you an evaluation agenda.

Thank you.....Mike

Dr. Michael Ferrentino

Executive Director ESE/SS
School District of Indian River County
1990 25th St.
Vero Beach, FL 32960
(772) 564-5932
Michael.Ferrentino@indianriverschools.org /

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Somerset Academy Middle School Vero Beach

MODEL FLORIDA CHARTER SCHOOL APPLICATION

High Performing Replications

Submitted Pursuant to Section 1002.331, Florida Statutes





Executive Summary

The application before you is submitted by Somerset Academy, Inc. to open Somerset Academy Middle School Vero Beach in the School District of Indian River County. The school plans to serve students in grades 6-8 beginning with 235 students in the first year of operation with a maximum enrollment of 300 students.

The application being submitted is a High Performing Replication Pursuant to Section 1002.331, Florida Statutes of Somerset Academy Charter Middle School South Miami Campus, MSID#: 13-6053 (*Please see Appendix F –High Performing School verification letter*). 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.

The mission at Somerset Academy Vero Beach is to bilingually foster student achievement by providing a technologically, innovative and challenging educational environment; to develop high academic standards; to instill a sense of compassion and understanding for others, facilitated by a highly qualified staff.

Similar to the school to be replicated, students will be expected to perform at or above grade level availing success in middle school and preparing them for high school studies. Somerset Academy Charter Middle School South Miami has just completed its 5th year of operation, serving 152 students in grades 6-8. The school has earned a letter grade of "A" since inception, based on the points it received under the State of Florida Accountability Program. SoMi ranked among the top five highest performing public middle schools in all of Miami-Dade County.

The school to be replicated offers language programs in Spanish and Mandarin, as well as the latest classroom technology, including Promethean Boards and laptop computers (which the school has budgeted for). The School will replicate the commitment to develop bilingual students who are culturally aware, pluralistic and thereby have a global edge. The School will also feature technology-rich classrooms, be staffed with highly qualified teachers, thus providing an enriching learning environment where children can flourish as individuals while acquiring knowledge and skills essential to their future development.

The School will not discriminate on the basis of race, religion, or national or ethnic origin in the admission of students and will implement a diverse enrollment and marketing plan in order to achieve racial/ethnic balances reflective of the surrounding public schools.

Thank you for your consideration. We look forward to working with the School District of Indian River County.

David Concepcion, Board Chair
Somerset Academy, Inc.

APPLICATION COVER SHEET

NAME OF PROPOSED CHARTER SCHOOL: Somerset Academy Middle School Vero Beach

Name of HP school submitting Application*: Somerset Academy Charter Middle School South Miami Campus
MSID#: 13-6053

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: Adriana Lima/cc David Concepcion

TITLE/RELATIONSHIP TO NONPROFIT: Board Authorized Representative/Board Chair

MAILING ADDRESS: c/o 6340 Sunset Drive, Miami, FL 33143

PRIMARY TELEPHONE: 305 878 9993 **ALTERNATE TELEPHONE:** () _____

E-MAIL ADDRESS: adri5283@gmail.com / cc: dconcepcionfl@gmail.com

NAME OF EDUCATION SERVICE PROVIDER (if any): Academica

NAME OF PARTNER/PARENT ORGANIZATION (if any): N/A

Projected School Opening Date: 2016-2017

School Year	Grade Levels	Total Projected Student Enrollment	Student Enrollment Capacity (if known)
First Year	6-8	Up to 235	Up to 235
Second Year	6-8	Up to 300	Up to 300
Third Year	6-8	Up to 300	Up to 300
Fourth Year	6-8	Up to 300	Up to 300
Fifth Year	6-8	Up to 300	Up to 300

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

Board Chair
Title

7/27/15
Date

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Addendum C	ESP Operated Schools (Form IEPC – M1A)

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.

The charter school application before you is being submitted by the Somerset Academy, Inc. Governing Board of Directors for Somerset Academy Middle School Vero Beach. 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.

Somerset Academy, Inc High Performing Charter Schools						
MSID	DISTRICT ID	DISTRICT NAME	SCHOOL CODE	SCHOOL NAME	GRADE LEVEL	DATE EFFECTIVE
065141	6	BROWARD	5141	SOMERSET ACADEMY	K-5	7/29/11
065221	6	BROWARD	5221	SOMERSET ACADEMY CHARTER HIGH	9-12	7/29/11
065211	6	BROWARD	5211	SOMERSET ACADEMY DAVIE CHARTER	K-5	7/29/11
065391	6	BROWARD	5391	SOMERSET ACADEMY EAST PREPARATORY	K-6	9/5/13
065405	6	BROWARD	5405	SOMERSET ACADEMY ELEMENTARY (MIRAMAR CAMPUS)	K-5	7/29/11
065406	6	BROWARD	5406	SOMERSET ACADEMY MIDDLE (MIRAMAR CAMPUS)	6-8	7/29/11
065151	6	BROWARD	5151	SOMERSET ACADEMY MIDDLE SCHOOL	6-8	7/29/11
065021	6	BROWARD	5021	SOMERSET NEIGHBORHOOD SCHOOL	K-5	10/6/14
130332	13	DADE	332	SOMERSET ACADEMY (SILVER PALMS)	K-8	7/29/11
134012	13	DADE	4012	SOMERSET ACADEMY AT SILVER PALMS	K-5	10/6/14
130520	13	DADE	520	SOMERSET ACADEMY CHARTER	K-5	7/29/11
137042	13	DADE	7042	SOMERSET ACADEMY CHARTER HIGH SCHOOL	9-12	7/29/11
136004	13	DADE	6004	SOMERSET ACADEMY CHARTER MIDDLE SCHOOL	6-8	7/29/11
136013	13	DADE	6013	SOMERSET ACADEMY CHARTER MIDDLE SCHOOL (SOUTH HOMESTEAD)	6-8	10/8/12
136053	13	DADE	6053	SOMERSET ACADEMY CHARTER MIDDLE SCHOOL SOUTH MIAMI CAMPUS	6-8	9/5/13
132007	13	DADE	2007	SOMERSET ACADEMY ELEMENTARY SCHOOL SOUTH MIAMI CAMPUS	K-5	9/5/13

- 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.

In general, all Somerset Academy schools share a common philosophy/expectation of student excellence; an expectation of parental commitment; and a collaborative management infrastructure, among other things, which was established at the inception of the Somerset model and has yielded success for the Somerset schools. These factors support the organization's capacity to replicate the model and the Somerset Academy middle school design. Specifically, Somerset Academy Vero Beach will be a direct replication of the High Performing School, Somerset Academy Charter Middle School South Miami Campus, MSID#: 136053 (*Please see Appendix F - High Performing School verification letter*)

Similar to the school to be replicated, Somerset students will be expected to perform at or above grade level availing success in middle school and preparing them for high school studies. Somerset Academy Charter Middle School South Miami has just completed its 5th year of operation, serving 152 students in grades 6-8. The school has earned a letter grade of "A" since inception, based on the points it received under the State of Florida Accountability Program.

The school to be replicated offers language programs in Spanish and Mandarin, as well as the latest classroom technology, including Promethean Boards and laptop computers. The School will replicate the commitment to develop bilingual students who are culturally aware, pluralistic and thereby have a global edge. The School will also feature technology-rich classrooms, be staffed with highly qualified teachers, thus providing an enriching learning environment where children can flourish as individuals while acquiring knowledge and skills essential to their future development. As a replicated school, Somerset will work with the administration and staff at the replicated school in an effort to align and mirror all areas including, but not limited to: Somerset Reading Coach PLC Dialogues, Math and Science PLC Dialogues, the school instructional calendar (so long as it aligns with SDIRC's requirements), educational trainings and PDs, parent nights, newsletter, extra-curricular activities, character education program and curriculum, etc.

Moreover, Somerset will maintain Somerset's underlying purpose, which is Academic Excellence with a push towards Secondary (and even College and Career) Readiness. The emphasis of the Somerset framework is a "push and pull" method of preparing students to maximize upon their potential, wherein students are pushed to pursue the most rigorous and challenging academic program they can handle, while students who are struggling and/or underachieving are pulled out for remediation through an intensive tutoring program and taught using supportive learning strategies. As a result, students will be better prepared for success in college preparation coursework. These and other Somerset "best practices", explained herein this application, and which are established pillars of the Somerset Academy, Inc. trademark, are derived from over 17 years of experience with innovative board members, parents and educators working together with a common purpose.

Furthermore, to ensure the educational program proposed by the applicant will be a substantial replication of the aforementioned HP school, the governing board will ensure Somerset will replicate the best practices of the replicated school, including but not limited to:

- ensuring fidelity of instructional programming, and utilizes appropriate grade/subject level pacing guides and focus calendars utilized by Somerset Academy Charter Middle South Miami Campus;
- meeting periodically by grade level and/or subject to plan and share best practices and creating lesson plans to be submitted to department heads for review;
- utilizing the common board configuration - outlining the objectives, agenda, essential questions, and home learning assignments for each class;
- verifying the fidelity of curriculum implementation through co-teaching, modeling, and mentoring;
- ensuring teachers are on task and effective, utilizing various processes such as: Formal observations conducted at least once a year, classroom, walkthroughs conducted daily, and ongoing review of student performance data and results as a means to inform instruction;
- using qualitative and quantitative data to inform and guide instructional planning and practices aligned with Language Arts and Mathematics Florida Standards (LAFS and MAFS) and the respective Next Generation Sunshine State Standards for other subject areas, as applicable;
- using numerous data results from state summative assessments – and collecting, disaggregating and compiling Data Binders to use for data charts;

- ensuring the School engages in the same student data-driven continuous improvement methodology that is utilized at the school to be replicated;
- engaging in professional development for implementation of curriculum;
- implementing the same cornerstone elements: high expectations (through a push and pull philosophy); project based learning; targeted tutoring; and parental involvement through EESAC and an active PTSA;
- recruiting faculty and staff (including international faculty, whenever possible) that are committed to deliver a rigorous curriculum, support multicultural and bilingual education, and maintain a differentiated instructional approach to ensure student success;
- ensuring Somerset implements the same curriculum, materials, and scheduling process that is utilized at the replicated school, as is reflected herein this application, which are in alignment with SDIRC requirements;
- providing access to supervised study time and tutoring after school (and possibly on Saturdays as well) to accelerate student progress; and
- availing access and offering supports for students who wish to pursue an advanced academic program.

Somerset will implement the above mentioned best practices utilized at Somerset Academy Charter Middle School South Miami and will align such best practices with the requirements and curriculum of the School District of Indian River County.

Additionally, in order to accurately reflect and commit to replicating the educational programming at Somerset, which is being implemented at the HP school to be replicated; the applicant has committed to employ the following actions:

- Involve the HP school's leadership team in the application and planning processes of the school;
- Assign administrator or designated representative from the High Performing School Site as a mentor to the Somerset principal, to assist with planning and first, and second year implementation of the program. The mentor will be available to meet with the principal frequently and on an as-needed basis for support, mentoring, and coaching services via teleconference, video conference, on-site visits, etc.
- Appoint the HP School site administrator to the interview committee that will select the Somerset principal;
- Guarantee Somerset meets all five AdvancEd/Southern Association Colleges and Schools-Council on Accreditation and School Improvement (SACS-CASI) Standards for schools; and
- Ensure support is provided from not only the replicated school but also from all Somerset schools within the entire network wherein all other leaders serve as mentors to new administrators and everyone shares ownership and accountability in maintaining the thriving, financially viable and academically high performing network of charter schools.

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.

Over the past seventeen years, Somerset Academy stakeholders have become an accomplished and established team, with a proven track record of academic and financial success that guarantees the human and financial resources to increase, sustain, and ensure the quality and performance of its schools. Each of the current schools benefits from the support and scrutiny of several entities including the governing board, sponsoring local school district, and an outside educational service and support firm, to name a few.

The Somerset Board has the responsibility for the affairs and management of all Somerset schools (including both the HP school to be replicated and the proposed School discussed herein the application) and will provide continuing oversight of all Somerset school operations across Florida, Washington D.C., Texas and Nevada. The school principal, hired by the Board, will be responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The Governing Board of the School is the ultimate policy-making body that determines the academic direction, approves curriculum, and oversees operation of all Somerset schools. The board of the proposed School is comprised of the same individuals responsible for the existing HP School to be replicated as well as all other successful Somerset schools, thus, they have ownership of the program and the experience to ensure the existing HP school model is replicated with fidelity.

The strategies the governing board has identified for replication of the existing HP School design include, but are not limited to, the following:

- Implement the same core values, and beliefs of the existing program;
- Adopt the same and proven research-based educational concept and utilizing the same curriculum strategies from the existing program;
- Utilize existing stakeholders as sort of consultants, to continuously provide training to Somerset administrators, faculty and staff;
- Adopt common expectations of student behavior and parental involvement;
- Adopt common Professional Policies and Standards for staff;
- Implement the policies for financial management and oversight proven effective in the existing school and amongst all Somerset schools; and
- Provide ongoing communication, training, and support for the school's changing operational needs.

Additionally, the President of Somerset Academy, will oversee and support the business, operations and educational programming of the Somerset schools. The president also reports on all aspects of school operations and makes recommendations to the Board. The President is not a member of the Board, has no vote on the Board, however is responsible for implementing the Somerset Academy, Inc. Strategic Plan. The President will have a supportive role in the operation of Somerset overseeing the business, operation and educational programming of the School, providing necessary support if necessary and overseeing that the proposed school implements the Somerset educational program with fidelity.

Furthermore, the educational leadership and on-site management of Somerset schools are delivered through the school Principal. The business and facilities coordination and support services are delivered through Academica, a contracted Education Service Provider. As stated previously, an administrator Somerset Academy Charter Middle South Miami Campus will serve as a mentor leader and assist the new principal in the implementation of the school. The School leader will also benefit from the professional and business support and services of Academica, freeing the principal from many administrative and compliance duties, which would otherwise have to be shouldered internally, thereby allowing him/her to serve as the instructional leader of the school. With a staff of trained professionals, Academica will ensure Somerset is professionally supported and operated in accordance with the requirements of sponsor contracts and the requirements of all State and Federal laws, as well as local municipal ordinances applicable to its operations or facilities.

Also, Somerset Academy holds "Principal Chats" and workshops which serve as a support network of school administrators experienced in "the Somerset way." This group collectively ensures continuous improvement of not only their respective school sites, but also of the Somerset system of schools. A lead principal is selected by Somerset colleague principals, and this person will also be involved in the operation of Somerset, as an additional

support and mentor, providing curriculum and instruction support to the new school principal.

The involvement of the aforementioned individuals in the Somerset system and specifically in both schools, demonstrates great capacity and competence to support the operation and the implementation of the High Performing replication at the proposed Somerset Academy Vero Beach.

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	Minority Rate
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	
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
Somerset Academy Charter Middle School South Miami	6053	2013-14	A	758	91	86	65	80	8	79
		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
Somerset Academy-Middle, Eagle Campus	1261	2013-14	B	560	61	52	73	23	49	93
		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
Somerset Academy at Silver Palms	4012	2013-14	B	579	72	70	66	58	23	36
		2012-13	B	445	63	57	51	32	85	96
		2011-12	A	541	60	53	74	50	82	96
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

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.

The vision of Somerset Academy, Inc

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

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.

To ensure the applicant will continue to achieve the Somerset vision and mission, the School will implement the following:

The mission at Somerset Academy Middle School Vero Beach is to bilingually foster student achievement by providing a technologically, innovative and challenging educational environment; to develop high academic standards; to instill a sense of compassion and understanding for others, facilitated by a highly qualified staff.

- 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 charter legislation, the school will meet high standards of student achievement through implementation of the strategies addressed throughout this application, and summarized as follows:

- Providing a highly rigorous curriculum, infused with effective, proven teaching strategies, that incorporate the Language Arts and Mathematics Florida Standards (LAFS and MAFS) and the respective Next Generation Sunshine State Standards for other subject areas, as applicable with research-based, print/literacy-rich, and technology-infused curriculum initiatives that encourage success for every student;
- Setting clear and measurable expectations for student success while providing ample opportunities for students to have ownership of the learning process;
- Implementing quantitative and qualitative mechanisms to monitor, assess, restructure and improve curriculum and instruction to achieve continuous student improvement annually;
- Providing opportunities for active and genuine involvement of stakeholders (including students, families, teachers, staff, and community partners) within the School in an effort to create richer learning communities that hold all stakeholders accountable for the program's success.

It is anticipated that a standards-based curriculum, proven teaching strategies, and high expectations will benefit students through a systemic approach for teaching the Language Arts and Mathematics Florida Standards (LAFS and MAFS) and the respective Next Generation Sunshine State Standards for other subject areas, as applicable.

Students will earn a positive achievement record as evidenced by student's success on Florida Standards Assessment, other standardized assessments as applicable.

The establishment of the School will provide parents flexibility to choose among, not only diverse educational opportunities within the public school system, but also a high-quality educational option as evidenced by the proven track record of other Somerset schools, including the HP replication school, yielding positive learning outcomes for those students whose parents choose to enroll them.

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

The school promotes 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 specific student body in opening year and thereafter. Student information will be utilized to establish baseline data on each student for an assessment of academic progress and curriculum provided. The student performance and academic achievement data will be utilized to perpetually set goals that ensure and target continuous student improvement. Baseline data will also be used to determine if each student is reading on grade level. Further data will then be used to determine or benchmark each student's gain in reading for every year spent in the School. The School will provide all parents with sufficient information and data on whether their child is reading at grade level and whether the child gains at least a year's worth of learning in a year's time.

Upon accessing data from the state's accountability reports, the School will measure its own progress in meeting the needs of its student population. On an annual basis, the school will gather varied data to develop a *School Improvement Plan* (SIP) as a method of accountability. This plan will detail specific annual measureable goals (AMO) and respective strategies to achieve academic success, and ensure fiscal efficiency (including discussion by various stakeholders to make budget projections and conduct evaluation of all programming efforts, through the SIP document planning process). As a means for aligning responsibility for student's academic success to financial efficiency, the academic programs that are utilized at the School will be re-evaluated, after the appropriate implementation timeframe, and prior to any contract renewals. Additionally, 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.

Among other stakeholders, the School will be accountable to its students and their families and will provide a quality education in a cost efficient and responsible manner. By determining and communicating specific responsibilities to its stakeholders - governing board, staff, students, and parents - the SIP plan will serve as a viable vehicle of continuous school-wide academic and financial success.

- ***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's students will participate in the statewide assessment program created under s. 1008.22. The school will thereby provide parents with assessment results on a yearly basis for each year their child participates in the state assessment including standards assessment and any other district-based examinations. The Department of Education reports student assessment data pursuant to s. 1008.34(3)(c) and the School will, in turn, report the information to each parent of a student at the charter school, the parent of a child on a waiting list for the charter

school, the district, and the governing board of the charter school as well as publish school results on the School website.

The School will also provide its parents with student performance results from the Interim Assessments with specific information regarding their child's progress and learning gains. This means of communication informs parents whether or not their child is reading at grade level and whether or not their child is gaining a year's worth of learning for each year spent at the School.

Through detailed assessment of academic performance using standardized test scores and other assessments the School will:

- Identify students who are below grade level, at grade level, or above grade level; and communicate this to parents through interim progress reports and parent conferences.
- Identify those students not making adequate progress and institute applicable measures for improvement and communicate the intervention strategies and progress of those interventions as described in Sections 1-5 herein; and
- Report student progress throughout the academic school year via a standards-based means of grade assignment for report cards.

Communication regarding student progress will also occur through interim progress reports and report cards. The school will also host parent conferences, open house meetings, parental workshops, as well as coordinate other appropriate methods of communication with parents/guardians, as necessary.

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.***

Within a quality-learning environment, the School will utilize a continuous improvement methodology, wherein student assessment results will offer opportunities for differentiated and targeted instruction, leading to consistent and increased student performance and achievement outcomes.

The School will facilitate a rigorous middle school preparatory curriculum with a wide range of educational resources within a safe learning environment raising the academic achievement of all its students. To meet this goal, the school commits to:

- 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, Social Studies and increase mastery in a second language, providing the means for these students to reach their potential;
- Match or surpass the average student academic performance of similar neighboring public schools in all required public accountability tests; and
- Seek out, establish, and maintain sound, mutually beneficial partnerships to encourage and provide a wide array of educational experiences for students to enjoy continued learning opportunities and find relevance in the "real-world" and beyond the immediate classroom.

Further, this academic plan provides a single, comprehensive plan to improve the academic performance of students. Its use requires the ongoing collection and analysis of student performance data, setting of priorities for program improvements, rigorous use of effective solution strategies, and ongoing monitoring of results. The plan will provide a structured means to improve teaching and learning to meet state content and performance standards, and it is anticipated that the proposed school will be highly effective in improving student learning and academic achievement, as has been the case in the success of its Somerset "sister schools".

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

Reading proficiency is a fundamental need and the basis for assimilation and mastery of all other curriculum to be implemented. Thus, it is of the highest importance to the School and a main focus of the curriculum. As such, the School will utilize the SDIRC Comprehensive Research-Based Reading Plan (CRRP), each teacher will be required to follow the plan and implement with fidelity.

One of the most important aspects of ensuring the success of low performing students is monitoring their academic progress. Once students have been identified as needing multiple levels of intervention following the RtI/MTSS Process and based on the Florida Continuous Improvement Model, instruction shall be modified to address areas of need.

Similar to the school to be replicated, the School will use differentiated instruction and other appropriate measures for targeted instruction, and those students who are not performing at grade level will participate in a data chat to discuss their progress and monitor their growth, as well as participate in individualized goal setting based upon individual student learning needs as evidenced by their individual student performance on annual standardized assessments. Said data will be used on a regular basis to monitor the implementation of reading programs and will include:

- FAIR-FS Assessments
- In-program assessment data (CIRP and SIRP)
- Teacher-made assessments
- District Benchmark Exams
- Differentiated targeted instruction in the six essential components of reading instruction: oral language, phonological awareness, phonics, vocabulary, fluency, and comprehension.

Furthermore, teachers and staff will have training in, and access to, instructional materials to reinforce language arts skills, as has been proven successful at the school to be replicated. Teachers and staff will have training in and access to instructional materials to reinforce literacy skills in all courses. Some of these reinforcements include: Structured Independent Reading, Reciprocal Teaching, Vocabulary Development, CRISS (Creating Independence through Student-owned Strategies), Cooperative Groups, and Graphic Organizers, to name a few. Readers will be placed in appropriate courses when identified to have reading deficiencies.

Intensive Reading - All students who score below required proficiency levels on the FSA for English/Language Arts or are otherwise identified as having deficiencies will receive remediation as specified therein the Sponsor's CRRP. Furthermore, the School commits to readjust guidelines for Intensive Reading placement and/or other such remediation to be implemented, as needed and based on future guidance from the FLDOE/Sponsor.

Moreover, like the school to replicated, the School's curriculum will serve students of all ability levels and aim for mastery of the Florida Standards and applicable NGSSS, as applicable, for all students. Using data from Florida

Standards Assessments (or other state/district mandated assessments), EOC results, as applicable, and other state and district assessments, the School will measure its own collective 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)*. Florida Standards and all applicable NGSSS, as adopted that are not mastered will be identified, and appropriate measures for remediation will be instituted. Students in need of remediation and students with special learning needs will have access to supervised study time and tutoring 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, through honors, and/or enrollment opportunities in applicable high school classes for credit.

- ***Encourage the use of innovative learning methods.***

Much like the Somerset school to be replicated, the school will offer an in-depth advanced curriculum of high school preparatory coursework, wherein a core philosophy focused on students' intellectual and social development will be established. The School will offer a disciplined, balanced, and enriched education of the highest quality, to prepare students for a successful high school and subsequent postsecondary education. The School's educational program is aligned to innovative learning methods and established research-based practices that have proven successful in raising student performance and achievement in other Somerset sister schools, especially at the School to be replicated. These are derived from 17 years of implementation and refinement from new and veteran educators, innovative board members, and commitment from parents and community partners. The innovation is not in the coursework to achieve mastery of Florida Standards but in the variety of instructional methods used by the teachers to deliver effective instruction. The innovation lies in the ability to identify great and original ideas as well as best practices of yesterday and tomorrow and put them into practice. Such practices have resulted in heightened qualities and outcomes of teaching and learning. These include but are not limited to innovative practices such as: the integration of state-of-the-art technology in content areas; real-world experience via hands-on learning and differentiated instruction to serve diverse learners; the organization's "Pull and Push" Model of instruction; implementation of student-driven creative activities and autonomy for teachers in creative lesson planning; and to further foster relationships amongst all stakeholders (See *Section 3 –Educational Program* for detailed activities and strategies).

Much like the Somerset middle school to be replicated, The School's core philosophy is focused on students' intellectual and social development in order to prepare students for a successful high school and subsequently a postsecondary education. Through academic rigor, activities that make curriculum relevant to students' lives, and through relationship building among all stakeholders, Somerset has established a supportive learning community that extends beyond the classroom. Teachers serve as role models, principals serve as mentors, and parents and community members are active volunteers invested in the common mission of promoting student success and molding future leaders. This has allowed the Somerset network to offer a unique learning environment for students that: 1) foster a sense of belonging and an appreciation of their unique talents and skills; 2) reinforces concepts in the classroom through enriching activities and real-world learning experiences; and 3) instills character development through community service programs and volunteerism. Through the replication of this "learning community" model, the school will promote a sense of identity, community, personal integrity and values that prepare students to become effective leaders.

- *Require the measurement of learning outcomes.*

The School will participate in the statewide assessment program created under s. 1003.43, Florida Statutes and will thereby require the measurement of all learning outcomes. The School will use state standardized assessment scores and district and school-based assessments to measure student progress toward mastery of the Florida Standards and NG-SSS across all grade levels, as applicable. The School will implement the Sponsor's testing calendar and measurements, and frequency of assessments therein, as amended from time to time in accordance with district and/or statewide assessments schedule.

In addition to all required state and district assessments, the school will incorporate other measurement tools, such as teacher-made assessments, computer-assisted assessments, expositions, fairs, and other formal and informal means to measure individual student performance, growth as well as school-wide learning outcomes. Based on these various measurements, teachers will modify their instruction, monitor student progress, select appropriate classroom activities, and use assessment results more effectively. These methods will inform teachers of the effectiveness of their teaching, as well as student learning gains in order to ensure continuous progress.

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.*

The School will be open to children in sixth through eighth (approximately 11 to 14 years of age) who qualify to attend a traditional public school within the County. The school will be open to students, as described in 1002.33(10) F.S. who submit 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. If the number of applications falls short of the established capacity, supplemental registration periods may be held for the purpose of reaching student capacity (as further described in Section 13 herein).

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 where the school may be located.

School	FRL Rate	Minority Rate
Rosewood Magnet School	40%	25%
Osceola Magnet School	39%	32%
Beachland Elementary School	40%	39%
Citrus Elementary School	80%	47%
Dodgertown Elementary School	83%	71%
Vero Beach Elementary School	83%	62%
Glendale Elementary School	77%	51%
Indian River Academy	88%	64%
Liberty Magnet School	44%	32%
Treasure Coast Elementary School	69%	35%
Gifford Middle School	56%	46%
Oslo Middle School	72%	51%

The racial makeup of the district was 57.36% White, 16.31% Black or African American, 0.25% Native American, 0.27% Asian, 2.15% from other races, and 3.30% from two or more races. 21.24% of the student population were Hispanic or Latino of any race. One thousand four hundred ninety six (1,496) students are identified as current or former English Language Learners. Sixty-percent of the students are economically disadvantaged (2013-2014 school year Survey 3, Free and Reduced Lunch).

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 admissions policy will be implemented wherein the School will be open to any student residing in the County. 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.

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 articulating from one charter school to another pursuant to an articulation agreement between the charter schools that has been approved by the sponsor.
6. 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 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. . Somerset Academy Inc. has demonstrated during their 16-year track record, to serve a very diverse population. In that period we have served a high population of minority and low-income families. As of 2014, Somerset Academy Inc. serves 84% minority students and 59% free or reduced students. Our program is versatile and ensures all students receive an equitable education as evidenced by the performance of the Somerset schools across Florida.

In order to meet the federally mandated Desegregation Order, the school will openly market enrollment to the entire district as done in all Somerset Academy schools throughout the network. Per 1002.31 (4) School districts

shall adhere to federal desegregation requirements. No controlled open enrollment plan that conflicts with federal desegregation orders shall be implemented by the School.

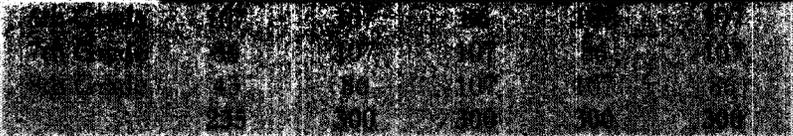
The school will ensure that transportation is not a barrier to equal access within a reasonable distance of the School, as provided in the Florida's Charter School Legislation. In the case transportation is needed and if the parent advises the School that there is a hardship, and he/she is unable to provide the transportation, the School will provide transportation within a defined reasonable distance.

The School may contract with a private transportation carrier to provide specialized transportation for students with disabilities based on their particular student needs which may be specified in a student's IEP. In such case, the School will work with the Sponsor's Transportation Department and provide the Sponsor the name and information of the private transportation firm to ensure compliance with District regulations. You may refer to *Section 15* for The School's Transportation Plan.

The School will strive to mirror the strategies utilized by Indian River County School District to fulfill minority student ratios and expects the student population at the school to mirror the demographics of neighboring public schools.

- 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.**

Students by Grade Enrollment Estimates*

	Year 1	Year 2	Year 3	Year 4	Year 5
					

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

Grades 6-8 up to 22 students per class

*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.**

The student population projections were based upon the CMO's previous successful experience operating multiple Somerset Academy middle school programs throughout Florida, specifically the Somerset Academy South Miami program, the school to be replicated, as well as the demonstrated need in the area for additional choice programs. Somerset schools typically have smaller school environments compared to a traditional elementary/middle school. Somerset will have at a maximum capacity of 300 students for grades 6-8 and will thereby offer a smaller, more

specialized option for the community. As a program successful with raising achievement, especially for educationally disadvantaged (minority and low-income) students, Somerset is a good fit for the area as evidenced by the demographics of neighboring middle schools.

School	Type	FRL Rate	Minority Rate	Title 1	Enrollment	2013 Grade	2014 Grade
Gifford Middle School	Middle	56%	46%	Yes	829	B	C
Oslo Middle School	Middle	72%	51%	Yes	882	C	C

National Trends: The latest data on public charter school enrollment demonstrates that public charter schools are the fastest-growing sector of public education nation-wide. A report released by the National Alliance for Public Charter schools in 2013¹¹¹¹ “*A Growing Movement: America’s Largest Charter School*,” depicts how public charter school enrollment has grown by 80 % over the past 5 years. For the fifth straight year 225,000 more students attended charters compared to the previous year. In Florida, charter school enrollment growth hit 203,000 students in 2012, making it four of the 10 fastest growing charter school populations in the nation.

http://www.publiccharters.org/wp-content/uploads/2014/01/2013-Market-Share-Report-Report_20131210T133315.pdf

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.

The school day shall consist of at least 360 minutes, and all hours of instructional time will be aligned with state and district requirements for grades 6 - 8. It is anticipated the School will operate a seven-period day from 8am - 3pm and maintain a bell schedule similar to the school to be replicated, as follows:

Sample Middle School Daily Schedule				
Description	Start Time	End Time	Length	Frequency
Student Arrival	7:30 AM	7:55 AM	25 mins.	Daily
Period 1 (Homeroom Included)	8:00 AM	9:15 AM	75 mins.	Daily
Passing	9:15AM	9:20 AM	5 mins.	Daily
Period 2 or 3	9:20 AM	11:00 AM	100 mins.	Daily
Passing	11:00 AM	11:05 AM	5 mins.	Daily
Period 4 or 5 (Lunch Included)	11:05 AM	1:15 PM	130 mins.	Daily
Passing	1:15 PM	1:20 PM	5 mins.	Daily
Period 6 or 7	1:20 PM	3:00 PM	100 mins.	Daily

Annual Calendar: The School will follow the annual public school calendar established by the Sponsor, which requires a minimum of at least 180 actual instructional days per school year in accordance with Florida Statute 1011.60(2).

Below is a sample of the Daily Routines at Somerset South Miami, the school being replicated. Somerset will work with Somerset Academy representatives to mimic these daily routines and align them to the new school's hours of operation and to SDIRC requirements to ensure the success of the new school.

Somerset Academy South Miami Middle School

Time	Routine
BEFORE SCHOOL 7:15-8:00	Many teachers arrive early to prepare their day. The majority of teachers offer before school tutoring. (VOLUNTARY AND NOT PAID)
8:00- 8:30 AM	Students arrive and utilize laptops to access the following educational websites as part of their educational curriculum: 1. Reading Plus 2. Mathletics 3. FCAT Science
8:30	Announcements and Homeroom
8:40 THROUGHOUT THE SCHOOL DAY AND THE SCHOOL YEAR.	Instructional Day Begins Teachers utilize a variety of materials and

	<p>follow specific guidelines to facilitate learning.</p> <ol style="list-style-type: none"> 1. All students in grades 3-5 have an assigned laptop. 2. The teachers utilize the Promethean board to teach. 3. Teachers also utilize a Document Camera to model note taking, demonstrate labs in a magnified form, or assist in teaching. 4. All students are provided with the county aligned textbooks. <ul style="list-style-type: none"> ▪ Math- Go Math ▪ Science- Pearson ▪ Social Studies- Social Studies Weekly ▪ Reading- Houghton Mifflin
<p>Teacher Happenings Throughout the Year</p>	<ol style="list-style-type: none"> 1. All teachers follow the Pacing Guides as set by the county and utilize the Florida Standards to ensure all material is taught. 2. There is one lesson plan format that is followed by all teachers. 3. Teachers are given common time planning to meet daily and weekly to discuss grade level matters. 4. Lesson plans are checked on a weekly basis by grade level chairs. 5. Each teacher is responsible for adhering to their schedule to ensure that students receive the amount of instructional time needed per subject. 6. Students are assessed using county assessments and teacher assessments to track their progress. 7. A data binder is maintained by each homeroom teacher. Students meet with the teacher to discuss progress and areas for improvement. 8. Data meetings are conducted school wide to monitor progress from previous years and target students that need more support. 9. A lead teacher attends meetings to gather information as dispersed by

	the county to present to the teachers through professional development.
Interventions for Middle School	A teacher meets with students to reinforce Math and/or Language Arts. These students receive an extra period of instruction by a certified teacher to monitor their progress.

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

Somerset Academy Middle School Vero Beach will replicate Somerset Academy Charter Middle School South Miami's (#13-2007) educational program design wherein excellence and performance drives the teacher's pedagogical efforts, and their commitment to the students manifests itself in all aspects of the school. The School will offer a middle school educational program aligned to the Florida Standards (MAFS and LAFS) and NGSSS, as applicable, and tested via high-quality assessments. The School will establish a cohesive approach to instruction by considering curriculum, assessment and teacher support, within a learning community focus. This approach will be personalized and tailored to all students' abilities and needs. Teacher's will deliver instruction to address the new Florida Standards (MAFS and LAFS) and/or NGSSS in the content areas, as adopted by the state, 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.

As in the replicated school, Somerset will also place a significant focus on technology usage in the classroom and throughout the school. The School understands that technology is a driving force in today's society and current trends lean towards a more technology rich home, work, and school environment therefore technology will be incorporated in the learning process. All teachers will be trained, and students will be guided, to use technology in unique methods to assist in the learning process. The ultimate goal is to maintain traditional and proven effective teaching techniques with modern, innovative contemporary resources.

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, as in the replicated school, intends to develop students' understanding of international and cross-cultural issues as well as their ability to communicate in more than one language. In alignment with the school's mission, the School will implement Spanish and Mandarin foreign language studies, whichever the student and parent choose, for at minimum, the recommended 150 minutes a week.

The Somerset program is aimed at preparing every child for the demands of the 21st Century and the global workforce offering opportunities for every child to reach his/her highest potential as early as Kindergarten. This is done by augmenting the Florida Standards (MAFS and LAFS) and/or NGSSS for the content areas, creating a seamless K-12 curriculum delivered in technology-rich environments, using BEST practices and emphasizing assessment data to differentiate instruction in order to reduce the need for remediation in the later years of each child's educational experience.

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 will be incorporated throughout the curriculum in order to maximize learning and successful attainment of learning objectives:

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 Florida State Standards (MAFS and LAFS) and/or NGSSS. This instruction is structured and based on mastery learning. Monitoring progress through assessments allows teachers to group students based on ability, leading to further differentiated strategies, which identify students who require additional intervention.
- **Scaffolding:** Based on frequent 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, and/or webbing.

Academic Excellence and Leadership Development is in 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 in need of remediation will be identified and "pulled" and students at grade level will be "pushed" to take challenging curriculum to maximize their potential.

Home learning policy: The School expects that all teachers will grade, discuss, and comment on home-learning 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 within other grade levels. 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 (MAFS and LAFS) and/or NGSSS in the content areas, as adopted by the state, 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 Florida Standards (MAFS and LAFS) and/or NGSSS in the content areas, as adopted by the state. 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. Currently, many Somerset Academy, Inc. schools are partnered with dozens of local non-profit organizations that are committed to the educational, social, and person growth of our students. At Somerset Academy South Miami, the school bring replicated, giving back to their community is very important to students at Somerset SoMi. Throughout the year, students participated in various community service projects, including *iPads for Soldiers*, *Pennies for Patients*, *Ronald McDonald House*, the *Amigos for Kids Toy Drive*, and the *South Miami Community Center Thanksgiving Drive*.

The school intends to work with charter high schools in the community to expose students to their options following Somerset Academy.

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 30 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 Association) PTSA 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 academic courses (Language Arts, Writing, Math, Science, Social Studies, Foreign Language) 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 School's educational program is in direct alignment with the school's mission, and moreover supports and facilitates its implementation. The School's philosophy is built on a set of beliefs and values and these serve as the impetus for all student performance and achievement goals and objectives. The educational philosophy and approach are appropriate and likely to result in improved educational performance as proven by the results of the school being replicated.

In accordance with its mission, the School will promote a unique educational program that strives to create bilingual, bi-literate, and bi-cultural students prepared for success in a global society. The required* study of Spanish/Mandarin as a second language is partnered with a challenging curriculum and enhanced by dedicated teachers committed to serving the needs of all students. The use of innovative instructional methods and techniques will be encouraged, ensuring curriculum is effectively taught, even to students with varied learning styles.

*All middle school students will choose a foreign language course as one of the required electives with the exception of students who are enrolled in intensive courses.

Through a sustained commitment to the program on behalf of the Applicant, students will benefit and have positive academic learning outcomes. In turn, the School will maintain:

- high expectations for students and teachers, through delivery of an advanced academic curriculum infused with a target language literacy;
- A robust bilingual and culturally inquisitive curriculum aimed at the mastery of Florida Standards/ NGSSS, as applicable.
- personalized and differentiated instruction and/or targeted tutoring to ensure student's success; and a
- parental involvement obligation that builds the home school relationship and encourages a partnership between parents and the school,

Further, students will understand and appreciate their learning styles; accommodate, plan, and monitor their learning, kindling a desire and fostering ability for lifelong 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 all students, including those labeled low performing students, have success and consistent learning gains thereby engaging in a cycle of continuous improvement.

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.

In order to ensure that all of our learners are reached, programs ranging from technology, to one-on-one interventions will be implemented as they have been in the existing school to be replicated. The school's stakeholders understand and appreciate that all students are individually talented and therefore strive to provide quality services for Students with Disabilities and for English Language Learners.

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:

- Continuous review of curriculum to ensure a year's worth of learning of all state benchmarks research-based instructional practices;
- Differentiated instruction to suit varied 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 throughout the school year;
- Targeted interventions for struggling readers and students performing below grade level (Rti/MTSS Framework)

The school's educational program is contingent upon on state-adopted research-based instructional materials, aligned to the newly adopted Florida Standards and NG-SSS, coupled with high-yield educational strategies to improve student achievement. Therefore, the implementation of this program, with fidelity to all practices and standards described herein, will help all students to attain mastery of state standards.

***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.***

- training to the proposed school's administrators, faculty and staff (*Sections 9 and 11*)
- Adopting common expectations of student behavior and parental involvement (*Section 8*)
- Adopting common Professional Policies and Standards for staff (*Section 10 and 12*)
- Implementing the policies for financial management and oversight proven effective in the existing schools (*Section 18*)
- Providing ongoing communication, training, and support for the school's changing operational needs (*Section 9, 10 and 12*)

Additionally, in order to accurately reflect and commit to replicating the educational programming at Somerset, which is being implemented at the HP school to be replicated; the applicant has committed to employ the following actions:

- Involve the HP school's leadership team in the application and planning processes of the school;
- Assign the High Performing School Site administrator as a mentor to the Somerset principal, to assist with planning and first, and second year implementation of the program. The mentor will be available to meet with the principal frequently and on an as-needed basis for support, mentoring, and coaching services via teleconference, video conference, on-site visits, etc.
- Appoint the HP School site administrator to the interview committee that will select the Somerset principal;
- Guarantee Somerset meets all five AdvancEd/Southern Association Colleges and Schools-Council on Accreditation and School Improvement (SACS-CASI) Standards for schools; and
- Ensure support is provided from not only the replicated school but also from all Somerset schools within the entire network wherein all other leaders serve as mentors to new administrators and everyone shares ownership and accountability in maintaining the thriving, financially viable and academically high performing network of charter schools.

The Somerset System

Somerset has taken advantage of technology in order to link Somerset schools and leaders throughout the country. What makes Somerset Academy, Inc. extraordinary is that there is always a follow-up with personal interaction by the President*, Vice President*, Executive Director of Education*, Governing Board Chairperson, board members, and any other parties that can assist in the development and success of each of the schools. *salaries for these individuals covered by the entity, not the proposed school.

Somerset bridges all the schools together through scheduled leadership telephone chats, use of Somerset Docs, and Somerset programs, such as New Teacher Academy, Professional Development, Coaches Meetings, Principal Leadership Program, Retreats, Conferences, and site-visits. There is always time for the Somerset Inc. Executive Director of Education or one of her fellow leadership colleagues to visit a new or existing Somerset to assist with whatever is needed no matter how near or far. The Education Service Provider, at the request of the board, may also send out experts to lend a hand and to support school initiatives. No Somerset leader ever feels that they are alone. The Executive Director of Education visits each school and performs campus reviews along with the organizations President and Vice President, are assisting with campus reviews to ensure all schools receive the necessary support.

Also bridging the Somerset schools together is the governing board. Although, different states and/or Sponsors (LEA)'s may have different requirements, Somerset ensures that all Somerset's receive the same level of support and guidance.

Many times, already established schools have reached out to Somerset for assistance with educational programming and best practices. They join in with their fellow Somerset colleagues on chats, conferences, professional development, Somerset docs and more. They have access to all of the effective practices and ideology of Somerset. Somerset leaders visit sister schools to observe, share and learn the Somerset educational effective practices. It is truly a collegiate and collaborative group of professionals that make the system work and be successful.

The Somerset district website (<http://www.somersetacademyschools.com>) emphasizes the District's vision, purpose and core principles. From the District website, each individual school's website is accessible to the stakeholders as a means to communicate individual school's programs, services and performance. This website serves as the main source of information for our stakeholders to help them in choosing the best educational path for their child and assuring that their needs are met. In addition, through our governing board meetings, each school presents updates and issues specific to their school. In order to enhance and communicate the vision and purpose, we develop partnerships with surrounding community businesses. Additionally, our District communicates each school's success through advertisements, newsletters, media releases, etc.

Through membership with state and national charter school associations and via attendance at state and national charter school leadership conferences, the school administration and governing board network and collaboratively share with other schools best practices for increased student achievement. These high standards are discussed at ongoing principal meetings and mini-conferences for administrators and instructors that are sponsored by the governing board on employee planning days.

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 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. Like all other Somerset Schools, the School will instill a pre-college mindset, ensuring their success now and preparing them to be ready for the next level. Somerset begins to lay the foundation for this mindset as early as elementary and middle school.

The School's curriculum will focus on clear and measurable expectations for student learning and will address the subject areas of Reading/Language Arts, Mathematics, Social Studies, Science, Foreign Language, Music, Art, Life Skills, Character, and Computer Education. In addition to the core curriculum, curriculum on Anti-bullying, sexting, and internet safety will be incorporated.

Somerset schools meet high standards of student achievement through the delivery of a rigorous and relevant curriculum with emphasis on mastery of benchmarks aligned to the Florida Standards in ELA and Mathematics, literacy standards for science and Social Studies and the Florida NG-SSS, as applicable to course and grade level. Somerset provides all students with a core curriculum of English/language arts (ELA), mathematics, Social Studies, science and a rich array of specials/electives in fine arts, physical education, and world languages, in this case Mandarin and Spanish, curricula. Units of instruction within and across all grade levels provide a vertically articulated curriculum framework that scaffolds the skills and knowledge required for success and concomitantly provides teachers with continuous feedback on student progress.

Somerset's curriculum provides a solid academic foundation for students to have success at the high school level and beyond. Cognitive science research in mathematics and reading underscores the emphasis on meaning and understanding, beginning in the early elementary grades. Thus, much of the curriculum is centered on this approach as well as remediation when necessary. Instruction emphasizes developmental learning while providing differentiated strategies (supports and interventions for struggling students and students with special needs as well as enrichment for advanced learners). The curriculum will continuously reflect high quality instruction and implement research based strategies, innovations and activities that facilitate achievement for all students.

The School will implement the School District of Indian River County *Student Progression Plan** as a vehicle to guide the progression and implementation of the curriculum to be taught and in the manner described herein this petition. Additionally, the School will adopt researched-based district/state-approved instructional materials and *Curriculum Pacing Guides*, if available, or will align the state adopted textbook to serve as the basis and provide the timeline for instruction and to ensure the course material is taught sequentially, consistently and in a challenging format.

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 identified benchmarks;
- collaborative leadership: professional learning communities, shared leadership, and student and staff leadership development;
- personalization: attention to all students, mentoring, and school/community connections;

- curriculum, instruction and assessment: providing access to rigorous coursework, utilizing differentiated instruction techniques and using multiple assessments for data-driven decision making;
- principal evaluation through daily 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 utilized to make instructional decisions and plan interventions;
- weekly grade level and monthly staff meetings;
- ongoing professional development workshops related to student learning and teacher's instruction;
- before and/or afterschool tutoring for remediation and acceleration for students not demonstrating grade level proficiency;
- targeted interventions for struggling readers and students performing below grade level;
- integration of long-term thematic projects across the curriculum;
- multiple ELL and SPED strategies utilized across the curriculum;
- focus on differentiated instruction for varied learning styles; and
- integration of technology across all major disciplines.

The School's curriculum will require students to interact with each other, apply curriculum to real-life situations, and use a variety of technological tools beyond the classroom. Teachers will incorporate various teaching strategies to accommodate all learning styles. In accommodating individual learning styles and needs the School's curriculum incorporates the following instructional practices:

- Interdisciplinary Connections - Curricular decisions will be guided by the aim of 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.
- Vertical and Horizontal Teaming: Horizontal and Vertical Teams exist throughout the School and also throughout the Somerset System, creating opportunities for success in every classroom, because both grade-level and content-area teams work together to align curriculum and instruction and informed continuously by assessment results. The PLCs provide opportunities within the School to engage multiple teaming patterns. For example, PLCs by grade level and PLCs across-disciplinary teams work collaboratively to plan and implement standards-based instruction and connections across content areas, respectively. To further illustrate, in-school curriculum council meets across disciplines, while another active PLC meets by subject area.
- 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:
 - Direct Instruction (lecturing/modeling): this methodology will be used when teachers need to explain or demonstrate specific content and skills. Explicit, systematic instruction will be based on the MAFS, LAFS and/or NGSSS, as applicable. 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, becoming 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, scaffolding, and webbing.
- Behavior Management – 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 based on a positive reward/point 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. The ultimate goal will be to remove these systems from the classrooms, based on the theory that appropriate behaviors will be internalized and external reward systems will no longer be necessary.
 - Accountability - Teachers at the School are required to document instruction of the Language Arts and Mathematics Florida Standards (LAFS and MAFS), Standards for Mathematical Practice; the content area literacy standards, as applicable, and the Next Generation State Standards for the other subject areas, as applicable, In addition, teachers will document ELL and SPED strategies in their daily lesson plans, as well as records of weekly and monthly thematic unit plans. Lesson plans identify specific objectives taught and benchmarks met. Furthermore, teachers are required to maintain a common board configuration in all classes and will be monitored and supported by the administrative team during daily walkthroughs. Lesson plans will be checked weekly and the Principal and admin team member(s) will conduct a daily walk through to ensure that curricular objectives are being taught in accordance with what is documented in each teacher's lesson plan book, respectively.

The School will adopt the SDIRC Digital Classroom Plan. 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 2016.

The District's plan which the school will implement will consider 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.

Curriculum Overview

The following is an overview of the core curriculum program and projected courses and description of the content that will be offered in each of the core subject areas.

English Language Arts

The purpose of the English Language Arts program is to provide instruction for mastery of the Florida standards of ELA, commonly referred to as LAFS (Language Arts Florida Standards) making students college and career ready at the conclusion of their High School career as well as “21st century literate” as evidenced by possessing the skills for creative and/or purposeful expression. Course content for these courses will be delivered in accordance with course descriptions provided by the FL-DOE and will ensure mastery of LAFS as well as the content area literacy standards. Teachers will provide instruction in Language Arts to promote academic excellence in Reading, Writing, Speaking & Listening, and Language. The grade specific LAFS will guide instruction at each grade level and help ensure that students gain adequate exposure to an increasingly complex range of texts and tasks as they progress from grade to grade. The courses will cover the application of the writing process, effective use of speaking and listening and language skills, and higher-order critical thinking and literacy skills in preparation for overall post-secondary studies.

To build a foundation for college and career readiness in language, students must gain control over many conventions of Standard English grammar, usage, and mechanics as well as learn other ways to use language to convey meaning effectively. The School will begin as early as sixth grade to provide students increasingly complex texts to aide student growth in reading comprehension and expose them to increasingly complex vocabulary. Similarly, students will be given writing tasks that engage them 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. Students will also engage in writing - via the writing process – and students will plan, revise, edit, and publish their writing, with the end goal of teaching learners to appreciate that a key purpose of writing is to communicate clearly to an external audience and subsequently they will begin to adapt the form and content of their writing to accomplish a particular task and purpose.

Students will also engage in research projects as a means to develop the capacity to build knowledge on a subject and to respond analytically to literary and informational sources. To meet these goals, teachers will be expected to provide students significant opportunities and time for writing, and producing numerous pieces over short and extended time frames throughout the year. Through Language Arts, students will also be required to develop a range of oral communication and interpersonal skills through whole group discussions as well as individual, partnered and small group presentations. Through these, students learn and engage in: contributing accurate, relevant information; responding to and developing what others have said; making comparisons and contrasts; and analyzing and synthesizing a multitude of ideas through various language arts domains.

Students will be required to successfully complete three middle school annual courses in Language Arts, and emphasize literature, composition, and technical text. English Language Learners will fulfill the requirement by completing the respective M/J Language Arts Through ESOL course at each grade level, respectively (as further described in the ELL section herein this application).

Course Offerings

The following English Language Arts courses will be offered in accordance with the SDIRC Student Progression Plan and with fidelity to FL-DOE Course Descriptions.

Course Name
Grade 6
M/J Language Arts I
M/J Language Arts I Advanced
M/J Language Arts I Advanced Gifted
M/J Language Arts I through ESOL
M/J Reading I
M/J Reading I Advanced
M/J Intensive Reading- Grade 6
M/J Intensive Reading Enrichment
M/J Intensive Reading Plus
Grade 7
M/J Language Arts II
M/J Language Arts II Advanced
M/J Language Arts II Advanced Gifted
M/J Language Arts II through ESOL
M/J Reading II Advanced
M/J Intensive Reading - Grade 7
M/J Intensive Reading Enrichment
M/J Intensive Reading Plus
M/J Creative Writing
Grade 8
M/J Language Arts III
M/J Language Arts III Advanced
M/J Language Arts III Advanced Gifted
M/J Language Arts III through ESOL
M/J Reading III Advanced
M/J Intensive Reading-Grade 8
M/J Intensive Reading Enrichment
M/J Intensive Reading Plus – Grades 6-8

ESOL Course by Proficiency Level
M/J Developmental Language Arts Through ESOL I
M/J Developmental Language Arts Through ESOL II
M/J Developmental Language Arts Through ESOL III
M/J Developmental Language Arts Through ESOL IV

The School will use the state-approved text to differentiate between the regular and advanced curriculum in the area of English Language Arts. The School plans to use state-approved instructional materials, including digital software and multimedia in the instruction of Language Arts. Below are the current materials being used at the replicated school, however the School commits to use these or other digital state-adopted materials in accordance with the district's adoption for 2016 and as approved by the district/state, as follows:

6th-8th grade Language Arts Curriculum Materials:

- CollegeBoard SpringBoard (Online and print materials -Levels from 1-4).

Computer Educational Software Programs:

- Achieve 3000

Reading resources currently include:

- inClass Reader (Jamestown Reading Navigator) by: Mc Graw Hill
- Passport Reading Journeys By: Expanding Learning Voyager
- Reading Plus online
- Accelerated Reader

Intensive Reading* materials will include:

- Comprehensive Intervention Reading Program (CIRP) - Scholastic's Read 180; and
- Supplemental Intervention Reading Program (SIRP) - Achieve 3000,

will provide students with high interest informational and literary texts paired with extension texts focusing on technical and/or vocational literacy skills. The texts are available at varying Lexile levels, and through differentiated reader and task considerations, they support different levels of text complexity.

*The School's text selection will be modified as per the Sponsor's text adoption and modification(s) to the CRRP throughout the duration of the charter.

Intensive Reading

Intensive Reading courses will be in addition to the required Language Arts courses in grades 6-8. All students who score below required proficiency levels on the FSA for English/Language Arts, or are otherwise identified as having deficiencies*, regardless of whether they are fluent, will be placed in the appropriate reading class, as detailed in the Sponsor's CRRP.

*As proficiency levels for the FSA for English/Language Arts have yet to be determined, the School will readjust guidelines for Intensive Reading placement as needed based on future guidance from the FLDOE.

The specific Reading curriculum and reading courses are further described in a subsequent the next question: *A. 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.

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).
- **English I-IV Through ESOL** - content course scheduled by grade level and **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).

Technology in English Language Arts

The School also plans to implement and utilize technology through all disciplines, especially in English/Language Arts, via a real world application methodology. For example, in addition to utilizing Achieve 3000, digital texts, hyperlinks, videos and audio websites such as You Tube - the School may also create a School Tube for instructional purposes. Additionally, the School will also utilize other mediums for students to make their class presentations, develop group forums, communicate with teachers and other students, providing for in-depth, real world application, and multi level sensory application of acquired skills, knowledge, and material. Additionally, through the Broadcasting component, in conjunction with E/LA, the School seeks to implement a Podcast component, building on social media for social change.

Writing

Students will be required to write on a daily basis across the curriculum (i.e. Informative, Persuasive, and Creative Writing). The School recognizes that writing is an integral part of all content areas, and will utilize writing activities as a means to encourage students to think reflectively and analytically as they deepen their understanding of content materials. The School's goal is for students to learn how to write clearly and succinctly and to use textual evidence and evidence-based writing in every content area to survive and thrive in the 21st century.

Each class will be responsible for an on-going writing project that is appropriate to each grade level. 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, to name a few. 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.

Mathematics

The purpose of the Mathematics program is to provide instruction for mastery of the Florida standards of Mathematics, commonly referred to as MAFS (Mathematics Florida Standards) making students high school ready at the conclusion of middle school and college and career ready at the conclusion of their High School career.

Teachers will be expected to use MAFS and the Standards for Mathematical Practice as the framework for developing lesson plans. Teachers will pace instruction using Curriculum Pacing Guides by subject and grade level, when available, and/or will align the state adopted textbook to serve as the basis and provide the timeline for instruction and to ensure the course material is taught sequentially, consistently and in a challenging format. The School will also utilize the replicated schools Comprehensive Mathematics Plan (available through their Sponsor) for essential information. The Plan will also assist the teacher with designing and implementing lessons that teach to the student's natural learning cycle. Additionally, teachers are guided to develop activities that address diverse cultures and learning styles.

Students will be required to successfully complete three middle school annual courses (or higher) in mathematics.

**Grades 6-8 students taking any course designated as a grade 9-12 course will receive high school credit and meet middle grades subject area requirements upon receiving a passing course grade and meeting requirements related to statewide, standardized EOC assessment:

-Middle school students enrolled in Algebra 1 must take and pass the statewide, standardized EOC assessment, which constitutes 30 percent of the student's final course grade.

-Students enrolled in Geometry must take the statewide, standardized EOC assessment, and the results of the EOC assessment must constitute 30 percent of the student's final course grade. Students must pass the course but are not required to pass the EOC assessment to earn high school credit.

The MAFS describe the mathematical skills and concepts all students need for success in college and careers and are organized by grade level in the following domains:

Grade 6

Ratios and Proportional Relationships

The Number System

Expressions and Equations

Geometry

Statistics and Probability

Grade 7

Ratios and Proportional Relationships

The Number System

Expressions and Equations

Geometry

Statistics and Probability

Grade 8

The Number System

Expressions and Equations

Functions

Geometry

Statistics and Probability

The Standards for Mathematical Practice describe the characteristics of mathematically proficient students. These standards describe how students should use mathematics and provide a mechanism through which students engage with and learn mathematics.

Mathematical Practices:

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning for of others.
4. Model with Mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

The Mathematical Practice Standards remain the same at each grade level, however, students will engage with and master new and more advanced mathematical ideas as they progress through each grade level. Accordingly, the Practice Standards will be taught and practiced in conjunction with the Content Standards at each grade level.

Mathematics Course Offerings

The following Mathematics courses will be offered in accordance with the offerings at the replicated school, as follows.

Course Name
6th Grade
M/J Intensive Mathematics
M/J Mathematics I
M/J Mathematics I Advanced
M/J Mathematics I Advanced Gifted
7th Grade
M/J Intensive Mathematics
M/J Mathematics II
M/J Mathematics II Advanced
M/J Mathematics II Advanced Gifted
Algebra I Honors
Algebra I Honors Gifted
Geometry Honors
Geometry Honors Gifted
8th Grade
M/J Intensive Mathematics
M/J Pre-Algebra
Algebra I Honors
Algebra I Honors Gifted
Geometry Honors
Geometry Honors Gifted

The School plans to use state-approved instructional materials, including digital software and multimedia in the instruction of Mathematics, similar to that which is used at the school to replicated. The School will use state-approved texts to differentiate between the regular and honors curriculum in the area of middle grades Mathematics. Advanced and Advanced Gifted Courses will be offered depending on the needs of the student population that the

School will serve, however, the School does commit to offer at least one high school Mathematics course available for middle school students.

The School will use state-approved texts to differentiate between the regular and honors curriculum in the area of Science. The School plans to mirror the science curriculum offerings being utilized and implemented at the Somerset school to be replicated, which has proven effective. Below are the current materials being used at the school to be replicated; the School commits to use these or other digital state-adopted materials as approved by the FL-DOE/Sponsor.

6th Holt McDougal Course 1

7th Hold McDougal Course 2

8th Prentice Hall Algebra I

Technology Supplement for all courses: Triumph Learning – Waggle and BrainPop.

Additional Technology Resources/Supplements:

Technology will also be integrated into the mathematics curriculum to enable students to explore, visualize, solve, and better describe the concepts they are learning. Graphing software, calculators, computers, and interactive white-boards are some of critical technology tools that will be used as part of an effective mathematics program, as applicable. In addition, the School may use specific software to support the teaching and learning of mathematics, such as Mathletics, Algebra Nation, USA Test Prep, Triumph Learning On-line - Waggle, BrainPop, and Gizmos.

The School's text selection for 2016 and beyond may be modified as per the state and district's text adoption and modifications throughout the duration of the charter.

Special Circumstances/Considerations affecting Mathematics coursework:

- **Students below grade level** - If a middle schools student scores at Level 1 or Level 2 on the statewide-standardized assessment in mathematics, then the following year the student must receive remediation, which may be integrated in to the student's required mathematics course.
- **Statewide FSA and Final Exam Grades** - If a student takes a course aligned with an FSA that is not the Algebra I, Geometry, or Algebra II assessment, the student will not receive a final examination grade associated with performance on the FSAs
- **National Assessments and Final Examination Grades:** - If a student takes a course aligned with an Advanced Placement (AP), International Baccalaureate (IB), or Advanced International Certificate of Education (AICE) course that has an aligned, national end-of-year assessment, the student will not receive a final examination grade associated with their performance on the assessment, as provided in the SPP.
- **Statewide EOC Assessments and Final Examination Grades** - All students who take statewide EOC assessments in any entering 9th grade cohort are subject to the following rules concerning the use of statewide assessments as the final examination counting for 30% of the overall course grade. All students associated with the select course codes are required to take the assessment in order to receive a final course grade. If a student does not take the assessment, they will receive no final course grade until the student takes the assessment. If a student retakes a course for any reason , the student will be required to take the statewide assessment aligned to the course to receive their final examination grade for the course. Only the assessment administered during the retaking of the course will be used in the course grade. No process will be used that provides the higher of two or more assessment results to determine

the course grade. All grade forgiveness rules outlined must be followed for a student to be eligible to attempt grade forgiveness in a course.

Science

The purpose of the Science Program is to provide students with a broad knowledge of scientific concepts and establish a solid foundation for students to pursue post-secondary education. The School will deliver a science curriculum that will prepare students to achieve mastery of Science Next Generation Sunshine State Standards (NGSSS) as well as applicable content area literacy standards for the middle grades. NGSSS will provide content standards and the literacy and writing standards to encourage and ensure wide reading from complex texts, therein providing an opportunity for emphasis on text-specific complex questions, and give emphasis on student's supporting answers based upon evidence from text, and provide extensive research and writing opportunities throughout each of the science courses. Students will be required to successfully complete three annual middle school science courses.

Using NGSSS standards for Science, teachers will develop lessons using strategies that incorporate the following

Essential Science Components:

- **Preparing Students for Learning and Prior-Knowledge Assessment** - *"frontloading" to elicit prior knowledge related to real-life experiences and applications.* Strategies: Using graphic organizer, Concept Mapping, KWL, showing a video clip, conducting a demonstration, using literature.
- **Developing Active Learners** - *Students can become active learners by providing opportunities for them to construct their own understanding. These situations should require students to organize, classify, interpret, and draw conclusions about real-life mathematical and scientific problems.* Strategies: Posing open-ended questions, real-life scenarios to solve, or situations requiring higher order thinking skills.
- **Differentiated Instruction** - *A variety of instructional formats will be used in the classrooms to make sense of the content and to construct meanings from new situations. The School will provide opportunities for small-group work, individual exploration, peer instruction, and whole class discussion and inquiry-based instruction.* Strategies: Using scientific laboratory equipment, hands-on activities, and technology-based activities.
- **Integrated Teaching** - *Multi- and interdisciplinary activities should be included within the classroom that provides connections for students. Students must 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.* Strategies: Posing authentic problems to solve; bridging and activities that involve students in critical thinking, process skills, and product development.
- **Critical Thinking and Higher-Order Questioning** - *Use effective, open-ended questioning techniques that encourage student inquiry. Encourage students to pose their own questions, evaluate the information presented, and make informed decisions about the information. Examples would include, "How would you solve a similar situation?" or "What criteria would you use to ...?"* Strategies: Elaborating, analyzing, hypothesizing, and evaluating.
- **Continuous Assessment of the Learning** - *Assessment should reflect how and what is being taught. It should be embedded at various points in the lesson to guide the instructional planning and pacing. There is a clear alignment between curriculum, instruction, and how students are assessed.* Strategies: Using performance tasks, essays, portfolios, video presentations, and demonstrations.

Instruction in Science will provide students with a broad knowledge of scientific concepts. All of the science courses are designed to promote a sense of inquiry through laboratory experiences and to develop critical thinking skills. The courses offer conceptual development in the earth, life, and physical sciences and will cover a gambit of topics therein. However, the School will also emphasize the following topics in the science curriculum:

- Human Growth and Development
- Substance Abuse Education
- Sexually Transmitted Diseases (including HIV/AIDS Education)
- Teen dating violence and abuse prevention
- Bullying Curriculum and Sexting Curriculum
- Internet Safety (Health Education)

Strategies will be implemented to increase awareness of Science programs and initiatives as well as to ensure student success and mastery of Next Generation Sunshine State Standards, the FS Reading Standards for Literacy in Science, and the FS Writing Standards for Science, as follows:

- Commit to hands-on science learning experiences- science teachers will incorporate at least 75 minutes of laboratory experience per week into their instruction;
- Encourage development of science clubs as well as Science/math related honor societies;
- Encourage students to participate in hand-on activities such as those proposed in SECME;
- Allocate time for Science and mathematics teachers to work together to plan the integration of science and mathematics to support the curriculum of their specific courses (e.g. mathematics and science teachers at the School will include meaningful mathematics and science projects that emphasize the content strands and can be incorporated into classroom and home learning assignments);
- Integrate technology and literacy (e.g. CRISS strategies for mathematics and science) as a part of their effective teaching strategies;
- Utilize current research-based programs and high quality materials with documented success; and
- Inform the community and the parents about the curriculum, assessment, and courses necessary to pursue various career options through a Family Math/Family Science and Technology Night.

Science instruction will emphasize the important role science plays in both acquiring a new body of knowledge and mastering a scientific approach to problem solving. Students will be engaged in science inquiry, constructing an understanding of science concepts through their own investigations and analyses using laboratory equipment. Science instruction at the School will be riddled with questions designed to stimulate higher-order thinking by students. Instructors will promote discussion about the increasingly international context of scientific activity, its impact and limitations, and the continuous evolution of scientific knowledge.

Additionally, the School will take an active approach regarding Science instruction. 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

Moreover, students will participate in weekly hands-on science investigations, exposing students to the scientific process and scientific thinking. In grades 6-8, students will be encouraged to participate in Science Clubs where they will be able to explore and investigate the steps to the scientific method.

Curriculum Materials

The School will use state-approved texts to differentiate between the regular and honors curriculum in the area of Science. The School plans to mirror the science curriculum offerings being utilized and implemented at the S

School to be replicated, which has proven effective, including which currently utilizes the following state-approved materials for instruction of Science:

- 6th Grade - Pearson Comprehensive Science 1
- 7th Grade – CPO Foundations of Physical Science
- 8th Grade – Miller and Levine Pearson Biology / EOC Test Prep

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

- Florida Association of Science Teachers
- Scientific magazines such as Science Weekly and National Geographic ce FCAT Resources
- National Institute of Science Education
- National Science Teachers Association
- District Pacing Guides
- Item Specifications
- HOT Labs Documents

Technology: Including but not limited to, GIZMOS, and Brainpop, Discovery Education projectors, smart boards and computer-based programs will assist students visually in understanding science concepts.

Course Offerings

The following Science courses will be offered, similar to that which is offered at the school to be replicated:

Science
6th Grade
M/J Comp Science I
M/J Comp Science I Advanced
M/J Comp Science I Accelerated Honors
7th Grade
M/J Comp Science II
M/J Comp Science II Advanced
Physical Science Honors*
Physical Science Honors Gifted
8th Grade
M/J Comp Science III
M/J Comp Science III Advanced
Physical Science Honors*
Biology I Honors**
Biology I Honors Gifted**

***Senior High School Credit(s) for middle grade students** - Students may enroll in selected senior high school courses for the purposes of pursuing a more challenging program of study. The School will implement the SDIRC Student Progression Plan. To earn high school credit for a Biology I course, a middle school student must take the Biology EOC assessment for 30% of the course grade (or as applicable/mandated and implemented by the FLDOE’s statewide, standardized assessment program).

Social Studies

The purpose of the Social Studies program is to prepare students to be knowledgeable, informed, and active citizens in an increasingly diverse community, nation, and interdependent world. Through Social Studies, the School will seek to promote civic competence and ensure that the values and ideals that have shaped our democratic nation are instilled in our youth. The School will deliver a Social Studies curriculum that will prepare students to achieve mastery of Social Studies NGSSS as well as content area literacy and FS writing standards for middle grades Social Studies. NGSSS will provide content standards and the literacy and writing standards will provide the impetus for students to have wide reading from complex texts, opportunity for emphasis on text-specific complex questions, and emphasis on student supporting answers based upon evidence from text, and provide extensive research and writing opportunities throughout each of the Social Studies courses.

Students will be required to successfully complete three middle school or higher courses in Social Studies, one semester of which must include the study of state and federal government and civics education (the Civics course will require students to complete the Civics EOC exam, which will constitute 30 percent of the student's final course grade (or as applicable/mandated and implemented by the FLDOE's statewide, standardized assessment program)). Furthermore, the Civics course content will include the roles and responsibilities of federal, state, and local governments; the structures and functions of the legislative, executive, and judicial branches of government; and the meaning and significance of historic documents, such as the Articles of Confederation, the Declaration of Independence, and the Constitution of the United States.

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. 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 emphatically.

The comprehensive Social Studies program will:

- emphasize content, concepts, and skills from the Social Studies, 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.

The School will deliver the following Social Studies Course Content, in-line with that which is presented at the replicated school, as follows:

Grade 6 World History (Early Civilizations – The Middle Ages) will range from the world's earliest civilizations to the ancient and classical civilizations of Africa, Asia, and Europe. Students will be exposed to the multiple

dynamics of world history including economics, geography, politics, and religion/philosophy. Students will study methods of historical inquiry and primary and secondary historical documents.

Grade 7 Civics will focus on the principles, functions, and organization of government; the origins of the American political system; the roles, rights, responsibilities of United States citizens; and methods of active participation in our political system. The course is embedded with strong geographic and economic components to support civic education instruction. *Students in 7th grade will obtain 30% of the student final course grade for Civics. This course will culminate in completion of an electronic Personalized Education Planner, which must be signed by the student, the student's guidance counselor, and the student's parent. Accordingly, middle school students will receive instruction in a range of exploratory/elective areas in order to complete the career choices planner.

Grade 8 US History (Exploration – Civil War) will focus on the study of American history from the Exploration and Colonization period to the Reconstruction Period following the Civil War. Students will be exposed to the historical, geographic, political, economic, and sociological events, which influenced the development of the United States and the resulting impact on world history.

So that students can clearly see the relationship between cause and effect in historical events, students will have the opportunity to explore those fundamental ideas and events, which occurred after Reconstruction. Instruction of U.S. History will include opportunities for students to interpret and create representations of historical events using mathematical tables, charts, and graphs. United States History.

The School will also emphasize the following Social Studies topics in the Social Studies curriculum:

- Economic Education;
- African-American History;
- History of the Holocaust;
- Hispanic Contributions to the United States;
- Women's Contributions to the United States;
- Multicultural Education;
- Sacrifices made by veterans in protecting democratic values;
- History and content of the Declaration of Independence and the U.S. Constitution;
- History of the U.S., including the period of discovery, early colonies, the War for Independence, the Civil War, the expansion of the U.S. to its present boundaries, the world wars, and the civil rights movement to the present;
- Florida History, Government, and Geography and
- Character Education

The school will use the NAEP frameworks and district-pacing guides, as available, for United States History as resources and for pacing and instruction.

The School will follow the state course descriptions for the courses listed herein this section. These courses cover concepts and materials that are aligned to the NGSSS, as detailed above. Students will be required to successfully complete the three credits of Social Studies at the Middle School level in Social Studies as mentioned previously in follows: World History, Civics, and U.S. History.

The School will use state-approved texts to mirror that which is successfully offered at the Somerset school to be replicated for the instruction of Social Studies. The School's text selection will be modified as per the Sponsor's text adoption and updates throughout the duration of the charter. The School will also use *Newspapers* as a literacy enrichment supplement and to incorporate data analysis daily by means of graphs and charts, etc.; as well

as will integrate Reading and Writing strategies within the Social Studies curriculum and instructional strategies, Content using content area literacy standards for Social Studies.

6th – 8th Grade Social Studies Materials:

The School will use state-approved texts to differentiate between the regular and honors curriculum in the area of Social Studies. The School plans to mirror the Social Studies curriculum offerings and instructional materials being utilized and implemented at the Somerset School to be replicated, which has proven effective, as follows:

- McGraw-Hill (6th World History –Discovering our past “A history of the world” Also comes with workbook entitled “My Reflections”)
- Civics – (7th Grade - Civics, economics & geography also comes with workbook entitled ‘My reflections on civics”)
- U.S. History –(8th grade - Discovering our past “A history of the United States” also comes with workbook entitled “My reflections on American History”)

Note: The School will also utilize the online version of the McGraw-Hill textbooks and other such resources for teachers.

The following Social Studies courses will be offered, similar to that which is offered at the school to be replicated:

Social Studies
6th Grade
M/J World History
M/J World History Advanced*
M/J World History Gifted*
7th Grade
M/J Civics**
M/J Civics Advanced*
M/J Civics Advanced Gifted*
8th Grade
M/J US History
M/J US History Advanced *
M/J US History Advanced Gifted*

* Advanced and Advanced Gifted Courses will be offered depending on the needs of the student population, as applicable.

** Students in middle school will be required to take the Civics EOC Exam, which will constitute 30 percent of the student’s final course grade.

Career Planning – A semester Internet course in career and education planning will result in a completed personalized academic and career plan for the student. The career/education planning course will:

- emphasize the importance of entrepreneurship skills,
- emphasize technology or the application of technology in career fields; and
- will include information from the Department of Economic Opportunity’s economic security report as described in s. 445.07, F.S.

Foreign Language

The School will use a state-approved World Language textbook, alongside its digital software and multimedia or other state-adopted materials resources in the instruction of Foreign Language. The Foreign Language curriculum will build each student's literacy competence and oral proficiency. These competencies will be achieved through a minimum of 150 minutes of weekly Foreign Language instruction in either Spanish or Mandarin as one of the required* electives at the school, as done in the school to be replicated.

*Students enrolled in intensive courses will not be required to enroll in a foreign language elective.

The School will infuse an exploratory philosophy to learning a second language:

The Five C's of Foreign Language Education

Communication
Cultures
Connections
Comparisons
Communities

Communication - *Communicate in Languages other than English.*

Communication is at the heart of second language study. There are various methods of communication (face-to-face, in writing, or across centuries through the reading of literature).

Cultures - *Gain knowledge and Understanding of Other Cultures.*

Through the study of a second language, a student gains knowledge and understanding of the cultures that use that language. Mastery of the cultural contexts in which the language occurs is necessary to fully master the language.

Connections - *Connect with Other Disciplines and Acquire Information.*

Learning languages provides connections to additional bodies of knowledge that may be unavailable to the monolingual English speaker.

Comparisons - *Develop Insight into the Nature of Language and Culture.*

It is through comparisons and contrasts with the target language, that students develop insight into the nature of language and the concept of culture and realize that there are multiple ways of viewing the world.

Communities - *Participate in Multilingual Communities at Home and Around the World*

The other 4 C's allow students to understand and build multilingual communities at home and around in the world in a variety of contexts and in culturally appropriate ways.

The School expects students to develop their language skills by using the five C's across the disciplines by demonstrating the following standards:

- Engage in conversations, provide and obtain information, express feelings and emotions, and exchange opinions.
- Understand and interpret written and spoken language on a variety of topics.
- Present information, concepts, and ideas to an audience of listeners or readers on a variety of topics.

- Demonstrate an understanding of the relationship between the practices and perspectives of the culture studied.
- Demonstrate an understanding of the relationship between the products and perspectives of the culture studied.
- Reinforce and further their knowledge of other disciplines through the foreign language.
- Acquire information and recognize the distinctive viewpoints that are only available through the foreign language and its cultures.
- Demonstrate understanding of the nature of language through comparisons of the language studied and their own.
- Demonstrate understanding of the concept of culture through comparisons of the cultures studied and their own.
- Use the language both with and beyond the school setting.
- Show evidence of becoming life-long learners by using the language for personal enjoyment and enrichment.

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 afterschool 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

- 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 assist all students in becoming successful, independent, and comprehensive readers by adopting the SDIRC K-12 Comprehensive Core Reading Plan (CCRP) to provide teachers with a systematic framework for literacy instruction. The goal of all instruction is to improve student achievement through mastery of the Language Arts Florida Standards (LAFS) and applicable Literacy standards and writing standards across the curriculum. The

Sponsor's CCRP is aligned with Florida's Formula for Success in reading: 6 + 4 + ii + iii, which includes six (6) components of reading (oral language, phonological awareness, phonics, fluency, vocabulary, and comprehension) + four (4) types of classroom assessments: screening, progress monitoring, diagnosis and outcome measures + (ii) initial instruction + (iii) immediate, intensive interventions.

Please Note: The following section is based on the 2014-2015 CCRP for SDIRC Public Schools as it was the most current plan available at the time of application submission. The School commits to using the SDIRC CCRP in effect for 2016-2017 school year and each year thereafter, throughout the duration of the charter.

The District's Comprehensive Reading Plan supports and provides professional learning aligned with Just Read, Florida's Ten Guiding Principles for Close Reading:

- Make close reading and rereading of texts central to instruction, rather than ancillary.
- Provide scaffolding that does not preempt or replace text.
- Ask text dependent questions from a range of question types.
- Emphasize students supporting answers based upon evidence from the text.
- Provide extensive research and writing opportunities (claims and evidence).
- Offer regular opportunities for students to share ideas, evidence and research.
- Offer systematic instruction in vocabulary.
- Ensure wide reading from complex text that varies in length.
- Provide explicit instruction in applied grammar and conventions.
- Cultivate students' independence.

The School commits to the following requisites, at minimum:

- Leadership at the school level is guiding and supporting the reading initiative;
- The analysis of data drives all decision-making;
- Professional development targeted at individual teacher needs as determined by analysis of student performance data;
- Measurable student achievement goals will be established annually
- Appropriate research-based instructional materials and strategies will be used to address specific student needs.

The Reading Curriculum

The school's reading program will offer a multi-tiered system of supports, including data-based problem solving, utilizing student-centered RtI response to instruction/MTSS intervention 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.

Multi-tiered System of Supports/Response to Intervention Model: MTSS/RtI will be used as a school-wide, multi-level instructional and behavioral system for screening, progress monitoring, data-based decision making for instruction and movement within the multi-level system. The District's MTSS/RtI model will guide the school's RtI/MTSS Team in implementing a tiered approach to instructional delivery that includes fidelity of instruction using a comprehensive core reading program and interventions of increasingly higher intensity, based on the differentiated needs of students. This multi-tiered approach to providing services and interventions to students at

increasing levels of intensity is based on progress monitoring and data analysis. Supplemental reading resources will differentiate instruction for all students across the continuum of Tiers 1 (initial universal), 2 (strategic intervention), and 3 (intensive intervention).

Student Placement: The decision to participate in Intensive Reading course will be made in accordance with the District's CCRP by student's performance on the prior year's Reading FSA and monitored throughout the school year using diagnostic assessments such as baseline assessments in Reading, FAIR-FS Progress Monitoring, and teacher recommendations. The K-12 CCRP requires each school to conduct a screening and diagnostic process to identify appropriate placement of students failing to score at required proficiency levels. The K-12 CCRP also requires a daily double block for all students who have reading deficiencies in decoding and fluency. Some high achieving Level 2 students (Level 2 previously identified by FCAT*) but Level 2 as described herein speaks to students not demonstrating grade level proficiency as per the CCRP. Those "level 2 students" may attend either an Intensive Reading or a homogeneously grouped language arts course, in which the language arts teacher instructs the reading course, while infusing the language arts benchmarks into the course.

All students not demonstrating grade level proficiency will be offered before, after, and possibly Saturday school targeted tutoring.

NOTE - The FSA will be in effect for the 2015-2016 school year and beyond; students in this below proficiency category will be determined according to the FSA for English Language Arts. Moreover, as proficiency levels for the FSA for English Language Arts are more clearly outlined in the in the CCRP and in the future, the School will readjust guidelines for Intensive Reading placement as needed based on future guidance from the FLDOE and as reflected in the Sponsor's future revisions and implementation of the SDIRC CCRP.

Tier 1 (Universal Core Instruction)

- **English Language Arts/Reading Courses**
- **Social Studies and Science** - Literacy instruction in Reading and Writing using the FS

Initial Instruction: Classroom instruction in reading will be offered in uninterrupted block of time of at least 90 minutes duration. The initial lesson from the Comprehensive Core Reading Program (CCRP) usually require 30-40 minutes per day of the required 90-minute uninterrupted reading block. The teacher will then differentiate instruction focusing on individual student needs for the remainder of the reading block. In addition to, or as an extension of the 90-minute reading block, teachers will provide immediate intensive intervention to children as determined by progress monitoring and other forms of assessment..

Tier 2 (Strategic Interventions) and Tier 3 (Intensive Interventions)

Both SIRPs and CIRPs can be used together to meet the needs of struggling readers as part of the instructional continuum of Tier 2 (strategic) and Tier 3 (intensive) intervention.

Comprehensive Intervention Reading Programs (CIRP) will address multiple areas of reading, with the aim of accelerating growth in reading to ultimately achieve, at minimum, grade level proficiency. The CIRP includes instructional content based on the six essential components of reading instruction (oral language, phonological awareness, phonics, fluency, vocabulary and comprehension). CIRPs are used to accelerate growth in reading with the goal of returning students to grade level proficiency. Teachers will place students in intervention programs based on data.

Supplemental Intervention Reading Programs (SIRP) provide instruction in one or more areas of reading. They will be used as part of differentiated instruction and as more intensive interventions to meet student-learning needs in specific areas (phonological awareness, phonics, fluency, vocabulary, and comprehension). They may be used with almost all students in the class in the event that the (CIRP) does not provide enough instruction and practice in a given area for the majority of the students in the class or to provide targeted, intensive interventions for smaller groups of struggling readers. Within these groups students will receive supportive comprehension instruction with scaffolding as necessary that focuses on using grade level text to explicitly address text complexity. The ultimate goal is to have students read grade level text independently.

CIRPs may include:

- Scholastic Read XL (6-8)
- Voyager Journeys (6-8)
- Selected Grade Level Text, Novels – IR-EN (6-8)
- Rewards (6-8)

SIRPS may include:

- The Wilson Reading System (6-8)
- Jamestown Timed Readers (6-8)
- Rewards (6-8)
- National Geographic/Hampton-Brown Edge program (6-8)
- Quick Reads (6-8)
- Selected Grade Level Texts (6-8)
- Novels (6-8)

Technology Resources may include:

- Reading Plus (technology)

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-FS (as applicable), SRI.

Immediate, Intensive Interventions: Students who fail to achieve required proficiency on the FSA for Reading or have otherwise been identified as deficient (i.e. formerly FCAT Levels 1s and 2s) and who have intervention needs in the areas of decoding and/or fluency will have an extended block of reading intervention, either through a double block of intensive reading or by blocking together a class of “Intensive Reading” with another subject area class. This block of time will be taught by the same teacher, and said teacher will be highly qualified in reading or working toward that status (pursuing the reading endorsement or K-12 reading certification). Classroom infrastructure will have appropriate and adequate CIRP and SIRP materials (detailed above) to address the learners’ needs. Furthermore, the reading intervention course will include daily:

- whole group explicit instruction;
- small group differentiated instruction;
- independent reading practice monitored by the teacher;
- infusion of FS in Literacy across the curriculum (specifically in Science, and Social Studies); and
- focus on text complexity aligned to LAFS expectations and matching expected FSA samples.

Instructional Models: Guided by teacher instructions, reading/literacy teachers will model effective reading strategies and guide students through pre-reading, during reading, and post-reading techniques that will strengthen metacognition and self-monitor their own comprehension.

Research based Strategies for Reading Instruction - Based on the research, teachers will use systematic, direct and differentiated instruction in their curriculum delivery while implementing the research-based strategies.*

- *Systematic instruction* will involve a carefully designed sequence plan for instruction. The plan for systematic instruction is carefully thought out, strategic and designed before activities and lessons are developed. Systematic instruction is clearly linked within, as well as across, the six elements of reading instruction (oral language, phonemic awareness, phonics, fluency, vocabulary, and comprehension). For systematic instruction, lessons build on previously taught information, from simple to complex, with clear, concise student objectives that are driven by ongoing assessment. Students are provided appropriate practice opportunities, which directly reflect instruction.
- *Direct instruction* is an instructional approach that utilizes explicit and structured teaching routines. A teacher using direct instruction models, explains, and guides the students through extended practice of a skill or concept until mastery is achieved. The lessons are fast paced, students are academically engaged, and teachers are enthusiastically delivering instruction. Direct instruction is appropriate instruction for all learners, all six components of reading, and in all settings (whole group, small group, and one-on-one).
- *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 settings 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.

*All faculty members must address strategies for reading instruction in their annual Individual Professional Development Plans (IPDP). These strategies must be constantly updated based on the results and analysis of progress monitoring in reading.

Progress Monitoring

Progress monitoring data will be collected regularly and includes student data from classroom assessments and digital tools, classroom “look-fors” using a self-reflection tool or rubric aligned with the literacy needs and discipline specific literacy practices to be implemented, and data collected using teacher evaluations. In addition, district assessments such as the Benchmark Assessment Test and the Florida Assessments for Instruction in Reading, aligned to the Florida Standards (FAIR-FS) will provide progress-monitoring data.

Benchmark Assessment data is monitored after each assessment period to ensure student progress, and progress monitoring data (using FAIR-FS) is monitored three times per year, after each assessment period.

Assessments for Placement and Progress Monitoring:

- FAIR-FS (Three times per year)
- District Benchmark assessments
- Comprehensive English Language Learning Assessment (CELLA) – Required for ESOL
- Diagnostic assessments such as Benchmark Assessments, FAIR-FS, and school-based Benchmark Assessment tests will be used for Screening and Progress Monitoring.
- Outcome measures will be determined through FAIR-FS, end-of unit reading assessments, EOCs and other state-mandated and district-adopted assessment for 2016 and beyond.

The Literacy Leadership Team: 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 for the Literacy Leadership Team (LLT) 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 LLT maintains a connection to the school's MTSS/RtI process by using the problem solving approach to ensure that a multi-tiered system of reading support is present and effective. The Literacy Leadership Team members will include the instructional coach, media specialist, department chairpersons and representation for ELL and ESE.

In accordance with CCRP, the Literacy Leadership Team will:

- Engage in regular, ongoing, literacy professional learning.
- Support the implementation of the Florida Standards for English Language Arts and Literacy standards in Social Studies and Science.
- Support the work of the school's Collaborative Problem Solving Team/Response to Instruction/Intervention.
- Participate in Professional Learning Communities and Study Groups.
- Use data to analyze the effectiveness of instruction and redesign instruction and resources to meet the student's instructional and intervention needs.
- Monitor, and support the implementation of the Comprehensive Intensive Reading Programs and scientifically based reading instruction and strategies with fidelity.
- Participate in ongoing literacy dialogues with school stakeholders.
- Develop and support initiatives that promote career and college readiness and literacy.
- Support classroom or school-based action research.
- Support or participate in classroom demonstrations and modeling of research-based literacy strategies.
- Support the development of model/demonstration classrooms.
- Mentor and support other teachers.
- Lead and support Professional Learning Communities (PLCs), Study Groups, and Lesson Study.
- Present literacy professional development.

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; and
- Encouraging the use of data to improve teaching and thus impact student achievement.

Administrative Support - The administrative team and LLT members will conduct classroom Walkthroughs, 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. The School will identify teachers in need of support and provide assistance through reading coaches, veteran teachers and the LLT members. Language Arts Department Chairs and/or Reading Coaches, as 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 Literacy/Reading Coach, in conjunction with the Literacy 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)

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

Middle School Electives

All electives will follow FLDOE course codes and applicable NGSSS, as well as Reading and Writing Florida Standards related to Technical Subjects, as applicable. Students who are required to take intensive courses (i.e. Intensive Reading and/or Intensive Math), will lose the opportunity to select an elective course while ELL students are required to take a second ESOL course.

The following are some of the elective course options that will be offered to students in grades 6-8 to enhance the curriculum and/or in fulfillment of program and graduation.

Physical Education (PE) - Students will be required to complete the equivalent of one class period per day of physical education for one semester of each year of middle school . This requirement may 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;
OR
- The student is participating in physical activities outside the school day, which are equal to or in excess of the mandated requirement., as stipulated in s. 1003.455, F.S (e.g. afterschool sports, dance classes, physical activity as part of an after school program, etc.)

The School will stress physical fitness and encourage healthful, active lifestyles and encourage all students to participate in physical education. Physical education shall consist of physical activities of at least a moderate intensity level and for duration sufficient to provide a significant health benefit to students, subject to the differing capabilities of students. A certified physical education instructor will review and oversee the physical education program and curricula to be offered.

Some of the PE courses being offered at other Somerset middle schools that may be offered at the School, include the following:

Physical Education	Course Number
Grades 6-8	
M/J Comprehensive PE I	1501100
M/J Comp PE II	1501110
M/J Comp PE III	1501120
M/J Dance 1	0300000
M/J Dance 2	0300010
M/J Dance 3	0300020

Foreign 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. Strong evidence shows that time spent on foreign language study strongly reinforces the core subject areas of reading, English language literacy, Social Studies and math. Foreign language learners consistently outperform control groups in core subject areas on standardized tests, often significantly. (Armstrong & Rogers 1997; Saunders 1998; Masciantonio 1977; Rafferty 1986; Andrade 1989; Kretschmer & Kretschmer 1989). One study found students scored significantly higher in math and language arts after one semester of foreign language study 90 minutes per week (Armstrong 1997). The applicant is hopeful that students will develop an understanding of cross-cultural issues and that some will choose to develop their ability to communicate in more than one language by being part of the school's language program which will require one of their electives to be in either Spanish or Mandarin. Students who are required to take intensive courses (i.e. Intensive Reading and/or Intensive Math), will lose the opportunity to select an elective course while ELL students are required to take a second ESOL course.

Some of the foreign language elective courses being offered at other Somerset schools, including the school to be replicated, that will be offered at the School, include the following:

Foreign Language	Course Number
Grades 6-8	
M/J Spanish, Beginning (Non-Speakers)	0708000
M/J Spanish, Intermediate (Non-Speakers)	0708010
M/J Spanish, Advanced (Non-Speakers)	0708020
Spanish for Spanish Sp I	0709300
Spanish for Spanish Sp II	0709310
Spanish for Spanish Sp III Honors	0709320
Spanish for Spanish Sp I (High School Credit)	0709300
Spanish I (Non Speakers) (High School Credit)	0708340
M/J Chinese Beginning	0707000
M/J Chinese Intermediate	0707010
M/J Chinese Advanced	070720

Other electives that may be offered at the school if applicable

Technology - Instructional technology will enhance the school's curriculum while preparing students to be college and career ready, while reinforcing technology skills necessary for them to meet the demands of new and challenging Florida Standards testing requirements and promoting efficient and responsible use of 21st Century technology.

In an effort to maximize student exposure to the latest technology and comply with new digital instructional material requirements, the School will equip classrooms with multi-media, high-speed computers and other hardware with high-speed Internet access school-wide. In addition to technology used in core and elective courses, the School will apply for grants to provide students access to various technologies (program computers, laptops, iPADS, school-website, SMART/Promethean boards, document cameras, TV production equipment) in order to produce quality academic products and showcase their learning in each content area. Furthermore the School will utilize digital texts, hyperlinks, videos and audio websites such as You Tube, and will in addition create a School Tube for instructional purposes. The School will also utilize other mediums for students to make their class presentations, develop group forums, communicate with teachers and other students, providing for in-depth, real world application, and multi level sensory application of acquired skills, knowledge, and material. Additionally, through the Broadcasting component, and through ELA, the School seeks to implement a Podcast component, building on social media for social change.

The integration of technology throughout the curriculum requires policies are in place to promote safe, ethical, and appropriate use of such technology in compliance with legal and professional standards. Therefore, a policy for the acceptable use of the Internet as a tool for learning will be included in the respective handbooks produced and agreed to by students and their parents that clearly dictate network etiquette guidelines for such use. A similar use policy will be included as a reminder of professional standards regarding appropriate use of technology to which the staff must adhere. The School will adopt an Acceptable Use Policy for the Exploration and Utilization of the Internet as a Tool for Learning. Students and staff will be provided with network etiquette guidelines in their respective handbooks. Faculty and staff will also be reminded of professional standards regarding appropriate use of technology.

Music -The music curriculum includes both vocal and instrumental music. Following the Next Generation Sunshine State Standards for Music, specialists will introduce students to both skills and knowledge of various genres. Skills and techniques will be developed and 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 electives is to provide students an opportunity to develop and explore their creative potentials. The Art curriculum will include planning, developing, and implementing the fine arts as outlined in the Next Generation Sunshine State Standards, or other as applicable. 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.

Some of the other elective courses being offered at other Somerset middle schools and that may be offered at the School based on number of students interested, include the following:

COURSE TITLE
M/J Computer Application in Business I
M/J Computer Application in Business 2
M/J Business Leadership Skills
M/J Business Keyboarding
M/J Personal, Career & School Dev. Skills 1
M/J Business Keyboarding & Career Planning
M/J Art/Art Appreciation 1
M/J Art/Art Appreciation 2
M/J Music Ensemble I
M/J Chorus I
M/J Chorus II
M/J Journalism I (Yearbook)
M/J Journalism II (Yearbook)

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

The effectiveness of the curriculum will be measured by the student performance and achievement and specifically measured against the specific measurable objectives written herein this application (and updated in the SIP) for the first year of operation (as-is further 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 goals and objectives which have been set 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, wherein students will be expected to make annual learning gains toward achieving the Florida Standards (LAFS and MAFS) and the Next Generation Sunshine State Standards, as applicable.

Ongoing monitoring and analysis of school-wide assessment data (as described herein *Section 5*) will assist the School in determining staff development needs, curriculum realignments, and the objectives submitted in the School Improvement Plan (SIP). 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.

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.*

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.

Science

- At least 59% 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 for Science FCAT 2.0 1 to calculate the target for 2017).
- At least 71% 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 for the 2015 Biology 1 EOC to calculate the target for 2017).

Social Studies

- At least 71% 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 for the 2015 Civics EOC to calculate the AMO target for 2017).
- At least 82% 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 for the 2015 US History EOC to calculate the AMO target for 2017).

Customer Service:

- 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.

The School will participate in the statewide assessment program created under s1008.22, F.S. The school will use such state and district-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 Sponsor'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.

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

The School will follow the SDIRC Student Progression Plan to identify the placement and promotion requirements for all students enrolled at the School. This overview of the policies reflects the most current Student Progression Plan (SPP) available at the time of application submission. The School hereby agrees to adopt the SPP in effect for the 2016-2017 school year and as amended for each year of the charter.

Placement:

The School will aim to address the specific needs of learners via an individualized approach for the placement of students in courses beyond the straightforward requirements. The School will consider test scores, academic history, state and district requirements, and teacher recommendations when placing students, always for the benefit of the student and always encouraging students to pursue the most challenging coursework in which he or she can be successful. That is to say, students will be counseled as to course options as well as course recovery options, individually and by a school counselor, who is aware of all options and scheduling nuances, as well as make students aware of the respective anticipated risks versus the rewards of pursuing various course options in terms of advanced and/or recovery coursework.

Promotion Requirements for Students in Grades 6 and 7

To meet promotion requirements from 6th to 7th grade or 7th to 8th grade, students must successfully pass the equivalent of four full-year courses, three of which must be from the areas of English language arts, mathematics, science and Social Studies as stipulated in. s. 1008.25(2)(a-b), F.S.

Promotion Requirements for Students in Grade 8

The requirement to be promoted from eighth grade requires:

- the successful completion of three middle grades (or higher) courses of English, math, science and Social Studies;
- an internet-based semester course in career and education planning in the 6th, 7th or 8th grade, which results in a completed personalized academic and career plan for the student and emphasizes:
 - the importance of entrepreneurship skills,
 - technology or the application of technology in career fields; and
 - include information from the Department of Economic Opportunity's economic security report as described in s. 445.07, F.S. The career plan will:
 - inform students of high school graduation requirements, including a detailed explanation of the diploma

designation options provided under high school assessment and college entrance test requirements, Florida Bright Futures Scholarship Program requirements, state university and Florida college admission requirements, available opportunities to earn college credit in high school, including advanced placement courses, International Baccalaureate, Advanced International Certificate of Education, dual enrollment, including career dual-enrollment; and career education courses including career-themed courses , and courses that lead to industry certification s. 1003.492 or 1008.44, F. S. The student and the student's parent/guardian must sign each student's plan. s. 1003.4156(1)(a)5, F.S.

- For students who fail a required course, course recovery procedures will be according to FDOE guidelines.

Additionally, although successful completion of a high school level Algebra I, geometry, or biology course in middle school is not contingent upon the student's performance on the end-of-course assessment (EOC assessment), students must meet the EOC assessment requirement under s. 1008.22(3)(c)2.a., F.S., in order to earn a high school credit. Students in grades six through eight who earned high school credit for Algebra I. Any students in grade six through eight who takes geometry and biology must take the EOC assessment for 30% of the final course grade to receive high school credit.

Furthermore, academic grades will be assigned based on student mastery of the content of the course, as determined by the teacher using all available data. Teachers will consider all available data to determine the degree of student proficiency in meeting the Language Arts Florida Standards (LAFS), Mathematics Florida Standards (MAFS), and the Next Generation-Sunshine State Standards, as applicable, in addition to mastery of course content as delineated in State of Florida Course Code Descriptions. This data will include standardized test results, progress tests, daily assignments, teacher observation, and other objective information. The determination as to the specific grade a student receives will be based on careful consideration of all aspects of each student's performance during a grading period. Academic grades will be issued in accordance with State and Sponsor guidelines, as specified in the Sponsor's SPP.

When consideration is given to placing students outside of their age appropriate setting through ACCEL (Academically Challenging Curriculum to Enhance Learning), the Principal, teachers and parent will be involved in the decision making process. This process would involve the accumulation of evidence that the student is prepared academically, socially and emotionally for the challenges of that grade. Parent permission is required for Grade Advancement.

Placement Decisions for Students with Disabilities

The general education setting will be the first consideration when determining placement for students with disabilities. To the maximum extent appropriate, core instruction will be delivered in the general education classroom to students with disabilities. The information contained in the student's IEP will form the basis for the placement decision.

Promotion/Retention of ELLs: Promotion and retention for ELLs and ELLs with disabilities will be based on the student's performance in the dominant language while the student is in the process of becoming independent in English. The School's ELL Committee will review and recommend the retention of an ELL student. ELLs who are not meeting district and/or state student performance levels in language arts/reading/ESOL, and/or mathematics and have participated in the ESOL program for more than two consecutive years, must be involved in the school-wide PMP through RtI/MTSS process as delineated in the PMP procedures. ELLs who have participated in the ESOL program for less than two years are to participate in the PMP assessments for monitoring progress only.

Reading proficiency of recently classified ELLs will be assessed following procedures stipulated in the district's K-12 CRRP by the end of the first nine-weeks in an approved ESOL program. For students with disabilities, the IEP will constitute involvement in the school-wide PMP through RtI/MTSS process.

Notwithstanding, 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 will then review the goals and accommodations to address student needs, as appropriate.

- 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.**

N/A

- 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 will be collected by the school upon student registration using reports from previous school records (as applicable) and will include standardized test scores such as Florida Standard Assessments (FSAs), End Course Exams, as applicable, or other performance-based criterion examinations, Benchmark Assessments results, FAIR-FS 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) will 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 will be used as a baseline in the student's incoming year and to track individual student progress from year to year. Data will be compared to current data at the end of each school year. For example, standardized test results from 2015-16 will be compared to results from 2014-15 to determine educational strengths and needs of students as well as to measure the student's academic growth. Ongoing internal audits (e.g. Interim Progress Reports and Report Cards, FAIR-FS Ongoing Assessments) of student performance, will be used to identify the needs and strengths of students throughout the school year.

The baseline student academic achievement levels for the School will be established using multiple measures of student's academic performance at the School and on the Florida Assessment Program examinations, as applicable. Data will be used to determine student strengths and weaknesses and inform instruction in these areas. Some of the assessments to be utilized will include the following:

- Florida Standards Assessments (FSA):
 - English Language Arts - Grades 6-8
 - Mathematics - Grades 6-8
 - Algebra 1 EOC, as applicable
 - Geometry EOC, as applicable
- Statewide Science Assessment, Grade 8
- Civics EOC, Grade 7
- Biology EOC, as applicable

- FAIR-FS (3 times per year);
- Orange County Writes;
- Benchmark Assessments in the following areas:
 - ELA (grades 6-8)
 - Mathematics (grades 6-8)
 - Science (grades 6-8)
 - Algebra I, Geometry, Civics, Biology;
- Other school developed benchmark assessments (school adopted/developed);
- Comprehensive End of Course Exams (CEOC) if applicable; and
- Portfolio assessments (whenever applicable).

The baseline levels of academic achievement established during the first academic year will be compared to academic achievement levels in prior years, when data is available, in order to assess rates of prior academic progress and the baseline rates of academic progress for the School's students. Other than standardized test scores, other baseline data may include report card grades, attendance records, and behavioral records (including in school and out of school suspensions as well as exemplary behavior).

Baseline data will be also be utilized to determine the extent to which educational goals and performance standards have been met (inasmuch as the achievement of the specific measurable objectives identified in the charter school application for the first year of operation). Said baseline data is also 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 will evaluate the effectiveness of their curriculum by determining the extent to which the School meets the annual measurable goals and objectives written herein this petition for the first year of operation and/or specified in the SIP. In subsequent years, the results (based upon those baseline data items) will be gauged against the objectives specified in the School Improvement Plan and this method of goal setting and data collection will be utilized as a living and continuous improvement tool.

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

The School will participate in all required assessments as specified in F.S. 1008.22 . The School will use state standardized assessment scores, district and school-based assessments to measure student progress toward mastery of the Florida Standards in all grade levels.

The School will adopt and implement the Sponsor's Testing Calendar, as amended for 2016-17 and thereafter.

Current Required State and District Assessments include:

- **District Benchmark Assessments** – administered twice a year in the following areas:
 - ELA (grades 6-8)
 - Mathematics (grades 6-8)
 - Science (grades 6-8)
 - Algebra I, Geometry, Civics, Biology;
- **The Florida Assessments for Instruction in Reading, aligned to the Florida Standards (FAIR-FS)** administered 3 times per year for screening, diagnostic and ongoing progress monitoring assessment to measure phonemic awareness, phonics, fluency, vocabulary and comprehension.

- **New Florida Standards Assessments (FSA)** – based on the Florida Standards to assess student mastery in the following areas/grade levels, administered as per the district testing calendar:
 - FSA in English/Language Arts (Grades 6-8)
 - FSA in Mathematics (Grades 6-8)
 - Algebra 1 EOC and Geometry EOC
- **FCAT 2.0 and EOC** – based on the NGSSS to assess student mastery in the following areas/grade levels, administered as per the district testing calendar:
 - Science Grade 8
 - Biology 1 EOC, Civics EOC, and US History EOC Assessments .
- **Comprehensive End of Course Exams (CEOC);**
- **Florida Alternate Assessment (FAA)** will be administered as needed on a one-on-one basis by the student's special education teacher to all students meeting the alternate assessment criteria¹
- **Comprehensive English Language Learning Assessment (CELLA)** – Administered in the Spring annually to all current English Language Learners (ELL) and specified former ELLs to measure students' proficiency and gains in English.

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

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

Expectations are that students will 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 --- will 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 will 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.

¹ Participation in statewide testing programs (i.e. EOC, CELLA, FAIR-FS, etc.) is mandatory for all students, including students with disabilities. Generally, all students with disabilities, including ELLs with disabilities whose instructional program incorporates the general education objectives and competencies, should participate in state assessment programs. The decision regarding whether a student will be exempted or tested with or without accommodations is made by the student's IEP team and recorded on the IEP. Students with disabilities who are exempt from these programs will be assessed through the Florida Alternate Assessment as documented on the IEP. Students with disabilities are also required to take applicable EOC tests one time, after which if the IEP committee determines an EOC assessment cannot accurately assessment results may be waived for the purpose of determining the student's grade and credit.

- 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 will also be assessed by the classroom teacher, and students not making adequate progress towards the *Florida Standards* as evidenced in teacher made evaluations will also be identified, and appropriate measures for improvement will be instituted. Ongoing communication between the School and the parents will be maintained through on-line reporting systems such, web-based grade book (*Gradequick, E-Sembler*) 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, will also be utilized as reflective and guidance tools.

The establishment of a *School Improvement Plan* will ensure school-wide student assessment and performance data can be shared with parents, students and other stakeholders. The SAC Committee for the School will 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, will be detailed in the School's Annual Report, and copies will 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 will 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 will guide students in understanding full mastery of each respective standard and it will keep parents informed about student progress to specific learning objectives.

In addition, students' performance in the classroom will be assessed by the classroom teacher, and students not making adequate progress towards the *Florida Standards* as evidenced in teacher made evaluations will also be identified, and appropriate measures for improvement will be instituted. Ongoing communication between the School and the parents will 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 will 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. These will not be withheld from students because of failure to pay dues, fees or charges for lost or damaged books or property.
- Interim reports:
Not later than 4 weeks into the grading periods, an interim report shall 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 will 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 will 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* will ensure school-wide student assessment and performance data can be shared with parents, students and other stakeholders. The SAC Committee will 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, will be detailed in the School's Annual Report, and copies will 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.*

Supplementary supports and services – Problem Solving team 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 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 may be provided on alternating days (M-W-F, T-TH), split periods (45 minutes in one class, 45 minutes in another), all in 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 the District's IEP Management System, if applicable, 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 PS/RtI 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 Problem Solving Team (PST) for the development and monitoring of Tier 3 interventions.

The PS 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 SST 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 parents over time.

If the focused, evidence-based interventions attempted at all Tiers do not produce a satisfactory level of progress, as evidenced by review of the 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 process. The Sponsor's School Psychologist will periodically conduct fidelity checks on the intervention plan while assisting with progress monitoring data collection.

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 SBT evaluation

If a parent requests that an evaluation be conducted to determine the student's eligibility for specially designed instruction and related services as a student with a disability prior to the implementation of the general education interventions.

1. Within two weeks of receipt of the parent request for evaluation, the school-based team should meet to review existing educational data to determine whether or not there is reason to suspect that the student is a student with a disability

(a) If the school suspects that the student is a student with a disability, the school will obtain written parental consent for evaluation while simultaneously employing the school-based Tier 3 Problem-Solving Team to identify potential areas for intervention and request any additional data needed as part of its process.

(b) If after review of the available data the school does not suspect that the student is a student with a disability, the school-based team making that determination will notify the parent with the procedural safeguards.

2. For students for whom concerns are noted, general education intervention activities including observations in the educational environment, review of existing data, vision and hearing screenings, and evidence-based interventions to address the identified areas of concerns should be implemented and a progress monitoring plan should be developed and implemented to determine the student's response to interventions provided.

3. Any additional assessment/testing needed to assist with intervention selection/design should occur quickly and interventions begun with a plan to review data within 60 days that the student is in attendance at school following the receipt of the consent for evaluation.

4. Concurrent with the general education intervention activities and within 60 days that the student is in attendance at school all other testing/evaluative activities must also be 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.

Evaluation & IEP Timelines

Timelines for Evaluations and IEPs include the following:

- Evaluations used to determine a student's eligibility for services will be completed within 60 days from the date of parental consent
- An IEP will then be developed within thirty (30) calendar days following this and related services and be in effect prior to the provision of these services. (This will not surpass 90 maximum school days from the date of the parental consent for evaluation.
- A meeting shall be held at least annually to review, and revise, as appropriate, each IEP.
- Should a reevaluation be required, it will be completed within 90 days.

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
- 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.
- During the student's eighth grade year or during the school year of the student's 14th birthday, whichever comes first, a statement of whether the student is pursuing a course of study leading to a standard diploma or a special diploma.
- Beginning no later than age fourteen (14), IEP teams shall begin the process of identifying transition services needs of students with disabilities, to include consideration of the student's need for instruction or the provision of information in the area of self-determination to assist the student to be able to actively and effectively participate in IEP team meetings and self-advocate, so that needed postsecondary goals may be identified and in place by age sixteen (16).

Changes to the IEP:

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

1. Any lack of expected progress toward the annual goals and in the general curriculum, if appropriate
2. Results of any reevaluation conducted
3. Information about the student provided to or by the parents
4. The student's anticipated needs or other matters
5. 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.

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.

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 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.

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 detailed in the **SDIRC ESE Policies and Procedures Manual**. 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 the District's Web Based IEP system, if applicable. 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.

Positive Behavioral Interventions: The School commits to using positive behavioral interventions to ensure that SWDs at the School are served in the LRE. Strategies, including positive behavioral interventions and supports to address behavior will be considered in the development of IEP's, especially in the case that a student with a disability demonstrates behavior that impedes their learning or the learning of others. Personnel at the School will initiate functional behavior assessments (FBA), when necessary, for the purpose of identifying target behaviors requiring intervention, as well as analyzing the function of that behavior. Once the behaviors and interventions have been identified, the team will work through the MTSS process for intervening and progress monitoring purposes. From the data collected, a Behavior Intervention Plan will be developed to meet the needs of the student.

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 Problem Solving Team (PST). The PST 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.

E. Describe how the school's effectiveness in serving exceptional education students will be evaluated.

School wide effectiveness in serving exceptional education students will be measured by the subgroups ability to demonstrate learning gains and proficiency rates in a similar manner and pace as the School wide proficiency scores and learning gain rates are evidenced. Additionally, the School expects that the ESE subgroup will meet and/or exceed the district wide proficiency rate of the ESE subgroup, as a means to evidence whether or not the School has been effective in serving the exceptional education students who are enrolled at the School.

Additionally, special education students will demonstrate learning gains consistent with the annual goals specified in the child's IEP. It is expected that students will benefit from a standards-based curriculum that focuses on individualized and differentiated instruction that aims to address their specific learning needs. Data from State, district and school based assessments (baseline, screening, progress monitoring and diagnostics) will be collected and monitored regularly by the ESE and General Education teachers to consistently evaluate and measure growth and determine if modifications or adjustments to instructional strategies or accommodations are needed, and 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 ESE compliance review will also help the School to measure its effectiveness in delivering a quality instructional program to their exceptional education students.

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 School's educational program, allows students to make real-world connections through engaging activities this allows students, including those in special education, entering below grade level to benefit more from both the core and the electives 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 benchmark assessment data. This information, coupled with the results of the prior year standardized tests results and student records, will be used to determine the best educational setting for students (e.g., appropriate course selection, tutoring, etc).

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 high school, college and/or careers. In order to accomplish this, the School will commit to instruction that incorporates supports and accommodations, including²:

²<http://www.corestandards.org/assets/application-to-students-with-disabilities.pdf>

- 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 maintain a culture of rigor and high expectations in alignment with the Florida Standards with appropriate support and differentiation to ensure all students are successful.
- Instructional accommodations, including changes 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 with Florida Standards mastery as the one of major end goals.

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. Students not making adequate progress towards the Florida Standards and NGSSS, as applicable, will be identified and will be given support as follows:

- All students will engage in progress monitoring, however students not demonstrating grade level proficiency will engage in a progress monitoring discussion, aimed at identifying and targeting their deficiencies. The discussion (data chat) will require active participation from the student with their specific teacher(s) in order to ensure the student is made aware of their deficiency and discusses a plan with the teacher for remediation. This initiative will allow each student to have ownership and understating of his/her learning style and allow each student to track and monitor his/her achievement, as well as the School can assist the student, with support from the parent, to determine individualized goals, as well identify strategies and services (tutoring, etc.) to be implemented in order for the student to have the necessary support to be successful).
- 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/English Language Arts classes.
- Morning, Saturday, and daily 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.

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 Indian River County, 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 12% of students with disabilities.

The data was derived from the 2014 LEA Profile published by Florida Department of Education Bureau of Exceptional Education and Student Services.³

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 employ teachers with proper certifications available to serve students with disabilities as projected by an estimated 12% 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 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:

- 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. 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.

I. 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

³ <http://www.fldoe.org/ese/datapage.asp>

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.

Identification of Gifted Students:

The School will follow guidelines and procedures detailed in the SDIRC ESE Policies and Procedures Manual and Rule 6A-6.03019, Special Instructional Programs 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 Standardized Assessment Scores (language in years prior to 2015: FCAT Level 4 or 5 or other state assessment in lieu of FCAT) 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 Problem Solving. 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: a. standardized test scores (A standardized achievement test is administered to students who do not have Stanford Achievement Test or Florida Standards Assessment scores (language in years prior to 2015: FCAT);
 - Classroom performance indicators such as report card grades, class work, and/or projects.
 3. A PST meeting is convened in order to review the information gathered in the student's profile. The PST 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.
 4. 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.
 5. 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.

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 PS Team. The student profile includes the following:

- Gifted Characteristics Checklist (FM 7051) - 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.

A 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 PS Team makes the determination of whether or not to continue the evaluation process,

Student Evaluation Procedures

School District of Indian River County *District Plan to Increase the Participation of Underrepresented Students in the Gifted Program* 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
- Superior intellectual development as measured by an IQ of 119 or above
- To determine the intellectual development of a potentially gifted student, a licensed psychologist will administer an individualized test of intelligence.
- The *Williams Creativity Scale* may be 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.

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 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)
- Whenever appropriate, the student

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 plan.

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 School District of Indian River County 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 as follows:

The district uses the LAS for grades 6-8

The reading and writing test is administered at the same time as the Aural/Oral portion of the test is administered.

*Students will receive ESOL services until otherwise determined by assessment for eligibility.

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 District 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 Studies. 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

Students identified as ELL will be placed in **two** ESOL courses as applicable to the grade level and language proficiency:

1. Language Arts content course scheduled by grade level:

- English Through ESOL 1
- English Through ESOL 2
- English Through ESOL 3
- English Through ESOL 4

2. Language proficiency course scheduled by English Proficiency Level:

- Developmental Language Arts Through ESOL (Level 1 Reading)
- Developmental Language Arts Through ESOL (Level 2 Reading)
- Developmental Language Arts Through ESOL (Level 3 Reading)
- Developmental Language Arts Through ESOL (Level 4 Reading)

Instructional Materials for the Developmental Language Arts through ESOL classes will use state-adopted texts such as National Geographic and Hampton Brown Edge Levels Fundamentals. 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).

The Content-area instructional delivery model will include CCE/ESOL (Curriculum Content in English Using ESOL Strategies). ELL Students may be taught in English in the general classroom with the assistance of an assistant if available. Differentiated instructional ELL leveled materials/programs will be used in the instruction of ELL students. Florida Standards will be the basis of all curriculum instruction. Teachers of ELL students will deliver comprehensible instruction to students using ELL strategies. The instructional services delivered to ELL students are equal in scope, sequence, and quality to those provided to non-ELL students.

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, 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 Marzano's High Yield Strategies, as follows:

- **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, Frontload 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.
 - helping students comprehend textbooks and other written materials.

Assessments - All ELLs participate in statewide and district assessments including CELLA (proficiency exams). 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;
- Assistance in the heritage language (as specified in testing manual for each respective section of test to determine level of assistance);

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. At least one member of the SAC must be an ELL parent or representative.

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 PST/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 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
- 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.

Post Program Review - The School ESOL coordinator/designee with input from classroom teacher(s), and any other applicable staff will be required for conducting follow-up of former ELLs once they have exited the program. Exited student's academic performance in Language Arts/English will be monitored on an on-going basis and Post Program Review updates will be documented by the Language Arts teacher, via the following timeframe:

- At the end of the first grading period after exiting.
- At the end of the first semester after exiting.
- At the end of the first year after exiting.
- At the end of the second year after exiting.

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.

ELL 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. If the student's performance is unsatisfactory, the ESOL coordinator or designee will convene an ELL Committee meeting to determine the reason(s) for the student's lack of progress and to recommend appropriate alternative interventions, including, but not limited to discussion over possible re-entry into the ESOL Program.

B. Identify the staffing plan for the school's English language learner program, including the number and qualifications of staff.

The School will ensure that highly experienced and ESOL certified teachers 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 will have the appropriate training (ESOL endorsement/required coursework including ESOL Issues and Strategies -18, 60, 300 MPP) documentation. The Principal/Staffing Committee will identify each teacher's training status or requirement. 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 expected to appropriately identify any ESOL students and levels in their grade books and use ESOL strategies when instructing ELL students. To that end, the School will comply with the Indian River County Public School system's requirement, as a condition of continued employment, all current personnel take the inservice/course work required in order to be certified to instruct ELLs.

C. Explain how English Language Learners who enter the school below grade level will be engaged in and benefit from the curriculum.

The school will make every effort to offer a balanced approach to engage ELL students in classroom activities with their peers. ELL students who enter below grade level will be provided extra help by receiving lessons using modified language. Realistic goals for the students will be set to assist in raising the ELL student to the appropriate grade level.

Promotion and retention for ELLs and ELLs with disabilities will be based on the student's performance in the dominant language while the student is in the process of becoming independent in English. The School's ELL Committee will review and recommend the retention of an ELL student. ELLs who are not meeting district and/or state student performance levels in language arts/reading/ESOL, and/or mathematics and have participated in the ESOL program for more than two consecutive years, must be involved in the school-wide PMP through RtI/MTSS

process as delineated in the PMP procedures. ELLs who have participated in the ESOL program for less than two years are to participate in the PMP assessments for monitoring progress only.

Reading proficiency of recently classified ELLs will be assessed following procedures stipulated in the district's K-12 CRRP by the end of the first nine-weeks in an approved ESOL program. For students with disabilities, the IEP will constitute involvement in the school-wide PMP through RtI/MTSS process.

Notwithstanding, 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 will then review the goals and accommodations to address student needs, as appropriate.

The School's ELL Committee will also review all ELLs in grade 3 who have been in the ESOL program for less than two years to determine if they may be exempted from the mandatory retention as provided in Section 1008.25(6)(b), F. S. The ELL Committee will be convened for those students recommended for retention only to review each student's progress and to make recommendations for remediation activities.

As noted in above, English Language Learners will be offered strategies to assist in understanding assignments. Strategies to assist ELLs include but are not limited to Marzano's High Yield Strategies.

One example of a strategy used for ELL students below grade level is scaffolding, which can be provided in a variety of ways:

- checking for comprehension of assignments and simplifying the language if necessary
- using visual information to make verbal information clearer
- keeping a dialogue journal that is shared between the teacher and the student, allowing the student to write freely about his life and to read the teacher's responses
- giving the student extra time to complete tests and other exercises that will be assessed, thus taking into account the time needed for language processing
- having the student keep a vocabulary log and allowing him to look up words, when necessary, in a bilingual dictionary
- selectively correcting grammar errors in the student's writing rather than correcting everything so that the student can gradually master the most important grammar points

Teachers of ELL students will also participate in inquiry based activities in a cooperative learning environment that address the topics of:

- Designing effective instruction for ELLs in the mainstream classroom.
- Building and activating background knowledge and creating contexts for meaningful, authentic interaction.
- Identifying comprehensible input in terms of vocabulary and language structures used as well as in terms of literacy abilities.
- Selecting appropriate material that targets a variety of ability and interest levels so that all learners have access to the curriculum.
- Planning for meaningful differentiation of instruction and integration of multiple instructional strategies.

Examine existing assessment procedures and integrate multiple modes of assessment of ELLs in mainstream classroom

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, 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 (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.

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. Tier 1 represents “universal” interventions needed to support student success, Tier 2 consists of “targeted” interventions for specific students requiring greater assistance, and Tier 3 represents “intensive” interventions for those students who do not respond to Tier 1 or Tier 2 strategies.

B. Describe the school’s Code of Conduct, including the school’s policies for discipline, suspension, dismissal and recommendation for expulsion.

In accordance with the School Board of Indian River County Positive Climate and Discipline Code of Conduct, the most appropriate disciplinary action taken by the School’s officials, will be the least extreme measure that can resolve the discipline problem. Teachers and administrators strive to use a variety of informal disciplinary or guidance strategies, prior to, during, and after formal disciplinary action. In order to provide the students with an excellent educational climate the teacher will set classroom expectations. The teacher will create a classroom expectation contract in which the student and the parent will sign acknowledging that they understand what is expected from the student throughout the school year.

The use of corporal punishment, including physical force or physical contact applied to the body as punishment, is prohibited by any member of the School staff and extends to parents or guardians on school grounds. National origin minority or English Language Learners (ELL) students shall not be subjected to any disciplinary action because of the use of a language other than English.

When confronted with an act that may require the imposition of disciplinary action by the School, the student and all other appropriate persons should be given the opportunity to explain the circumstances of the incident. The School will make every effort to inform a parent of disciplinary action prior to the action being taken, if at all possible.

Some of the disciplinary actions that may be utilized (in accordance with the district’s Code of Student Conduct) include:

- Removal from Class
- Student Work Assignment
- Peer Mediation
- Other Alternatives (e.g. after-school detention)

Suspension:

The Principal of the School may suspend a student from school for up to ten days for persistent disobedience and/or gross misconduct (and will assign suspension in accordance with provisions of the discipline matrix of the County). Principals take this action when they have exhausted informal disciplinary strategies, or when they have at least considered those alternatives and rejected them as inappropriate in a given situation.

Outdoor Suspension may be utilized by the School under the following conditions:

- The student’s presence in school presents a physical danger to the student or others; and/or
- The student and/or parent refuse an alternative to suspension.

During a suspension the child will be given the opportunity to complete the work that was missed during the suspension. Failure to make up the assigned work missed during a period of suspension will result in the student being given the academic grade of "F" for those assignments. A suspended student completing assigned work missed during the period of suspension will not be subject to the withholding of passing final grades unless the student has, in addition to suspension, attained five or more unexcused absences in a semester course or ten or more unexcused absences in an annual course. In addition to making up assigned work, the student will be held responsible for the material presented during the student's absence.

Under no circumstances are teachers required to make special provisions to comply with this procedure. The responsibility for securing assignments missed during the suspension period will be that of the student. Upon completion of the makeup work, within a reasonable amount of time, the student should submit the work to the teacher. The teacher must grade and record the makeup work as it is received. Improved effort and conduct by the student are expected, and lack of improvement will be handled by the teacher in an appropriate manner, (e.g., parent conference, lowered effort and/or conduct grades, or referral to administration).

Dismissal or Recommendation for Expulsion:

In accordance with the School District of Indian River County Suspension/Expulsion Policy the School's Principal may request that the Superintendent recommend to the School Board that a student be expelled. The Principal of the School may take this action when he/she has exhausted less severe administrative disciplinary action, or when he/she has considered those alternatives and rejected them as inappropriate in the given situation.

1. When a student commits a serious Code of Student Conduct violation, the principal or designee notifies the parent of suspension and the possibility of expulsion.
2. If expulsion is the recommendation, the principal/school administrator notifies the parent/guardian and the superintendent, of this recommendation in writing. The administrator prepares an expulsion packet and sends it to the Attendance Office.
3. The Director of Student Services chairs the SERT meeting. The school administrator attends the meeting and presents the school information. SERT reviews all information and makes a recommendation to the superintendent regarding an alternative placement or to proceed with expulsion. SERT members may investigate and write reports detailing student history at school, home, and any agency involvement.
4. Following the meeting parents/guardians will be notified by phone of the outcome.
5. The superintendent's office notifies the parent of expulsion proceedings if warranted.
6. If expulsion proceeds, a hearing is held with an impartial hearing officer. The student, parent and the school administration provide testimony. After hearing both sides, the hearing officer will recommend to the superintendent alternative placement or recommend expulsion. The superintendent makes his recommendation to the School Board, which has the final authority to expel.

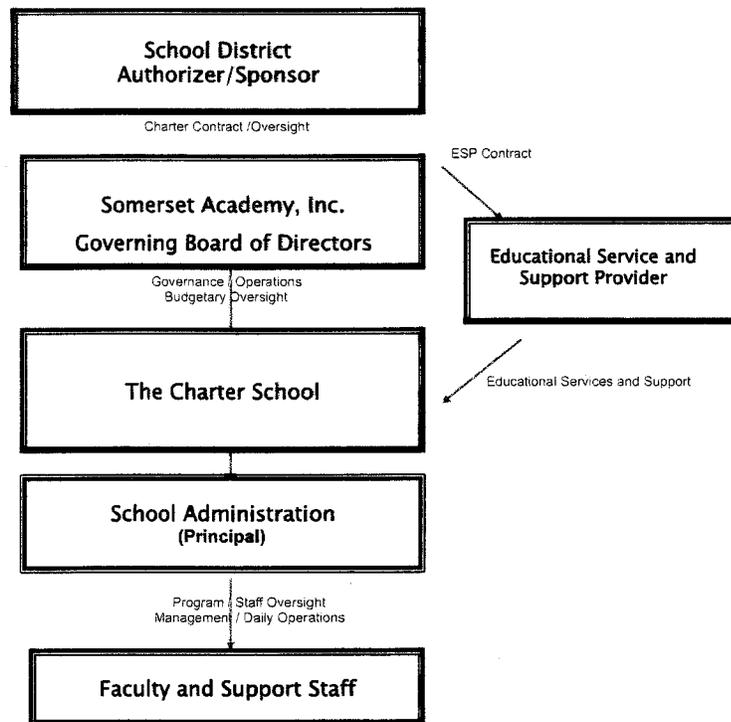
III. ORGANIZATIONAL PLAN

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 and Bylaws* (Appendix A Corporate Documents). 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 4. 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. n/a

H. Name of the contact person at the partner organization and that person's full contact information. n/a

I. A description of the nature and purpose of the school's partnership with the organization. n/a

J. An explanation of how the partner organization will be involved in the governance of the school. n/a

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 enter into a service agreement 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 **SDIRC School Leader 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 below and Appendix B Budget – Staffing Matrix*

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 \$39,500 teacher for Year 1, with a CPI of approximately 2% for every year thereafter.
- Paraprofessionals are budgeted at an average salary of \$ 18,000.
- Substitute teacher costs assumes that substitutes will be hired for 10 days/full-time teacher at a rate of \$110/day.
- Administrative Salaries include a Principal, \$ 85,000
- 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 12% 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 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).

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:

- Recruit teachers through the State-sponsored, *Department of Education, Teach in Florida* website,
- 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 SDIRC Teacher Evaluation Procedures (TEP) Manual 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 MTSS 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.
- Promethean 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.
- Individual Professional Development Plan (IPDP) – 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 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 principal; 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.
- 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 B

Other programs 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

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)⁴:

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 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

⁴ 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.

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.

A 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 IECF-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.

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 MTSS 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.
- Promethean 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.
- Individual Professional Development Plan (IPDP) - 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 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 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 (IPEGS): Training is provided through the District.

- 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.

The Reading Coach, in conjunction with the Literacy 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)

School Instructional Leadership team –consisting of the principal, assistant principal, grade level chairs, ESE and ESOL teachers, Reading Coach and Media Specialist --- will 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 will 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.

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.

Somerset Academy Middle Vero Beach expects to serve a student population reflective of the Indian River County with a higher minority rate than the traditional public schools given the research. The current Somerset Academy, Inc. student population is 12% White, 32% Black, 51% Hispanic, 5% other. In order to meet the federally mandated Desegregation Order, the school will openly market enrollment to the entire district as it is done in all Somerset Academy schools throughout the network.

Their marketing campaign, alongside their lack of zoning boundaries, allows for a more diverse student population. 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 print, broadcast and online media – including minority and community periodicals -- to disseminate information about the school's educational program and open enrollment period.

According to the FLDOE Membership by Race 2013-2014 Study, Indian River's student population by Race reflects approximately 57% White, 16% Black, 1% Asian, and about 21% of the population's ethnicity is Hispanic and about 5% was classified under Other. Close to 94% of the students in Indian River are enrolled in traditional public schools with less than 6% enrolled in private schools. Moreover there is approximately 11% of the population under poverty level in Indian River Country.

Promotional flyers and/or brochures will be distributed 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 will also be posted in local public facilities such as the post office, community centers, libraries and other locations of public access. 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 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 updated on the program's growth and asked to share open enrollment information with their constituents through their newsletter and upcoming community meetings.

In order to be in compliance with the LEA's obligations under its desegregation plan or court order, the School will strive to mirror the strategies utilized by Indian River County School District to fulfill minority student ratios. In addition:

- The school will communicate regularly with the NAACP Education Committee for guidance in both marketing and recruiting.

- The school will schedule to visit pre-schools and day care centers in order to educate all parents and students as to school choice.
- The school will advertise its parent information meetings via various media outlets.
- The school will produce video productions aired on local television highlighting the curriculum and accomplishments of Somerset Academy, Inc. and the opening of the school.

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.

Pupils will be considered for admission without regard to ethnicity, national origin, gender, or achievement level. The school expects to achieve a racial/ethnic balance reflective of the traditional public schools in the school district.

The school's promotional plan aims to reach a broad audience and, accordingly, all racial/ethnic groups within it as described above. 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.

Additionally, a significant effort will be made to bring the ratio of minority teachers in the teaching populations in line with the ratio of minority students in the student population.

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.

Any pupil enrolled in a school of the Indian River County School District for the first time shall be required to present certification of a medical exam performed within one year prior to entry into Florida schools. Certification of immunization is also required from those communicable diseases identified by the Department of Children and Family Services: poliomyelitis, diphtheria, rubella, rubeola, pertussis, mumps, and tetanus. An exemption may be granted as provided in Section 1003.22, Florida Statutes. Any student previously enrolled in a public school outside the State of Florida who seeks admission to school within the District shall be admitted under the same admission requirements established in the state in which the student resided prior to moving to Indian River County.

However, any student who does not present a certification of school entry health examination and immunization within thirty (30) days will be refused attendance in school until the requirement is completed. An exemption may be granted as provided in F.S. 1003.22. A pupil enrolled as an original entry shall present evidence of date of birth as outlined in Section 1003.21, Florida Statutes

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 articulating from one charter school to another pursuant to an articulation agreement between the charter schools that has been approved by the sponsor.
6. 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):

	Student Registration Begins
	Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted.
	Second Registration Period Begins

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 as Appendix E, 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 C - Sample ESP Agreement*. 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.

Additionally, the school seeks to partner with a local charter high school with similar language programs in order to form a partnership in which students will be exposed to the educational options open to them should they seek to further their foreign language studies.

IV. BUSINESS PLAN

Section 14: Facilities

If the site is not acquired:

A. Explain the school's facility needs, including desired location, size, and layout of space.

The Board plans to either lease a facility or engage an experienced charter school facilities developer to acquire, design, plan and construct facilities for lease, which are appropriate to the needs of the School. The School would need a one or multi-story structure built or renovated to meet all requisite codes and life-safety regulations set forth by the applicable governing agency.

Size and Layout of Space: 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 K-5 school facility will include program elements such as traditional classrooms, computer labs, multi-media instructional areas, lunch / multi-purpose room, food prep areas, and indoor and outdoor activity spaces.

In accordance with 1002.33(18)(a)(b) F.S., The school facility will comply with the Florida Building Code pursuant to chapter 553, with the exception of State Requirements for Educational Facilities, the exception of SREF. The school's facility will comply with the Florida Fire Prevention Code, pursuant to s. 633.208. The school has projecting a minimum of 55-60 sq. ft. per student station.

B. Provide an estimate of the costs of the anticipated facility needs and describe how such estimates have been derived.

- o *The financial plan for the proposed school should align with the facilities-related costs described.*

The Governing Board expects that it will enter into a triple-net, long-term lease for the facilities. The Board and the ESP have undertaken several such leases, and have budgeted for anticipated lease and other facilities costs in the financial data provided in **Appendix B**. The Board has obtained confirmation that the budgeted amounts comport with the current forecast of lease conditions.

Estimate of Costs - These Budget projections in **Appendix B** 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.

Lease of Facilities: The amount assumes an average cost of \$900 per student station in the budget, with a 3% increase for CPI. 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 figures are based on statistical expense data compiled from the applicant's other successful charter schools currently operating in Florida. The fees included are comparable to the average annual amounts paid by other charter schools with similar enrollment numbers. 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 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 set at \$2,680/Classroom.

Operations of Facility/Plant includes Purchased Service - CAM (Custodial, fire and alarm, pest control), Property Insurance and Utilities.

C. Explain the strategy and schedule that will be employed to secure an adequate facility.

The Governing Board will direct its ESP to bring to the Board a recommendation for a quality educational facility to be leased by the School.

Projected Schedule

Nov- Dec	- Facility Search
Jan	- Facilities Identification and Negotiations upon charter approval by Sponsoring District
Feb-July	- Execute Lease/Conduct Maintenance and Repairs
July	- Final Preparations of Facilities
July	- Conduct Final Facilities and Safety Inspections

The ESP has extensive experience in identifying facilities and facilities developers, and has successfully assisted other charter school applicants in securing state-of-the-art charter school campuses. The ESP works with reputable and experienced charter property developers, who have access to a network of financial institutions ready to commit the necessary capital for build-to-lease facilities. The developers have also demonstrated abilities in securing the necessary local governmental approvals for charter school purposes and required financing. They have 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.

Safety, Permitting, and Inspections - The facility will meet all requirements for educational facilities in accordance with 1002.33(18)(a)(b) - the Florida Building Code pursuant to chapter 553, with the exception of SREF and state minimum fire protection codes pursuant to Section 633.028, F.S., as adopted by the County. The facility will meet all such requirements for education facilities, including but not limited to, restrooms, fire safety, campus security, air quality control, weather proofing, etc.

The School 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.

D. Describe the back-up facilities plan.

The School's Governing Board expects to finalize negotiations with a potential landlord prior to charter contract negotiations with the Sponsor. If unsuccessful, negotiation will commence immediately with an experienced developer. The Governing Board will require periodic updates from its ESP concerning the progress that is being made in final identification of a suitable site and developer to acquire, construct and lease the facilities. **In the event that issuance of the Certificate of Occupancy is for any reason not expected in a timely fashion, the School's Governing Board intends to direct the ESP to locate alternative facilities options suitable for school use immediately for the Board's review. The Governing Board will require periodic updates from its ESP concerning the progress that is being made in final identification of a suitable facility. Any such facility shall be zoned for educational use and contain the adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency.**

E. Describe the plan and methods the school will employ to comply with Florida's constitutional class size requirements.

The school plans to implement methods, which will ensure that is compliant with Florida's laws relating to class size as it applies to charter schools. For example, the school will ensure that the facilities it occupies are equipped with the number of classrooms needed to accommodate the necessary number of classes. In addition, the school's Board will adopt annual budgets, which include sufficient certified teachers to achieve the student-to-teacher ratios, which are legally applicable.

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.*⁵

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 by section 1002.33, F.S. 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 or who otherwise are entitled to transportation by law. In these situations, the School may provide transportation by contracting with an independent private transportation provider approved by the Sponsor.

Transportation for ESE Students: The School may contract with a Sponsor-approved 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. In such case, the School will provide the Sponsor the name and information of the Sponsor-approved private transportation firm.

Private Providers: 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. 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.

Transportation Plan for Eligible Students: It is the intent of Somerset to provide transportation as previously described in this section and required by law. The proposed budget for the school includes a line item to provide such transportation. In addition, once Somerset has established enrollment for the opening of the school year it will

⁵ 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)

map the residence of each student on a map of Indian River County. The purpose of this map will be to establish pick-up and drop-off points for students in the event that transportation is needed. By clustering the pick-up and drop-off areas as is done in districts across the state Somerset will be able to provide the service in a cost effective manner serving a larger number of students.

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.

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 Healthy, Hunger-Free Kids Act of 2010 and the USDA Dietary Guidelines of meal component and portion size requirements. The school will either prepare its own food in which case the school will have a food service preparation area with all of the necessary equipment for preparing and holding the food or the school will contract with a FDACS registered vendor to provide the food and equipment necessary for holding the food at required temperatures. All meals will be distributed to students using a point of sale accountability procedure.

Somerset Academy, Inc. is an approved Sponsor of the National School Lunch Program (NSLP) and therefore the School will participate in the free/reduced priced meal program. The School will be an approved site under Somerset Academy, Inc. NSLP Sponsorship and will 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.

The School will process all necessary lunch applications; adhere to program operation and record keeping requirements; and use of the Florida Automated Nutrition System (FANS). 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 district mainframe or via direction provided by district;
- 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.

Contracting Services - 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 registered 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 equipment to hold the meals and daily records of all lunches served and current copies of inspection and insurance certificates.

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 B - Budgets

- 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 B - Start Up Budget, Budget Summary, Asset/Liability/Fund Balance Sheet, Revenue Estimate Worksheet

- 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. Additionally, representatives of the charter applicant have attended state and district 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 more than 90 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:

School Design – In this section the number of classrooms and students is presented in four different formats along with the percentage of ESE, ESOL, and students qualifying for free and reduced lunch meals.

Staffing Plan – This section is to provide the calculation for the number of staff members for each position along with the proposed average pay for each position.

FEFP Revenue – These sections are from the Florida Department of Education Revenue worksheet for the 2015-2016 school year. It is used to calculate the gross State Funding. A section is created for each year of the charter. For years 2-4 Revenue Growth is calculated applying a specified growth to each year.

Five Year Budget – The complete five-year budget is presented in this section. For each year of the budget there is a proposed budget enrollment;

The revenues are calculated based on the number of students using the Revenue Worksheet for each year based on the enrollment by grade level, ESE, and ESOL.

- 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 example Student Activities have a cost of \$40.00 and a basis of Student. The budgeted amount would be the cost multiplied by the number of students.
- For salaries the total number of position is presented from the Staffing plan section multiplied by the average pay.
- Expense inflation is set below each year and is calculated throughout the budget.
- The budget is broken up into the different funds conforming to the Red Book format.

Start up Budget – The budgeted amounts of revenue and expenditures before the school’s first fiscal year of operation are presented in this section.

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.

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 has identified a non-profit charter school lender that will provide a line of credit to support the opening expenditure (See Appendix G Lender Commitment Letter)

Startup Budget Expenses: The startup budget expenses as detailed above by object and function are based on the critical expenses for planning and program design and include: marketing efforts for 3 months prior to school opening; office materials and equipment and office computer; and professional services for staff recruitment and professional development.

Balance Sheet

Budget Narrative

Operating Budget Revenue:

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 for each year of the charter in *Appendix B*, 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 “Five Year Budget – Food Services section of the budget.

The capital outlay revenues forecasted from state capital outlay dollars are included in year 1 based on the school having SACS accreditation. In addition, included are the amount of revenue that schools with over 250 students

would receive from the sponsor's 5% allocation, since the 5% fee is applicable to only the first 250 students. The remainder is returned to the school for capital outlay purposes as defined by statute.

Operating Budget Expenditures

Expenses have been forecast using the statistical expense data compiled from over 90 successfully charter schools operating in Florida. The data is highly reliable and every one of more than 90 charter schools that developed budgets using this system this past school year completed the year with a budget surplus.

Staff: 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 Law for class size as it pertains to charter schools (see Staffing Plan in the budget).

Instructional Staff:

- Teacher Salaries were derived at by using an average salary of \$39,500/teacher for Year 1 (According to the Indian River Schools Salary Schedule, this amount is listed as starting salary for a 7/8 year teacher)
 - Teachers include ESOL certified personnel, ESE, Reading/Math Coaches
- Paraprofessionals are budgeted at an average salary of \$18,000/year
- Substitute teacher costs assume that substitutes will be hired for 10 days/full-time teacher at a rate of \$110/day.
- Supplements are calculated at 1% of all instructional salaries

Pupil Personnel Services includes an ESE Teacher/Coordinator (See Appendix D Job Descriptions) and a school nurse

Media Services A Media Specialist is included

School Administration includes a Principal \$85,000 (Years 1-5) and support personnel (see "Staffing Plan" section in the budget).

Other School Administration salaries include those for Assistant Principal, Registrar, Administrative Assistants and other Clerical personnel on as needed basis.

Additional staff includes Food Services staff, Custodian and Security

Employee Benefits are calculated at a rate of approximately 23% (see each function in the "Budget Monthly" section of the budget for exact calculation) of all salaries (excluding contracted services). This includes health insurance costs, 401k contributions, 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).

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 14% 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/ESOL increase due to the various needs of the students once enrolled.

Instructional Materials expenditures include Classroom Supplies and Equipment, Teacher Supplies, digital software and multimedia and Student Activities budgeted at a per student rate.

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.

Instructional Technology includes the purchase of computer equipment/Promethean boards and repairs of such, and educational software and electronic textbooks budgeted per classroom. This amount assumes that the only funding received is FTE, and does not take 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.).

The ESP fees are budgeted by services on a per student basis as follows: Curriculum Development (Curriculum Planning, Research, Development and Evaluation) **\$115.00**, General Administration management **\$225.00**, Fiscal Services (Planning, Research, Development and Evaluation) **\$110.00**.

Staff Development covers costs for workshops and other PD activities, including, but not limited to: Data-Driven Decision Making for Teachers and Administrators: Mission and Vision: Improving Individual Student Achievement: Continuous Improvement Process.

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: Lunch Program expense is based on current figures found in the affiliated charter schools. Somerset Academy, Inc. is already 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 "Five Year Budget --Food Services" section of the budget.

Pupil Transportation Services is calculated at \$265/bus with 40% utilization

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 90 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 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.

Maintenance of Plant: Amount listed is comparable to the average annual amounts paid by other charter schools with similar enrollment numbers

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 B-- Budget Monthly

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.

Fundraising will serve as a catalyst to further service the School's needs. 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, Yearbook Sales, Holiday Store, School Pictures, and a 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, uniform sales, and yearbook sales. The School will also welcome and encourage sponsorship and donations from local business partners within the local community. 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:

- o General Liability Limit - \$1,000,000/\$3,000,000 Deductible: \$0
- o Auto or Hired Non-Owned Auto Liability Limit - \$1,000,000 Deductible: \$0
- o Educators Legal Liability and Employment Practices - Limit: \$1,000,000 Deductible: \$2,500 Aggregate: \$2,000,000
- o Umbrella/Excess Liability Limit: \$10,000,000 Deductible: \$10,000
- o Crime Coverage - Limit: \$1,000,000 Deductible: \$25,000
- o 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 - November	Application Review and Board Interviews
November – December	School Board consideration of Application Facility Search Grant Solicitation
December – February	Contract Negotiations with School District Identifying and securing facility
December - January	Grant Preparation
February	Recruitment of Principal
March 2016	Finalizing curriculum and other instructional materials
March – May	Marketing and Student Recruitment Principal selection and hiring by the Board

May	Initial Recruitment of Faculty and Staff
May 15 th	Student Registration Begins
May 30 th	Student Enrollment Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted.
June 1 st	Second Registration Period Begins 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	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) Finalize Registrations and Master Schedule Teacher fingerprinting, drug-testing, and background checks completed.
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 Academy, Inc. 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 Charles Gibson, Esq to sign as the legal correspondent for the school.

Signature

7/28/15
Date

David Concepcion, Board Chair

Printed Name

Appendices A - G

Appendix A - Corporate Documents

Appendix B - Budgets

Appendix C - Sample ESP Agreement

Appendix D - Job Descriptions

Appendix E - Sample Parent Contract

Appendix F - High Performing School Verification Letter

Appendix G - Lender Commitment Letter

Appendix A - Corporate Documents

**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 4941(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 Bird 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 31 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**

**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 48.091 and Section 607.0501(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 6242 BIRD ROAD, SUITE 31
MIAMI, FL 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 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
ALLIANCE FLORIDA

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



CR18022 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



CR2EO22 (2-95)

Sandra B. Northam

Sandra B. Northam
Secretary of State



10/13/2015

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**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

Somerset Academy Inc.

By Laws
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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 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

Appendix B - Budgets

Somerset Academy Vero Beach - 6-8

Start-up Budget

	[REDACTED]
Line of Credit / Grant **	[REDACTED]
EXPENSES:	
Administration Staff	[REDACTED]
Marketing & Enrollment	[REDACTED]
Computer/Printer	[REDACTED]
Administrative Expenses	[REDACTED]
TOTAL OPERATING EXPENSES	[REDACTED]
Fund Balance	[REDACTED]

** 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 expenditures.

Staffing Plan

Somerset Academy Vero Beach - 6-8

Fringe Benefit Rate	23.00%	
FICA	6.20%	
Medicare	1.45%	
FUTA	\$ 189.00	
SUTA	\$ 189.00	
Workers Comp & Payroll Costs	1.35%	
401K Contribution	2.00%	
Health Insurance per Employee	\$ 4,380.00	\$385 Per month per Employee

Instruction Staff								
Teachers (ESE or ESOL certified teacher)	39,500							
Substitute Teachers	1,100							
Other Teachers (ESE, ESOL, see Budget Narrative)	40,500							
Paraprofessionals	18,000							
Supplements	500							
Pupil Personnel Services								
ESE Teacher/Coordinator	42,000							
Nurse	33,000							
Media Services								
Media Specialist	41,000							
School Administration								
Principal	83,000							
Assistant Principal	65,000							
Administrative Assistant	23,000							
Registrar	21,000							
Other Clerical	15,000							
Fiscal Services								
Business Manager	40,000							
Food Services								
Food Service Workers	14,000							
Operation of Plant								
Custodian	20,800							
Security	20,800							
TOTAL EMPLOYEES		14	10	6	20	20	20	20
Average performance pay increase	2.0%							
Instruction Staff								
Homeroom Teachers								
Substitute Teachers								
Other Teachers (ESE, ESOL, Reading/Math Coaches)								
Paraprofessionals								
Supplements								
	471,118	329,648	228,459	608,983	648,721	851,095	628,717	
Benefits:	108,357	75,794	52,169	139,513	142,408	145,182	149,086	
Pupil Personnel Services								
ESE Teacher/Coordinator								
Nurse								
Benefits:	-	-	-	21,420	43,687	44,571	45,407	
Media Services								
Media Specialist								
Benefits:	-	-	-	4,927	10,050	10,851	10,858	
School Administration								
Principal								
Assistant Principal								
Administrative Assistant								
Registrar								
Other								
Benefits:	54,000	42,500	27,500	110,160	112,363	114,610	116,903	
Fiscal Services								
Business Manager								
Benefits:	12,420	9,775	9,778	25,337	28,044	28,380	28,888	
Food Services								
Food Service Workers								
Benefits:	14,000	14,000	-	14,280	14,568	14,857	15,154	
Operation of Plant								
Custodian								
Security								
Benefits:	3,220	3,220	-	3,284	3,350	3,417	3,485	
Total Payroll & Benefits	663,115	474,829	330,942	951,609	997,515	1,017,465	1,037,814	

Budget Summary

Somerset Academy Vero Beach - 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 *	6,294	6,420	6,548	6,679	6,813
		2.0%	2.0%	2.0%	2.0%

REVENUE

Maximum Gross Revenue (\$)	1,523,183	1,977,324	2,016,871	2,057,208	2,098,352
Enrollment Contingency (\$)	44,059	51,359	52,386	53,434	54,503
Budgeted State Sources of Revenue (\$)	1,479,124	1,925,965	1,964,484	2,003,774	2,043,849

EXPENDITURES

Facility Budget					
Maximum Facility Expense	294,820	410,358	421,346	432,638	444,241
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	83,320	132,258	134,903	137,602	140,354
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	12	15	15	15	15
Salary Benefits per Teacher	9,030	9,301	9,487	9,677	9,870

MAXIMUM FOR OTHER EXPENDITURES	976,196	1,242,501	1,212,878	1,237,117	1,261,927
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* See All Charter School Calculator for Assumptions for the calculation of per pupil FTE

Somerset Academy Vero Beach - 6-8

REVENUES			
State Sources with expected enrollment			FEPF Revenue utilizing the revenue worksheet provided by the FLDOE
Federal Sources - NSLP Funds 60% of students	\$	2.98	60% The reimbursement provided by the National School Lunch Program (NSLP)
Local Sources - Lunch program paid students	\$	3.00	30% The amount per meal for paid lunches
Capital Outlay (Available 1st Year - Advance/Ed Accredited)	\$	215.00	Per Student An estimate of the Capital Outlay amount based on the \$50 million allocated for the 2015-16 school year. The amount is kept constant for each year of the budget. The school is part of an district accredited network.
Other Sources - Services			Revenue from before care/after care, fund raising activities, field trips, and other internal revenue
EXPENDITURES			
Instruction			
Salaries (Includes classroom teachers, contract or hourly, and teacher aides)	See Staffing Plan		Salaries in the staffing plan are for Full Time Equivalent (FTE) instruction positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.
Fringe Benefits			As calculated in the staffing plan
Contracted Professional Services (includes Therapists & other contracted instructional services)	\$	450.00	ESE Student Contracted instructional services as outlined in the application
Classroom Supplies & Equipment	\$	45.00	Student Student Agendas, Classroom Supplies and other items used within the classroom
Teacher Supplies	\$	35.00	Student Supplies for the teacher to outfit the classroom
Textbooks and/or ebooks/Student Activities	\$	185.00	Student Textbooks and other instructional materials as described in the curriculum section of the application
Supplemental instructional materials (CRP/SIRP and Technology)	\$	75.00	Student Other supplemental curriculum as detailed in the application
Digital Education Content Materials (Leased)	\$	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.
Computer - Equipment for Instruction (leased)	\$	1,800.00	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
Sub-Total Instruction			
Pupil Personnel Services			
Salaries (includes counselor, school nurse, health assistant)	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.
Fringe Benefits			As calculated in the staffing plan
Contracted Professional Services (counseling and psychological)	\$	850.00	ESE Student Contracted instructional support services as outlined in the application (eg. ESE Specialist, counselor)
Sub-Total Pupil Personnel Services			
Media Services			
Salaries (includes Librarian)			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.
Fringe Benefits			As calculated in the staffing plan
Sub-Total Media Services			
Curriculum Development			
Salaries (includes Curriculum Specialist)			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.
Fringe Benefits			As calculated in the staffing plan
Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)	\$	115.00	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
Student Activities	\$	15.00	Student
Sub-Total Curriculum Development			
Staff Development			
Workshops/Trainings	\$	1,000.00	Teacher The costs associated with providing staff development as described in the application
Sub-Total Staff Development			
Instruction Related Technology			
Salaries (includes Technology Personnel)			
Fringe Benefits			
EdSoft Software and Scanner	\$	1,200.00	School The costs associated with maintaining the computer hardware. This amount is paid to outside contractors.
Hardware Maintenance	\$	400.00	Classroom
Sub-Total Instruction Related Technology			
Board			
Professional Services (Legal)	\$	2,500.00	School Outside legal expenses
Insurance (General Liability, D&O, Professional Liability)	\$	925.00	Classroom The costs of the Professional Educators Liability policy
Travel	\$	2,000.00	Board Mem The costs for board members to attend meetings and/or conferences
Sub-Total Board			
General Administration			
Management Fees (Portion of the \$450 fee charged by ESP)	\$	225.00	Student The portion of the management fee allocated for General administrative services
Administrative Fee			
Sub-Total General Administration			
School Administration			
Salaries (includes Principal, Secretary & other Office Personnel)			
Fringe Benefits			
Equipment Rental / Lease	\$	300.00	Per Month Office equipment leases
Travel	\$	1,200.00	Administrator Travel expense for the administrative staff to attend meetings and workshops. Expenditures related to the marketing of the school. This amount includes items such as direct mail, banners, etc.
Advertising and Promotion	\$	5.00	Student Annual Government license fees
License Fees	\$	200.00	Costs for subscription services. Membership in the Florida Consortium of Public Charter Schools is included here. The school utilizes the FPCS teacher evaluation system.
Dues and Subscriptions	\$	4.00	Student Postage and overnight mail costs
Postage	\$	50.00	Classroom Printing material and supplies
Printing	\$	225.00	Classroom General office supplies
Office Supplies	\$	25.00	Student Annual costs of the office equipment
Office Equipment	\$	1,500.00	Administrator Annual costs of the administrative computer equipment
Computer Equipment	\$	1,000.00	Administrator
Sub-Total School Administration			

Somerset Academy Vero Beach - 6-8

Facilities Acquisition & Construction			
Building Lease / Rent (see budget summary for calculation)			Facility lease costs as outlined in the budget summary and the facility section of the application
Sub-Total Facilities Acquisition & Construction			
Fiscal Services			
Salaries (Business Manager, Accounting & Bookkeeping Personnel)			Salaries in the staffing plan are for Full Time Equivalent (FTE) fiscal service positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.
Fringe Benefits			As calculated in the staffing plan
Fee to County School Board - up to 250 students			The fee paid to the school district as stipulated in statute
Planning, Research, Development and Evaluation (Part of ESP's Fee)	\$	110.00	The portion of the fee paid to the ESP for providing back office accounting and other fiscal services.
Professional Services - Annual Audit	\$	8,500.00	The costs of the annual audit paid to the outside auditor
Sub-Total Fiscal Services			
Food Services			
Salaries (Food Service Workers)			Salaries in the staffing plan are for Full Time Equivalent (FTE) food service positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.
Fringe Benefits			As calculated in the staffing plan
Food, Materials & Supplies - Vendor provided meals 90% Participation	\$	2.46	Per Meal per day The contract cost per meal paid to an approved NSLP provider
Equipment Rental / Lease (provided by food vendor)	\$		No cost. The equipment is provided by the NSLP provider
Inspection Fees	\$	75.00	Twice per year Health inspection fees
Sub-Total Food Services			
Pupil Transportation Services			
Salaries (Drivers & Transportation workers)			N/A
Fringe Benefits			
Contracted Transportation Services - \$235 per bus per day 40% utilization	\$	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
Sub-Total Pupil Transportation Services			
Operation of Plant			
Salaries (Custodian, crossing guards, security)	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.
Fringe benefits			As calculated in the staffing plan
Purchased Service (Custodial, fire and alarm, etc)	\$	2,500.00	Per Classroom The costs for contracted custodial services and other contracted service for the operation of the facility
Lawn Maintenance	\$	200.00	Per Classroom Contracted lawn service
Pest Control	\$	40.00	Per Classroom Contracted pest service
Security Services	\$	300.00	Per Month Contracted security alarm monitoring
Property Insurance	\$	1,900.00	Per Classroom The expenditure for property insurance including windstorm
Telephone Services	\$	300.00	Per Month Monthly phone service expenses
Water & Sewer	\$	80.00	Per Classroom City Water & Sewer costs
Electricity	\$	2,200.00	Per Classroom The costs electrical service
Sub-Total Operation of Plant			
Maintenance of Plant			
Repairs & Maintenance	\$	1.50	Sq. Ft. Repairs & Maintained of the facility
Supplies	\$		
Sub-Total Maintenance of Plant			
Administrative Technology Services			
Systems Operation	\$	750.00	Per Classroom Contracted costs to maintain the IT infrastructure
Systems Planning & Analysis	\$		
Sub-Total Administrative Technology Services			
Redemption of Principal		0	Repayment of start up loan
Interest (Interest Only at 6%)		0	Interest on start up loan
Sub-Total Debt Service			
Contingency			
Operating expense contingency - 3% of FEPP - Considered restricted funds		3%	

Somerset Academy Vero Beach - 6-8

Asset, Liability, and Fund Balance

Projections	Planning Year	Year 1	Year 2	Year 3	Year 4	Year 5
Assets						
Cash	-	102,546	194,912	314,778	435,113	555,840
Fixed Assets	-					
Total Assets	-	102,546	194,912	314,778	435,113	555,840
Liabilities						
Current Liabilities	-	-	-	-	-	-
Notes Payable	25,000	-	-	-	-	-
Total Liabilities	25,000	-	-	-	-	-
Fund Balance						
Restricted Contingency	-	50,006	116,602	184,474	253,646	324,145
Unrestricted	(25,000)	27,540	78,310	130,304	181,467	231,695
Net Fund Balance	(25,000)	77,546	194,912	314,778	435,113	555,840

Budget Detail

Somerset Academy Vero Beach - 6-8				YEAR 1			YEAR 2	YEAR 3
				Expected	75% Enrollment	50 % Enrollment		
ENROLLMENT		Cost	Basis					
6 - 8	Classrooms			11	8	6	14	14
Total Enrollment				235	177	118	300	300
REVENUES				235	177	118	300	300
State Sources with expected enrollment				\$ 1,479,124.00	\$ 1,114,063.61	\$ 739,562.00	\$ 1,977,324.09	\$ 2,016,870.57
Federal Sources - NSLP funds 60% of students		\$ 2.98	60%	\$ 75,632.40	\$ 56,965.68	\$ 37,977.12	\$ 98,483.04	\$ 100,452.70
Local Sources - Lunch program paid students		\$ 3.00	30%	\$ 38,070.00	\$ 28,674.00	\$ 19,116.00	\$ 49,572.00	\$ 50,563.44
Capital Outlay (Available 1st Year - Advance/Ed Accredited)		\$ 215.00	Per Student	\$ 50,525.00	\$ 38,055.00	\$ 25,370.00	\$ 64,500.00	\$ 64,500.00
Other Sources - Services				\$ 23,500.00	\$ 17,700.00	\$ 11,800.00	\$ 30,000.00	\$ 30,000.00
				\$ 1,666,851.40	\$ 1,255,458.29	\$ 833,825.12	\$ 2,219,879.13	\$ 2,262,386.71
EXPENDITURES								
Instruction								
Salaries (includes classroom teachers, contract or hourly, and teacher aides)		See Staffing Plan		\$ 471,117.50	\$ 329,540.00	\$ 226,558.75	\$ 606,588.90	\$ 618,720.68
Fringe Benefits				\$ 108,357.03	\$ 75,794.20	\$ 52,108.51	\$ 139,515.45	\$ 142,305.76
Contracted Professional Services (includes Therapists & other contracted instructional services)		\$ 450.00	ESE Student	\$ 12,690.00	\$ 9,558.00	\$ 6,372.00	\$ 16,524.00	\$ 16,854.48
Classroom Supplies & Equipment		\$ 45.00	Student	\$ 10,575.00	\$ 7,965.00	\$ 5,310.00	\$ 13,770.00	\$ 14,045.40
Teacher Supplies		\$ 35.00	Student	\$ 8,225.00	\$ 6,195.00	\$ 4,130.00	\$ 10,710.00	\$ 10,924.20
Textbooks and/or ebooks/Student Activities		\$ 185.00	Student	\$ 43,475.00	\$ 32,745.00	\$ 21,830.00	\$ 56,610.00	\$ 28,871.10
Supplemental instructional materials (CIRP/SIRP and Technology)		\$ 75.00	Student	\$ 17,625.00	\$ 13,275.00	\$ 8,850.00	\$ 22,950.00	\$ 23,409.00
Digital Education Content Materials (Leased)		\$ 150.00	Student	\$ 35,250.00	\$ 26,550.00	\$ 17,700.00	\$ 45,900.00	\$ 46,818.00
Computer - Equipment for Instruction (leased)		\$ 1,800.00	Classroom	\$ 19,800.00	\$ 14,400.00	\$ 10,800.00	\$ 25,704.00	\$ 26,218.08
Sub-Total Instruction				\$ 727,114.53	\$ 516,022.20	\$ 361,159.26	\$ 938,272.35	\$ 928,166.69
Pupil Personnel Services								
Salaries (includes counselor, school nurse, health assistant)		See Staffing Plan		\$ -	\$ -	\$ -	\$ 21,420.00	\$ 43,696.80
Fringe Benefits				\$ -	\$ -	\$ -	\$ 4,926.60	\$ 10,050.26
Contracted Professional Services (counseling and psychological)		\$ 850.00	ESE Student	\$ 23,970.00	\$ 18,054.00	\$ 12,036.00	\$ 31,212.00	\$ 31,836.24
Sub-Total Pupil Personnel Services				\$ 23,970.00	\$ 18,054.00	\$ 12,036.00	\$ 57,558.60	\$ 85,583.30
Media Services								
Salaries (includes Librarian)				\$ -	\$ -	\$ -	\$ -	\$ -
Fringe Benefits				\$ -	\$ -	\$ -	\$ -	\$ -
Sub-Total Media Services				\$ -	\$ -	\$ -	\$ -	\$ -
Curriculum Development								
Salaries (includes Curriculum Specialist)				\$ -	\$ -	\$ -	\$ -	\$ -
Fringe Benefits				\$ -	\$ -	\$ -	\$ -	\$ -
Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)		\$ 115.00	Student	\$ 27,025.00	\$ 20,355.00	\$ 13,570.00	\$ 35,190.00	\$ 35,893.80
Student Activities		\$ 15.00	Student	\$ 3,525.00	\$ 2,655.00	\$ 1,770.00	\$ 4,590.00	\$ 4,681.80
Sub-Total Curriculum Development				\$ 30,550.00	\$ 23,010.00	\$ 15,340.00	\$ 39,780.00	\$ 40,575.60
Staff Development								
Workshops/Trainings		\$ 1,000.00	Teacher	\$ 12,000.00	\$ 8,000.00	\$ 5,500.00	\$ 15,000.00	\$ 15,000.00
Sub-Total Staff Development				\$ 12,000.00	\$ 8,000.00	\$ 5,500.00	\$ 15,000.00	\$ 15,000.00

Somerset Academy Vero Beach - 6-8			YEAR 1			YEAR 2	YEAR 3
			Expected	75% Enrollment	50 % Enrollment		
Instruction Related Technology							
Salaries (includes Technology Personnel)			\$ -	\$ -	\$ -	\$ -	\$ -
Fringe Benefits			\$ -	\$ -	\$ -	\$ -	\$ -
EduSoft Software and Scanner	\$ 1,200.00	School	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,224.00	\$ 1,248.48
Hardware Maintenance	\$ 400.00	Classroom	\$ 4,400.00	\$ 3,200.00	\$ 2,400.00	\$ 5,712.00	\$ 5,826.24
Sub-Total Instruction Related Technology			\$ 5,600.00	\$ 4,400.00	\$ 3,600.00	\$ 6,936.00	\$ 7,074.72
Board							
Professional Services (Legal)	\$ 2,500.00	School	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,550.00	\$ 2,601.00
Insurance (General Liability, D&O, Professional Liability)	\$ 925.00	Classroom	\$ 10,175.00	\$ 7,400.00	\$ 5,550.00	\$ 13,209.00	\$ 13,473.18
Travel	\$ 2,000.00	Board Mem	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,040.00	\$ 2,080.80
Sub-Total Board			\$ 14,675.00	\$ 11,900.00	\$ 10,050.00	\$ 17,799.00	\$ 18,154.98
General Administration							
Management Fees (Portion of the \$450 fee charged by ESP)	\$ 225.00	Student	\$ 52,875.00	\$ 39,825.00	\$ 26,550.00	\$ 68,850.00	\$ 70,227.00
Administrative Fee							
Sub-Total General Administration			\$ 52,875.00	\$ 39,825.00	\$ 26,550.00	\$ 68,850.00	\$ 70,227.00
School Administration							
Salaries (includes Principal, Secretary & other Office Personnel)			\$ 54,000.00	\$ 42,500.00	\$ 42,500.00	\$ 110,160.00	\$ 112,363.20
Fringe Benefits			\$ 12,420.00	\$ 9,775.00	\$ 9,775.00	\$ 25,336.80	\$ 25,843.54
Equipment Rental / Lease	\$ 300.00	Per Month	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,672.00	\$ 3,745.44
Travel	\$ 1,200.00	Administrator	\$ 600.00	\$ 600.00	\$ 600.00	\$ 612.00	\$ 624.24
Advertising and Promotion	\$ 5.00	Student	\$ 1,175.00	\$ 885.00	\$ 590.00	\$ 1,530.00	\$ 1,560.60
License Fees	\$ 200.00		\$ 200.00	\$ 200.00	\$ 200.00	\$ 204.00	\$ 208.08
Dues and Subscriptions	\$ 4.00	Student	\$ 940.00	\$ 708.00	\$ 472.00	\$ 1,224.00	\$ 1,248.48
Postage	\$ 50.00	Classroom	\$ 550.00	\$ 400.00	\$ 300.00	\$ 714.00	\$ 728.28
Printing	\$ 225.00	Classroom	\$ 2,475.00	\$ 1,800.00	\$ 1,350.00	\$ 3,213.00	\$ 3,277.26
Office Supplies	\$ 25.00	Student	\$ 5,875.00	\$ 4,425.00	\$ 2,950.00	\$ 7,500.00	\$ 7,500.00
Office Equipment	\$ 1,500.00		\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ 1,530.00	\$ 1,560.60
Computer Equipment	\$ 1,000.00	Administrator	\$ 500.00	\$ 500.00	\$ 500.00	\$ 510.00	\$ 520.20
Sub-Total School Administration			\$ 83,835.00	\$ 66,893.00	\$ 64,337.00	\$ 156,205.80	\$ 159,179.92
Facilities Acquisition & Construction							
Building Lease / Rent (see budget summary for calculation)			\$ 211,500.00	\$ 159,300.00	\$ 105,750.00	\$ 278,100.00	\$ 286,443.00
Sub-Total Facilities Acquisition & Construction			\$ 211,500.00	\$ 159,300.00	\$ 105,750.00	\$ 278,100.00	\$ 286,443.00
Fiscal Services							
Salaries (Business Manager, Accounting & Bookkeeping Personnel)			\$ -	\$ -	\$ -	\$ -	\$ -
Fringe Benefits			\$ -	\$ -	\$ -	\$ -	\$ -
Fee to County School Board - up to 250 students			\$ 73,956.20	\$ 55,703.18	\$ 37,135.45	\$ 80,248.54	\$ 81,853.51
Planning, Research, Development and Evaluation (Part of ESP's Fee)	\$ 110.00		\$ 25,850.00	\$ 19,470.00	\$ 12,980.00	\$ 33,660.00	\$ 34,333.20
Professional Services - Annual Audit	\$ 8,500.00		\$ 8,500.00	\$ 8,500.00	\$ 8,500.00	\$ 8,670.00	\$ 8,843.40
Sub-Total Fiscal Services			\$ 108,306.20	\$ 83,673.18	\$ 58,615.45	\$ 122,578.54	\$ 125,030.11
Food Services							
Salaries (Food Service Workers)			\$ 14,000.00	\$ 14,000.00	\$ -	\$ 14,280.00	\$ 14,565.60
Fringe Benefits			\$ 3,220.00	\$ 3,220.00	\$ -	\$ 3,284.40	\$ 3,350.09
Food, Materials & Supplies - Vendor provided meals 90% Participation	\$ 2.46	Per Meal per day	\$ 93,652.20	\$ 70,538.04	\$ 47,025.36	\$ 121,947.12	\$ 124,386.06
Equipment Rental / Lease (provided by food vendor)							
Inspection fees	\$ 75.00	Twice per year	\$ 150.00	\$ 150.00	\$ 150.00	\$ 153.00	\$ 156.06
Sub-Total Food Services			\$ 111,022.20	\$ 87,908.04	\$ 47,175.36	\$ 139,664.52	\$ 142,457.81

Budget Detail

Somerset Academy Vero Beach - 6-8			YEAR 1			YEAR 2	YEAR 3
			Expected	75% Enrollment	50% Enrollment		
Pupil Transportation Services							
Salaries (Drivers & Transportation workers)	See Staffing		\$ -	\$ -	\$ -	\$ -	\$ -
Fringe Benefits			\$ -	\$ -	\$ -	\$ -	\$ -
Contracted Transportation Services - \$235 per bus per day 40% utilization	\$ 265.00	40%	\$ 95,400.00	\$ 95,400.00	\$ 47,700.00	\$ 95,400.00	\$ 95,400.00
Sub-Total Pupil Transportation Services			\$ 95,400.00	\$ 97,900.00	\$ 50,200.00	\$ 95,400.00	\$ 95,400.00
Operation of Plant							
Salaries (Custodian, crossing guards, security)	See Staffing		\$ -	\$ -	\$ -	\$ 21,216.82	\$ 21,641.15
Fringe benefits			\$ -	\$ -	\$ -	\$ 4,879.87	\$ 4,977.47
Purchased Service (Custodial, fire and alarm, etc)	\$ 2,500.00	Per Classroom	\$ 27,500.00	\$ 20,000.00	\$ 15,000.00	\$ 35,700.00	\$ 36,414.00
Lawn Maintenance	\$ 200.00	Per Classroom	\$ 2,200.00	\$ 1,600.00	\$ 1,200.00	\$ 2,856.00	\$ 2,913.12
Pest Control	\$ 40.00	Per Classroom	\$ 440.00	\$ 320.00	\$ 240.00	\$ 571.20	\$ 582.62
Security Services	\$ 300.00	Per Month	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,672.00	\$ 3,745.44
Property Insurance	\$ 1,900.00	Per Classroom	\$ 20,900.00	\$ 15,200.00	\$ 11,400.00	\$ 27,132.00	\$ 27,674.64
Telephone Services	\$ 300.00	Per Month	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,672.00	\$ 3,745.44
Water & Sewer	\$ 80.00	Per Classroom	\$ 880.00	\$ 640.00	\$ 480.00	\$ 1,142.40	\$ 1,165.25
Electricity	\$ 2,200.00	Per Classroom	\$ 24,200.00	\$ 17,600.00	\$ 13,200.00	\$ 31,416.00	\$ 32,044.32
Sub-Total Operation of Plant			\$ 83,320.00	\$ 62,560.00	\$ 48,720.00	\$ 132,258.28	\$ 134,903.45
Maintenance of Plant							
Repairs & Maintenance	\$ 1.50	Sq. Ft.	\$ 19,387.50	\$ 9,204.00	\$ 3,055.00	\$ 23,400.00	\$ 23,400.00
Supplies							
Sub-Total Maintenance of Plant			\$ 19,387.50	\$ 9,204.00	\$ 3,055.00	\$ 23,400.00	\$ 23,400.00
Administrative Technology Services							
Systems Operation	\$ 750.00	Per Classroom	\$ 8,250.00	\$ 6,000.00	\$ 4,500.00	\$ 10,710.00	\$ 10,924.20
Systems Planning & Analysis							
Sub-Total Administrative Technology Services			\$ 8,250.00	\$ 6,000.00	\$ 4,500.00	\$ 10,710.00	\$ 10,924.20
Redemption of Principal Interest (Interest Only at 6%)						\$ 25,000.00	
Sub-Total Debt Service			\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ 25,000.00	\$ -
Contingency							
Operating expense contingency - 3% of FEFP - Considered restricted funds		3%	\$ 50,005.54	\$ 18,831.87	\$ 5,002.95	\$ 66,596.37	\$ 67,871.60
Sub-Total Contingency			\$ 50,005.54	\$ 18,831.87	\$ 5,002.95	\$ 66,596.37	\$ 67,871.60
Total Expenditures			\$ 1,639,310.97	\$ 1,214,981.29	\$ 823,091.03	\$ 2,194,109.47	\$ 2,210,392.39
Excess of Revenues over Expenditures			\$ 27,540.43	\$ 40,476.99	\$ 10,734.09	\$ 25,769.66	\$ 51,994.32

Somerset Academy Vero Beach - 6-8		YEAR 4	YEAR 5
ENROLLMENT			
6 - 8	Classrooms	14	14
Total Enrollment		300	300
REVENUES			
State Sources with expected enrollment		\$ 2,057,207.98	\$ 2,098,352.14
Federal Sources - NSLP funds 60% of students		\$ 102,461.75	\$ 104,510.99
Local Sources - Lunch program paid students		\$ 51,574.71	\$ 52,606.20
Capital Outlay (Available 1st Year - Advance/Ed Accredited)		\$ 64,500.00	\$ 64,500.00
Other Sources - Services		\$ 30,000.00	\$ 30,000.00
		\$ 2,305,744.44	\$ 2,349,969.33
EXPENDITURES			
Instruction			
Salaries (includes classroom teachers, contract or hourly, and teacher aides)		\$ 631,095.09	\$ 643,716.99
Fringe Benefits		\$ 145,151.87	\$ 148,054.91
Contracted Professional Services (includes Therapists & other contracted instructional services)		\$ 17,191.57	\$ 17,535.40
Classroom Supplies & Equipment		\$ 14,326.31	\$ 14,612.83
Teacher Supplies		\$ 11,142.68	\$ 11,365.54
Textbooks and/or ebooks/Student Activities		\$ 29,448.52	\$ 30,037.49
Supplemental instructional materials (CIRP/SIRP and Technology)		\$ 23,877.18	\$ 24,354.72
Digital Education Content Materials (Leased)		\$ 47,754.36	\$ 48,709.45
Computer - Equipment for instruction (leased)		\$ 26,742.44	\$ 27,277.29
Sub-Total Instruction		\$ 946,730.03	\$ 965,664.63
Pupil Personnel Services			
Salaries (includes counselor, school nurse, health assistant)		\$ 44,570.74	\$ 45,462.15
Fringe Benefits		\$ 10,251.27	\$ 10,456.29
Contracted Professional Services (counseling and psychological)		\$ 32,472.96	\$ 33,122.42
Sub-Total Pupil Personnel Services		\$ 87,294.97	\$ 89,040.87
Media Services			
Salaries (includes Librarian)		\$ -	\$ -
Fringe Benefits		\$ -	\$ -
Sub-Total Media Services		\$ -	\$ -
Curriculum Development			
Salaries (includes Curriculum Specialist)		\$ -	\$ -
Fringe Benefits		\$ -	\$ -
Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)		\$ 36,611.68	\$ 37,343.91
Student Activities		\$ 4,775.44	\$ 4,870.94
Sub-Total Curriculum Development		\$ 41,387.11	\$ 42,214.85
Staff Development			
Workshops/Trainings		\$ 15,000.00	\$ 15,000.00
Sub-Total Staff Development		\$ 15,000.00	\$ 15,000.00

Budget Detail

Somerset Academy Vero Beach - 6-8	YEAR 4	YEAR 5
Instruction Related Technology		
Salaries (includes Technology Personnel)	\$ -	\$ -
Fringe Benefits	\$ -	\$ -
EduSoft Software and Scanner	\$ 1,273.45	\$ 1,298.92
Hardware Maintenance	\$ 5,942.76	\$ 6,061.62
Sub-Total Instruction Related Technology	\$ 7,216.21	\$ 7,360.54
Board		
Professional Services (Legal)	\$ 2,653.02	\$ 2,706.08
Insurance (General Liability, D&O, Professional Liability)	\$ 13,742.64	\$ 14,017.50
Travel	\$ 2,122.42	\$ 2,164.86
Sub-Total Board	\$ 18,518.08	\$ 18,888.44
General Administration		
Management Fees (Portion of the \$450 fee charged by ESP)	\$ 71,631.54	\$ 73,064.17
Administrative Fee		
Sub-Total General Administration	\$ 71,631.54	\$ 73,064.17
School Administration		
Salaries (includes Principal, Secretary & other Office Personnel)	\$ 114,610.46	\$ 116,902.67
Fringe Benefits	\$ 26,360.41	\$ 26,887.61
Equipment Rental / Lease	\$ 3,820.35	\$ 3,896.76
Travel	\$ 636.72	\$ 649.46
Advertising and Promotion	\$ 1,591.81	\$ 1,623.65
License Fees	\$ 212.24	\$ 216.49
Dues and Subscriptions	\$ 1,273.45	\$ 1,298.92
Postage	\$ 742.85	\$ 757.70
Printing	\$ 3,342.81	\$ 3,409.66
Office Supplies	\$ 7,500.00	\$ 7,500.00
Office Equipment	\$ 1,591.81	\$ 1,623.65
Computer Equipment	\$ 530.60	\$ 541.22
Sub-Total School Administration	\$ 162,213.51	\$ 165,307.78
Facilities Acquisition & Construction		
Building Lease / Rent (see budget summary for calculation)	\$ 295,036.29	\$ 303,887.38
Sub-Total Facilities Acquisition & Construction	\$ 295,036.29	\$ 303,887.38
Fiscal Services		
Salaries (Business Manager, Accounting & Bookkeeping Personnel)	\$ -	\$ -
Fringe Benefits	\$ -	\$ -
Fee to County School Board - up to 250 students	\$ 83,490.58	\$ 85,160.40
Planning, Research, Development and Evaluation (Part of ESP's Fee)	\$ 35,019.86	\$ 35,720.26
Professional Services - Annual Audit	\$ 9,020.27	\$ 9,200.67
Sub-Total Fiscal Services	\$ 127,530.72	\$ 130,081.33
Food Services		
Salaries (Food Service Workers)	\$ 14,856.91	\$ 15,154.05
Fringe Benefits	\$ 3,417.09	\$ 3,485.43
Food, Materials & Supplies - Vendor provided meals 90% Participation	\$ 126,873.78	\$ 129,411.26
Equipment Rental / Lease (provided by food vendor)		
Inspection fees	\$ 159.18	\$ 162.36
Sub-Total Food Services	\$ 145,306.97	\$ 148,213.11

Somerset Academy Vero Beach - 6-8	YEAR 4	YEAR 5
Pupil Transportation Services		
Salaries (Drivers & Transportation workers)	\$ -	\$ -
Fringe Benefits	\$ -	\$ -
Contracted Transportation Services - \$235 per bus per day 40% utilization	\$ 95,400.00	\$ 95,400.00
Sub-Total Pupil Transportation Services	\$ 95,400.00	\$ 95,400.00
Operation of Plant		
Salaries (Custodian, crossing guards, security)	\$ 22,073.98	\$ 22,515.45
Fringe benefits	\$ 5,077.01	\$ 5,178.55
Purchased Service (Custodial, fire and alarm, etc)	\$ 37,142.28	\$ 37,885.13
Lawn Maintenance	\$ 2,971.38	\$ 3,030.81
Pest Control	\$ 594.28	\$ 606.16
Security Services	\$ 3,820.35	\$ 3,896.76
Property Insurance	\$ 28,228.13	\$ 28,792.70
Telephone Services	\$ 3,820.35	\$ 3,896.76
Water & Sewer	\$ 1,188.55	\$ 1,212.32
Electricity	\$ 32,685.21	\$ 33,338.91
Sub-Total Operation of Plant	\$ 137,601.52	\$ 140,353.55
Maintenance of Plant		
Repairs & Maintenance	\$ 23,400.00	\$ 23,400.00
Supplies		
Sub-Total Maintenance of Plant	\$ 23,400.00	\$ 23,400.00
Administrative Technology Services		
Systems Operation	\$ 11,142.68	\$ 11,365.54
Systems Planning & Analysis		
Sub-Total Administrative Technology Services	\$ 11,142.68	\$ 11,365.54
Redemption of Principal Interest (Interest Only at 6%)		
Sub-Total Debt Service	\$ -	\$ -
Contingency		
Operating expense contingency - 3% of FEFP - Considered restricted funds	\$ 69,172.33	\$ 70,499.08
Sub-Total Contingency	\$ 69,172.33	\$ 70,499.08
Total Expenditures	\$ 2,254,581.97	\$ 2,299,741.27
Excess of Revenues over Expenditures	\$ 51,162.48	\$ 50,228.06

Somerset Academy Vero Beach - 6-8

	YEAR 1												
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	
REVENUES													
State Sources with expected enrollment	123,260	123,260	123,260	123,260	123,260	123,260	123,260	123,260	123,260	123,260	123,260	123,260	\$ 1,479,124.00
Federal Sources - NSLP funds 60% of students			7,563	7,563	7,563	7,563	7,563	7,563	7,563	7,563	7,563	7,563	\$ 75,632.40
Local Sources - Lunch program paid students			3,807	3,807	3,807	3,807	3,807	3,807	3,807	3,807	3,807	3,807	\$ 38,070.00
Capital Outlay (Available 1st Year - Advance/Ed Accredited)				5,614	5,614	5,614	5,614	5,614	5,614	5,614	5,614	5,614	\$ 50,925.00
Other Sources - Services				2,611	2,611	2,611	2,611	2,611	2,611	2,611	2,611	2,611	\$ 23,900.00
	123,260	123,260	134,631	142,856	142,856	142,856	142,856	142,856	142,856	142,856	142,856	142,856	\$ 1,666,851.40
EXPENDITURES													
Instruction													
Salaries (includes classroom teachers, contract or hourly, and teacher aides)		21,414	44,970	44,970	44,970	44,970	44,970	44,970	44,970	44,970	44,970	44,970	\$ 471,117.50
Fringe Benefits		4,925	10,343	10,343	10,343	10,343	10,343	10,343	10,343	10,343	10,343	10,343	\$ 108,357.03
Contracted Professional Services (includes Therapists & other contracted instructional services)				1,410	1,410	1,410	1,410	1,410	1,410	1,410	1,410	1,410	\$ 12,890.00
Classroom Supplies & Equipment		3,490	3,490										\$ 10,575.00
Teacher Supplies		2,714	2,714	2,797									\$ 8,225.00
Textbooks and/or ebooks/Student Activities		14,347	14,347	14,782									\$ 43,475.00
Supplemental instructional materials (CIRP/SIRP and Technology)		5,816	5,816	5,993									\$ 17,625.00
Digital Education Content Materials (Leased)												35,250	\$ 35,250.00
Computer - Equipment for Instruction (Leased)		6,534	6,534	6,732									\$ 19,800.00
Computer Lab - Including Software													\$ -
Sub-Total Instruction		59,241	88,214	90,621	56,723	56,723	56,723	56,723	56,723	56,723	56,723	91,973	\$ 727,114.53
Pupil Personnel Services													
Salaries (includes counselor, school nurse, health assistant)													\$ -
Fringe Benefits													\$ -
Contracted Professional Services (counseling and psychological)			2,397	2,397	2,397	2,397	2,397	2,397	2,397	2,397	2,397	2,397	\$ 23,970.00
Sub-Total Pupil Personnel Services			2,397	2,397	2,397	2,397	2,397	2,397	2,397	2,397	2,397	2,397	\$ 23,970.00
Media Services													
Salaries (Includes Librarian)													\$ -
Fringe Benefits													\$ -
Library Books													\$ -
Audio Visual Materials													\$ -
Sub-Total Media Services													\$ -
Curriculum Development													
Salaries (includes Curriculum Specialist)													\$ -
Fringe Benefits													\$ -
Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)	2,252	2,252	2,252	2,252	2,252	2,252	2,252	2,252	2,252	2,252	2,252	2,252	\$ 27,025.00
Development Supplies													\$ -
Student Activities		1,763	1,763										\$ 3,525.00
Sub-Total Curriculum Development	2,252	4,015	4,015	2,252	2,252	2,252	2,252	2,252	2,252	2,252	2,252	2,252	\$ 30,550.00
Staff Development													
Workshops/Trainings		6,000							6,000				\$ 12,000.00
Travel													\$ -
Professional Services													\$ -
Sub-Total Staff Development		6,000							6,000				\$ 12,000.00
Instruction Related Technology													
Salaries (includes Technology Personnel)													\$ -
Fringe Benefits													\$ -
EduSoft Software and Scanner		600	600										\$ 1,200.00
Hardware Maintenance				489	489	489	489	489	489	489	489	489	\$ 4,400.00
Computer Learning Labs													\$ -
Sub-Total Instruction Related Technology		600	600	489	489	489	489	489	489	489	489	489	\$ 5,600.00
Board													
Professional Services (Legal)						625	625	625	625	625			\$ 2,500.00
Insurance (General Liability, D&O, Professional Liability)	2,544			2,544			2,544	625	625	2,544			\$ 10,175.00
Travel	2,000												\$ 2,000.00
Sub-Total Board	4,544			2,544		625	3,169	625	625	2,544			\$ 14,675.00
General Administration													
Management Fees (Portion of the \$450 fee charged by ESP)												52,875	\$ 52,875.00
Administrative Fee													\$ -

Somerset Academy Vero Beach - 6-8

													YEAR 1	
Sub-Total General Administration													52,875	\$ 52,875.00
School Administration														
Salaries (includes Principal, Secretary & other Office Personnel)	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	\$ 54,000.00
Fringe Benefits	1,035	1,035	1,035	1,035	1,035	1,035	1,035	1,035	1,035	1,035	1,035	1,035	\$ 12,420.00	
Equipment Rental / Lease	300	300	300	300	300	300	300	300	300	300	300	300	\$ 3,600.00	
Travel				600									\$ 600.00	
Advertising and Promotion	392	392							392				\$ 1,175.00	
License Fees	200												\$ 200.00	
Dues and Subscriptions	940												\$ 940.00	
Postage			55	55	55	55	55	55	55	55	55	55	\$ 550.00	
Printing	1,238	113	113	113	113	113	113	113	113	113	113	113	\$ 2,475.00	
Office Supplies	1,469	401	401	401	401	401	401	401	401	401	401	401	\$ 5,875.00	
Office Equipment	1,500												\$ 1,500.00	
Computer Equipment	500												\$ 500.00	
Sub-Total School Administration													6,403	\$ 83,835.00
Facilities Acquisition & Construction														
Building Lease / Rent (see budget summary for calculation)		19,227	19,227	19,227	19,227	19,227	19,227	19,227	19,227	19,227	19,227	19,227	\$ 211,500.00	
Remodeling & Renovations													\$ -	
Purchase of Buildings & Fixed Equipment													\$ -	
Land													\$ -	
Sub-Total Facilities Acquisition & Construction													19,227	\$ 211,500.00
Fiscal Services														
Salaries (Business Manager, Accounting & Bookkeeping Personnel)													\$ -	
Fringe Benefits													\$ -	
Fee to County School Board - up to 250 students	6,163	6,163	6,163	6,163	6,163	6,163	6,163	6,163	6,163	6,163	6,163	6,163	\$ 73,956.20	
Planning, Research, Development and Evaluation (Part of ESP's Fee)	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	\$ 25,850.00	
Professional Services - Annual Audit	708	708	708	708	708	708	708	708	708	708	708	708	\$ 8,500.00	
Sub-Total Fiscal Services													9,026	\$ 108,306.20
Food Services														
Salaries (Food Service Workers)			1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	\$ 14,000.00	
Fringe Benefits			322	322	322	322	322	322	322	322	322	322	\$ 3,220.00	
Food													\$ -	
Food, Materials & Supplies - Vendor provided meals 90% Participation			9,365	9,365	9,365	9,365	9,365	9,365	9,365	9,365	9,365	9,365	\$ 93,652.20	
Equipment Rental / Lease (provided by food vendor)													\$ -	
Inspection fees			15	15	15	15	15	15	15	15	15	15	\$ 150.00	
Sub-Total Food Services													11,102	\$ 111,022.20
Pupil Transportation Services														
Salaries (Drivers & Transportation workers)													\$ -	
Fringe Benefits													\$ -	
Contracted Transportation Services - \$235 per bus per day 40% utilization			9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	\$ 95,400.00	
Field Trip Expenses for competitions													\$ -	
Buses													\$ -	
Repairs & Maintenance													\$ -	
Fuel													\$ -	
Sub-Total Pupil Transportation Services													9,540	\$ 95,400.00
Operation of Plant														
Salaries (Custodian, crossing guards, security)													\$ -	
Fringe benefits													\$ -	
Purchased Service (Custodial, fire and alarm, etc)	2,292	2,292	2,292	2,292	2,292	2,292	2,292	2,292	2,292	2,292	2,292	2,292	\$ 27,500.00	
Lawn Maintenance	183	183	183	183	183	183	183	183	183	183	183	183	\$ 2,200.00	
Pest Control	37	37	37	37	37	37	37	37	37	37	37	37	\$ 440.00	
Security Services	300	300	300	300	300	300	300	300	300	300	300	300	\$ 3,600.00	
Property Insurance	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	\$ 20,900.00	
Telephone Services	300	300	300	300	300	300	300	300	300	300	300	300	\$ 3,600.00	
Water & Sewer	73	73	73	73	73	73	73	73	73	73	73	73	\$ 880.00	
Electricity	2,017	2,017	2,017	2,017	2,017	2,017	2,017	2,017	2,017	2,017	2,017	2,017	\$ 24,200.00	
Custodial Supplies & Equipment													\$ -	
Sub-Total Operation of Plant													6,943	\$ 83,320.00
Maintenance of Plant														
Repairs & Maintenance		1,763	1,763	1,763	1,763	1,763	1,763	1,763	1,763	1,763	1,763	1,763	\$ 19,387.50	
Supplies													\$ -	
Sub-Total Maintenance of Plant													1,763	\$ 19,387.50

Somerset Academy Vero Beach - 6-8

	YEAR 1												
Administrative Technology Services													
Internal Technology Support	-	-	-	-	-	-	-	-	-	-	-	-	\$ -
Technology Personnel	-	-	-	-	-	-	-	-	-	-	-	-	\$ -
Systems Operation	688	688	688	688	688	688	688	688	688	688	688	688	\$ 8,250.00
Systems Planning & Analysis	-	-	-	-	-	-	-	-	-	-	-	-	\$ -
Sub-Total Administrative Technology Services	688	688	688	688	688	688	688	688	688	688	688	688	\$ 8,250.00
After Care Programs													
After Care Salary	-	-	-	-	-	-	-	-	-	-	-	-	\$ -
Fringe Benefits	-	-	-	-	-	-	-	-	-	-	-	-	\$ -
Sub-Total After Care Programs	-	-	-	-	-	-	-	-	-	-	-	-	\$ -
Debt Service													
Redemption of Principal	-	-	-	-	-	-	-	-	-	-	-	-	\$ -
Interest (Interest Only at 6%)	-	136	136	136	136	136	136	136	136	136	136	136	\$ 1,500.00
Sub-Total Debt Service	-	136	136	136	136	136	136	136	136	136	136	136	\$ 1,500.00
Contingency													
Operating expense contingency - 3% of FEFP - Considered restricted funds	-	-	-	-	-	-	-	-	-	-	-	50,006	\$ 50,005.54
Sub-Total Contingency	-	-	-	-	-	-	-	-	-	-	-	50,006	\$ 50,005.54
Total Expenditures	\$ 35,525.10	\$ 114,377.56	\$ 160,053.84	\$ 163,730.97	\$ 126,689.22	\$ 127,314.22	\$ 129,857.97	\$ 127,314.22	\$ 133,705.89	\$ 129,232.97	\$ 126,689.22	\$ 264,819.77	\$ 1,639,310.97
Excess of Revenues over Expenditures	\$ 87,735.23	\$ 8,882.78	\$ (25,423.26)	\$ (20,875.40)	\$ 16,166.35	\$ 15,541.35	\$ 12,997.60	\$ 15,541.35	\$ 9,149.68	\$ 13,622.60	\$ 16,166.35	\$ (121,964.19)	\$ 27,540.43
Fund Balance	\$ 87,735.23	\$ 96,618.01	\$ 71,194.75	\$ 50,319.35	\$ 66,485.70	\$ 82,027.05	\$ 95,024.65	\$ 110,565.99	\$ 119,715.68	\$ 133,338.28	\$ 149,504.63	\$ 27,540.43	

Somerset Academy Vero Beach - 6-8

													YEAR 2
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	100 % Enrollment
REVENUES													
State Sources with expected enrollment	164,777	164,777	164,777	164,777	164,777	164,777	164,777	164,777	164,777	164,777	164,777	164,777	\$ 1,977,324.09
Federal Sources - NSLP funds 60% of students			9,848	9,848	9,848	9,848	9,848	9,848	9,848	9,848	9,848	9,848	\$ 98,483.04
Local Sources - Lunch program paid students			4,957	4,957	4,957	4,957	4,957	4,957	4,957	4,957	4,957	4,957	\$ 49,572.00
Capital Outlay (Available 1st Year - Advance/Ed Accredited)			7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	\$ 64,500.00
Other Sources - Services			3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	\$ 30,000.00
Previous Years Balance Carry Forward	27,540												\$ 27,540.43
	192,317	164,777	179,583	190,083	190,083	190,083	190,083	190,083	190,083	190,083	190,083	190,083	\$ 2,247,419.56
EXPENDITURES													
Instruction													
Salaries (includes classroom teachers, contract or hourly, and teacher aides)		27,572	57,902	57,902	57,902	57,902	57,902	57,902	57,902	57,902	57,902	57,902	\$ 606,588.90
Fringe Benefits		6,342	13,317	13,317	13,317	13,317	13,317	13,317	13,317	13,317	13,317	13,317	\$ 139,615.45
Contracted Professional Services (includes Therapists & other contracted instructional services)				1,836	1,836	1,836	1,836	1,836	1,836	1,836	1,836	1,836	\$ 16,524.00
Classroom Supplies & Equipment		4,544	4,544	4,682									\$ 13,770.00
Teacher Supplies		3,534	3,534	3,641									\$ 10,710.00
Textbooks and/or ebooks/Student Activities		18,681	18,681	19,247									\$ 56,610.00
Supplemental instructional materials (CIRP/SIRP and Technology)		7,574	7,574	7,803									\$ 22,950.00
Digital Education Content Materials (Leased)												45,900	\$ 45,900.00
Computer - Equipment for Instruction (leased)		8,482	8,482	8,739									\$ 25,704.00
Computer Lab - including Software													\$ -
Sub-Total Instruction		76,729	114,055	117,168	73,055	73,055	73,055	73,055	73,055	73,055	73,055	118,955	\$ 938,272.35
Pupil Personnel Services													
Salaries (includes counselor, school nurse, health assistant)			2,142	2,142	2,142	2,142	2,142	2,142	2,142	2,142	2,142	2,142	\$ 21,420.00
Fringe Benefits			493	493	493	493	493	493	493	493	493	493	\$ 4,826.60
Contracted Professional Services (counseling and psychological)			3,121	3,121	3,121	3,121	3,121	3,121	3,121	3,121	3,121	3,121	\$ 31,212.00
Sub-Total Pupil Personnel Services			5,756	5,756	5,756	5,756	5,756	5,756	5,756	5,756	5,756	5,756	\$ 57,558.60
Media Services													
Salaries (includes Librarian)													\$ -
Fringe Benefits													\$ -
Library Books													\$ -
Audio Visual Materials													\$ -
Sub-Total Media Services													\$ -
Curriculum Development													
Salaries (includes Curriculum Specialist)													\$ -
Fringe Benefits													\$ -
Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933	\$ 35,190.00
Development Supplies													\$ -
Student Activities		2,295	2,295										\$ 4,590.00
Sub-Total Curriculum Development	2,933	5,228	5,228	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933	2,933	\$ 39,780.00
Staff Development													
Workshops/Trainings		7,500							7,500				\$ 15,000.00
Travel													\$ -
Professional Services													\$ -
Sub-Total Staff Development		7,500							7,500				\$ 15,000.00
Instruction Related Technology													
Salaries (includes Technology Personnel)													\$ -
Fringe Benefits													\$ -
EduSoft Software and Scanner		612	612										\$ 1,224.00
Hardware Maintenance				635	635	635	635	635	635	635	635	635	\$ 5,712.00
Computer Learning Labs													\$ -
Sub-Total Instruction Related Technology		612	612	635	635	635	635	635	635	635	635	635	\$ 6,936.00
Board													
Professional Services (Legal)	2,550												\$ 2,550.00
Insurance (General Liability, D&O, Professional Liability)	3,302			3,302			3,302			3,302			\$ 13,209.00
Travel	2,040												\$ 2,040.00
Sub-Total Board	7,892			3,302			3,302			3,302			\$ 17,799.00
General Administration													
Management Fees (Portion of the \$450 fee charged by ESP)	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	5,738	\$ 68,850.00
Administrative Fee													\$ -

Somerset Academy Vero Beach - 6-8

													YEAR 2		
													100 % Enrollment		
Sub-Total General Administration	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	\$ 68,850.00
School Administration															
Salaries (includes Principal, Secretary & other Office Personnel)	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	9,180	\$ 110,160.00
Fringe Benefits	2,111	2,111	2,111	2,111	2,111	2,111	2,111	2,111	2,111	2,111	2,111	2,111	2,111	2,111	\$ 25,336.80
Equipment Rental / Lease	306	306	306	306	306	306	306	306	306	306	306	306	306	306	\$ 3,672.00
Travel				612											\$ 612.00
Advertising and Promotion	510	510	510												\$ 1,530.00
License Fees	204														\$ 204.00
Dues and Subscriptions	1,224														\$ 1,224.00
Postage			71	71	71	71	71	71	71	71	71	71	71	71	\$ 714.00
Printing	1,607	146	146	146	146	146	146	146	146	146	146	146	146	146	\$ 3,213.00
Office Supplies	1,875	511	511	511	511	511	511	511	511	511	511	511	511	511	\$ 7,500.00
Office Equipment	1,530														\$ 1,530.00
Computer Equipment	510														\$ 510.00
Sub-Total School Administration	19,057	12,765	12,816	12,918	12,928	12,928	12,928	12,928	12,928	12,928	12,928	12,928	12,928	12,928	\$ 156,205.80
Facilities Acquisition & Construction															
Building Lease / Rent (see budget summary for calculation)		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	\$ 278,100.00
Remodeling & Renovations															\$ -
Purchase of Buildings & Fixed Equipment															\$ -
Land															\$ -
Sub-Total Facilities Acquisition & Construction		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	\$ 278,100.00
Fiscal Services															
Salaries (Business Manager, Accounting & Bookkeeping Personnel)															\$ -
Fringe Benefits															\$ -
Fee to County School Board - up to 250 students	6,687	6,687	6,687	6,687	6,687	6,687	6,687	6,687	6,687	6,687	6,687	6,687	6,687	6,687	\$ 80,248.54
Planning, Research, Development and Evaluation (Part of ESP's Fee)	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	2,805	\$ 33,660.00
Professional Services - Annual Audit	723	723	723	723	723	723	723	723	723	723	723	723	723	723	\$ 8,670.00
Sub-Total Fiscal Services	10,215	10,215	10,215	10,215	10,215	10,215	10,215	10,215	10,215	10,215	10,215	10,215	10,215	10,215	\$ 122,578.54
Food Services															
Salaries (Food Service Workers)			1,428	1,428	1,428	1,428	1,428	1,428	1,428	1,428	1,428	1,428	1,428	1,428	\$ 14,280.00
Fringe Benefits			328	328	328	328	328	328	328	328	328	328	328	328	\$ 3,284.40
Food															\$ -
Food, Materials & Supplies - Vendor provided meals 90% Participation			12,195	12,195	12,195	12,195	12,195	12,195	12,195	12,195	12,195	12,195	12,195	12,195	\$ 121,947.12
Equipment Rental / Lease (provided by food vendor)															\$ -
Inspection fees			15	15	15	15	15	15	15	15	15	15	15	15	\$ 153.00
Sub-Total Food Services			13,966	13,966	13,966	13,966	13,966	13,966	13,966	13,966	13,966	13,966	13,966	13,966	\$ 139,664.52
Pupil Transportation Services															
Salaries (Drivers & Transportation workers)															\$ -
Fringe Benefits															\$ -
Contracted Transportation Services - \$235 per bus per day 40% utilization			9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	\$ 95,400.00
Field Trip Expenses for competitions															\$ -
Buses															\$ -
Repairs & Maintenance															\$ -
Fuel															\$ -
Sub-Total Pupil Transportation Services			9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	\$ 95,400.00
Operation of Plant															
Salaries (Custodian, crossing guards, security)	1,768	1,768	1,768	1,768	1,768	1,768	1,768	1,768	1,768	1,768	1,768	1,768	1,768	1,768	\$ 21,216.82
Fringe benefits	407	407	407	407	407	407	407	407	407	407	407	407	407	407	\$ 4,879.87
Purchased Service (Custodial, fire and alarm, etc)	2,975	2,975	2,975	2,975	2,975	2,975	2,975	2,975	2,975	2,975	2,975	2,975	2,975	2,975	\$ 35,700.00
Lawn Maintenance	238	238	238	238	238	238	238	238	238	238	238	238	238	238	\$ 2,856.00
Pest Control	48	48	48	48	48	48	48	48	48	48	48	48	48	48	\$ 571.20
Security Services	306	306	306	306	306	306	306	306	306	306	306	306	306	306	\$ 3,672.00
Property Insurance	2,261	2,261	2,261	2,261	2,261	2,261	2,261	2,261	2,261	2,261	2,261	2,261	2,261	2,261	\$ 27,132.00
Telephone Services	306	306	306	306	306	306	306	306	306	306	306	306	306	306	\$ 3,672.00
Water & Sewer	95	95	95	95	95	95	95	95	95	95	95	95	95	95	\$ 1,142.40
Electricity	2,618	2,618	2,618	2,618	2,618	2,618	2,618	2,618	2,618	2,618	2,618	2,618	2,618	2,618	\$ 31,416.00
Custodial Supplies & Equipment															\$ -
Sub-Total Operation of Plant	11,022	11,022	11,022	11,022	11,022	11,022	11,022	11,022	11,022	11,022	11,022	11,022	11,022	11,022	\$ 132,258.28
Maintenance of Plant															
Repairs & Maintenance		2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	\$ 23,400.00
Supplies															\$ -
Sub-Total Maintenance of Plant		2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	\$ 23,400.00
Administrative Technology Services															

Somerset Academy Vero Beach - 6-8

													YEAR 2	
													100 % Enrollment	
Internal Technology Support	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Technology Personnel	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Systems Operation	893	893	893	893	893	893	893	893	893	893	893	893	\$	10,710.00
Systems Planning & Analysis	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
<i>Sub-Total Administrative Technology Services</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>893</i>	<i>\$</i>	<i>10,710.00</i>
<i>After Care Programs</i>														
After Care Salary	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Fringe Benefits	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
<i>Sub-Total After Care Programs</i>													<i>\$</i>	<i>-</i>
<i>Debt Service</i>														
Redemption of Principal	-	2,273	2,273	2,273	2,273	2,273	2,273	2,273	2,273	2,273	2,273	2,273	\$	25,000.00
Interest (Interest Only at 6%)	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
<i>Sub-Total Debt Service</i>		<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>2,273</i>	<i>\$</i>	<i>25,000.00</i>
<i>Contingency</i>														
Operating expense contingency - 3% of FEFP - Considered restricted funds	-	-	-	-	-	-	-	-	-	-	-	-	\$	66,596.37
<i>Sub-Total Contingency</i>													<i>\$</i>	<i>66,596.37</i>
Total Expenditures	\$ 57,748.05	\$ 160,381.88	\$ 219,520.81	\$ 223,786.17	\$ 175,758.96	\$ 175,758.96	\$ 179,061.21	\$ 175,758.96	\$ 183,258.96	\$ 179,061.21	\$ 175,758.96	\$ 288,255.33	\$	2,194,109.47
Excess of Revenues over Expenditures	\$ 134,569.39	\$ 4,395.12	\$ (39,938.30)	\$ (33,703.86)	\$ 14,323.55	\$ 14,323.55	\$ 11,021.30	\$ 14,323.55	\$ 6,823.55	\$ 11,021.30	\$ 14,323.55	\$ (98,172.82)	\$	53,310.09
Fund Balance	\$ 134,569.39	\$ 138,964.51	\$ 99,026.21	\$ 65,322.55	\$ 79,646.10	\$ 93,969.66	\$ 104,990.96	\$ 118,314.51	\$ 126,138.06	\$ 137,159.36	\$ 151,482.92	\$ 53,310.09		

Somerset Academy Vero Beach - 6-8

													YEAR 3	
													100 % Enrollment	
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun		
REVENUES														
State Sources with expected enrollment	168,073	168,073	168,073	168,073	168,073	168,073	168,073	168,073	168,073	168,073	168,073	168,073	\$	2,016,870.57
Federal Sources - NSLP funds 60% of students			10,045	10,045	10,045	10,045	10,045	10,045	10,045	10,045	10,045	10,045	\$	100,452.70
Local Sources - Lunch program paid students			5,056	5,056	5,056	5,056	5,056	5,056	5,056	5,056	5,056	5,056	\$	50,563.44
Capital Outlay (Available 1st Year - Advance/Ed Accredited)			7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	\$	64,500.00
Other Sources - Services				3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	\$	30,000.00
Previous Years Balance Carry Forward	53,310												\$	53,310.09
	221,383	168,073	183,174	193,674	193,674	193,674	193,674	193,674	193,674	193,674	193,674	193,674	\$	2,315,696.80
EXPENDITURES														
Instruction														
Salaries (includes classroom teachers, contract or hourly, and teacher aides)		28,124	59,060	59,060	59,060	59,060	59,060	59,060	59,060	59,060	59,060	59,060	\$	618,720.68
Fringe Benefits		6,468	13,584	13,584	13,584	13,584	13,584	13,584	13,584	13,584	13,584	13,584	\$	142,305.76
Contracted Professional Services (includes Therapists & other contracted instructional services)			1,873	1,873	1,873	1,873	1,873	1,873	1,873	1,873	1,873	1,873	\$	16,854.48
Classroom Supplies & Equipment		4,635	4,635	4,775									\$	14,045.40
Teacher Supplies		3,605	3,605	3,714									\$	10,924.20
Textbooks and/or ebooks/Student Activities		9,527	9,527	9,816									\$	28,871.10
Supplemental instructional materials (CIRP/SIRP and Technology)		7,725	7,725	7,959									\$	23,409.00
Digital Education Content Materials (Leased)												46,818	\$	46,818.00
Computer - Equipment for Instruction (Leased)		8,652	8,652	8,914									\$	26,218.08
Computer Lab - Including Software													\$	-
Sub-Total Instruction		68,736	106,788	109,695	74,518	74,518	74,518	74,518	74,518	74,518	74,518	74,518	\$	928,166.69
Pupil Personnel Services														
Salaries (includes counselor, school nurse, health assistant)			4,370	4,370	4,370	4,370	4,370	4,370	4,370	4,370	4,370	4,370	\$	43,696.80
Fringe Benefits			1,005	1,005	1,005	1,005	1,005	1,005	1,005	1,005	1,005	1,005	\$	10,050.26
Contracted Professional Services (counseling and psychological)			3,184	3,184	3,184	3,184	3,184	3,184	3,184	3,184	3,184	3,184	\$	31,836.24
Sub-Total Pupil Personnel Services			8,558	8,558	8,558	8,558	8,558	8,558	8,558	8,558	8,558	8,558	\$	85,583.30
Media Services														
Salaries (includes Librarian)													\$	-
Fringe Benefits													\$	-
Library Books													\$	-
Audio Visual Materials													\$	-
Sub-Total Media Services													\$	-
Curriculum Development														
Salaries (includes Curriculum Specialist)													\$	-
Fringe Benefits													\$	-
Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991	\$	35,893.80
Development Supplies			2,341										\$	-
Student Activities			2,341										\$	4,681.80
Sub-Total Curriculum Development	2,991	5,332	5,332	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991	2,991	\$	40,575.60
Staff Development														
Workshops/Trainings		7,500							7,500				\$	15,000.00
Travel													\$	-
Professional Services													\$	-
Sub-Total Staff Development		7,500							7,500				\$	15,000.00
Instruction Related Technology														
Salaries (includes Technology Personnel)													\$	-
Fringe Benefits													\$	-
EduSoft Software and Scanner		624	624										\$	1,248.48
Hardware Maintenance				647	647	647	647	647	647	647	647	647	\$	5,826.24
Computer Learning Labs													\$	-
Sub-Total Instruction Related Technology		624	624	647	647	647	647	647	647	647	647	647	\$	7,074.72
Board														
Professional Services (Legal)	2,601												\$	2,601.00
Insurance (General Liability, D&O, Professional Liability)	3,368			3,368			3,368		3,368				\$	13,473.18
Travel	2,081												\$	2,080.80
Sub-Total Board	4,050			3,368			3,368		3,368				\$	18,154.98
General Administration														
Management Fees (Portion of the \$450 fee charged by ESP)	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	\$	70,227.00
Administrative Fee													\$	-

Somerset Academy Vero Beach - 6-8

													YEAR 3	
													100 % Enrollment	
Sub-Total General Administration	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	5,852	\$	70,227.00
School Administration														
Salaries (includes Principal, Secretary & other Office Personnel)	9,364	9,364	9,364	9,364	9,364	9,364	9,364	9,364	9,364	9,364	9,364	9,364	\$	112,363.20
Fringe Benefits	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	2,154	\$	25,843.54
Equipment Rental / Lease	312	312	312	312	312	312	312	312	312	312	312	312	\$	3,745.44
Travel				624									\$	624.24
Advertising and Promotion	520	520	520										\$	1,560.60
License Fees	208												\$	208.08
Dues and Subscriptions	1,248												\$	1,248.48
Postage			73	73	73	73	73	73	73	73	73	73	\$	728.28
Printing	1,639	149	149	149	149	149	149	149	149	149	149	149	\$	3,277.26
Office Supplies	1,875	511	511	511	511	511	511	511	511	511	511	511	\$	7,500.00
Office Equipment	1,561												\$	1,560.60
Computer Equipment	520												\$	520.20
Sub-Total School Administration	19,401	13,010	13,083	13,187	12,563	\$	159,179.92							
Facilities Acquisition & Construction														
Building Lease / Rent (see budget summary for calculation)		26,040	26,040	26,040	26,040	26,040	26,040	26,040	26,040	26,040	26,040	26,040	\$	286,443.00
Remodeling & Renovations													\$	-
Purchase of Buildings & Fixed Equipment													\$	-
Land													\$	-
Sub-Total Facilities Acquisition & Construction		26,040	\$	286,443.00										
Fiscal Services														
Salaries (Business Manager, Accounting & Bookkeeping Personnel)													\$	-
Fringe Benefits													\$	-
Fee to County School Board - up to 250 students	6,821	6,821	6,821	6,821	6,821	6,821	6,821	6,821	6,821	6,821	6,821	6,821	\$	81,853.51
Planning, Research, Development and Evaluation (Part of ESP's Fee)	2,861	2,861	2,861	2,861	2,861	2,861	2,861	2,861	2,861	2,861	2,861	2,861	\$	34,333.20
Professional Services - Annual Audit	737	737	737	737	737	737	737	737	737	737	737	737	\$	8,843.40
Sub-Total Fiscal Services	10,419	\$	125,030.11											
Food Services														
Salaries (Food Service Workers)			1,457	1,457	1,457	1,457	1,457	1,457	1,457	1,457	1,457	1,457	\$	14,566.80
Fringe Benefits			335	335	335	335	335	335	335	335	335	335	\$	3,350.09
Food													\$	-
Food, Materials & Supplies - Vendor provided meals 90% Participation			12,439	12,439	12,439	12,439	12,439	12,439	12,439	12,439	12,439	12,439	\$	124,386.06
Equipment Rental / Lease (provided by food vendor)													\$	-
Inspection fees			16	16	16	16	16	16	16	16	16	16	\$	156.06
Sub-Total Food Services			14,246	\$	142,457.81									
Pupil Transportation Services														
Salaries (Drivers & Transportation workers)													\$	-
Fringe Benefits													\$	-
Contracted Transportation Services - \$235 per bus per day 40% utilization			9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	\$	96,400.00
Field Trip Expenses for competitions													\$	-
Buses													\$	-
Repairs & Maintenance													\$	-
Fuel													\$	-
Sub-Total Pupil Transportation Services			9,540	\$	95,400.00									
Operation of Plant														
Salaries (Custodian, crossing guards, security)	1,803	1,803	1,803	1,803	1,803	1,803	1,803	1,803	1,803	1,803	1,803	1,803	\$	21,641.15
Fringe benefits	415	415	415	415	415	415	415	415	415	415	415	415	\$	4,977.47
Purchased Service (Custodial, fire and alarm, etc)	3,035	3,035	3,035	3,035	3,035	3,035	3,035	3,035	3,035	3,035	3,035	3,035	\$	36,414.00
Lawn Maintenance	243	243	243	243	243	243	243	243	243	243	243	243	\$	2,913.12
Pest Control	49	49	49	49	49	49	49	49	49	49	49	49	\$	582.62
Security Services	312	312	312	312	312	312	312	312	312	312	312	312	\$	3,745.44
Property Insurance	2,306	2,306	2,306	2,306	2,306	2,306	2,306	2,306	2,306	2,306	2,306	2,306	\$	27,674.64
Telephone Services	312	312	312	312	312	312	312	312	312	312	312	312	\$	3,745.44
Water & Sewer	97	97	97	97	97	97	97	97	97	97	97	97	\$	1,185.25
Electricity	2,670	2,670	2,670	2,670	2,670	2,670	2,670	2,670	2,670	2,670	2,670	2,670	\$	32,044.32
Custodial Supplies & Equipment													\$	-
Sub-Total Operation of Plant	11,242	\$	134,903.45											
Maintenance of Plant														
Repairs & Maintenance		2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	\$	23,400.00
Supplies													\$	-
Sub-Total Maintenance of Plant		2,127	\$	23,400.00										
Administrative Technology Services														

Somerset Academy Vero Beach - 6-8

	YEAR 3													
	100% Enrollment													
Internal Technology Support	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Technology Personnel	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Systems Operation	910	910	910	910	910	910	910	910	910	910	910	910	\$	10,924.20
Systems Planning & Analysis	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
<i>Sub-Total Administrative Technology Services</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>910</i>	<i>\$</i>	<i>10,924.20</i>
After Care Programs														
After Care Salary	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Fringe Benefits	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
<i>Sub-Total After Care Programs</i>													<i>\$</i>	
Debt Service														
Redemption of Principal	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Interest (Interest Only at 6%)	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
<i>Sub-Total Debt Service</i>													<i>\$</i>	
Contingency														
Operating expense contingency - 3% of FEFP - Considered restricted funds														67,872 \$ 67,871.60
<i>Sub-Total Contingency</i>														<i>67,872 \$ 67,871.60</i>
Total Expenditures	\$ 58,865.51	\$ 151,799.92	\$ 214,762.18	\$ 218,824.14	\$ 179,652.56	\$ 179,652.56	\$ 183,020.85	\$ 179,652.56	\$ 187,152.56	\$ 183,020.85	\$ 179,652.56	\$ 294,342.16	\$	2,210,392.39
Excess of Revenues over Expenditures	\$ 162,517.13	\$ 16,278.63	\$ (31,588.02)	\$ (25,149.97)	\$ 14,021.61	\$ 14,021.61	\$ 10,853.31	\$ 14,021.61	\$ 6,521.61	\$ 10,853.31	\$ 14,021.61	\$ (100,868.00)	\$	105,304.41
Fund Balance	\$ 162,517.13	\$ 178,795.75	\$ 147,207.73	\$ 122,057.76	\$ 136,079.36	\$ 150,100.97	\$ 160,754.28	\$ 174,775.89	\$ 181,297.49	\$ 191,950.80	\$ 205,972.41	\$ 105,304.41		

Somerset Academy Vero Beach - 6-8

	YEAR 4												100 % Enrollment	
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun		
	REVENUES													
State Sources with expected enrollment	171,434	171,434	171,434	171,434	171,434	171,434	171,434	171,434	171,434	171,434	171,434	171,434	171,434	\$ 2,057,207.98
Federal Sources - NSLP funds 60% of students			10,246	10,246	10,246	10,246	10,246	10,246	10,246	10,246	10,246	10,246	10,246	\$ 102,461.75
Local Sources - Lunch program paid students			5,157	5,157	5,157	5,157	5,157	5,157	5,157	5,157	5,157	5,157	\$ 51,574.71	
Capital Outlay (Available 1st Year - Advance/Ed Accredited)				7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	\$ 64,500.00
Other Sources - Services				3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	\$ 30,000.00
Previous Years Balance Carry Forward	105,304													\$ 105,304.41
	276,738	171,434	186,838	197,338	197,338	197,338	197,338	197,338	197,338	197,338	197,338	197,338	197,338	\$ 2,411,048.86
EXPENDITURES														
Instruction														
Salaries (includes classroom teachers, contract or hourly, and teacher aides)		28,686	60,241	60,241	60,241	60,241	60,241	60,241	60,241	60,241	60,241	60,241	60,241	\$ 631,095.09
Fringe Benefits		6,598	13,855	13,855	13,855	13,855	13,855	13,855	13,855	13,855	13,855	13,855	13,855	\$ 145,151.87
Contracted Professional Services (includes Therapists & other contracted instructional services)				1,910	1,910	1,910	1,910	1,910	1,910	1,910	1,910	1,910	1,910	\$ 17,191.57
Classroom Supplies & Equipment		4,728	4,728	4,871										\$ 14,326.31
Teacher Supplies		3,677	3,677	3,789										\$ 11,142.68
Textbooks and/or ebooks/Student Activities				9,718										\$ 29,448.52
Supplemental instructional materials (CIRP/SIRP and Technology)			7,879	8,118										\$ 23,877.18
Digital Education Content Materials (Leased)												47,754		\$ 47,754.36
Computer - Equipment for Instruction (leased)		8,825	8,825	9,092										\$ 26,742.44
Computer Lab - Including Software														\$ -
Sub-Total Instruction		70,111	108,924	111,889	76,006	76,006	76,006	76,006	76,006	76,006	76,006	76,006	123,761	\$ 946,730.03
Pupil Personnel Services														
Salaries (includes counselor, school nurse, health assistant)			4,457	4,457	4,457	4,457	4,457	4,457	4,457	4,457	4,457	4,457	4,457	\$ 44,570.74
Fringe Benefits			1,025	1,025	1,025	1,025	1,025	1,025	1,025	1,025	1,025	1,025	1,025	\$ 10,251.27
Contracted Professional Services (counseling and psychological)			3,247	3,247	3,247	3,247	3,247	3,247	3,247	3,247	3,247	3,247	3,247	\$ 32,472.96
Sub-Total Pupil Personnel Services			8,729	8,729	8,729	8,729	8,729	8,729	8,729	8,729	8,729	8,729	8,729	\$ 87,294.97
Media Services														
Salaries (includes Librarian)														\$ -
Fringe Benefits														\$ -
Library Books														\$ -
Audio Visual Materials														\$ -
Sub-Total Media Services														\$ -
Curriculum Development														
Salaries (includes Curriculum Specialist)														\$ -
Fringe Benefits														\$ -
Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	\$ 36,611.68
Development Supplies														\$ -
Student Activities		2,388	2,388											\$ 4,775.44
Sub-Total Curriculum Development	3,051	3,439	5,439	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	3,051	\$ 41,387.11
Staff Development														
Workshops/Trainings		7,500							7,500					\$ 15,000.00
Travel														\$ -
Professional Services														\$ -
Sub-Total Staff Development		7,500							7,500					\$ 15,000.00

Somerset Academy Vero Beach - 6-8

													YEAR 4	
													100 % Enrollment	
Instruction Related Technology														
Salaries (includes Technology Personnel)	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Fringe Benefits	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
EduSoft Software and Scanner	637	637											\$	1,273.45
Hardware Maintenance			660	660	660	660	660	660	660	660	660	660	\$	5,942.76
Computer Learning Labs	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Sub-Total Instruction Related Technology		637	637	660	660	660	660	660	660	660	660	660	\$	7,216.21
Board														
Professional Services (Legal)	2,653												\$	2,653.02
Insurance (General Liability, D&O, Professional Liability)	3,436		3,436				3,436				3,436		\$	13,742.64
Travel	2,122												\$	2,122.42
Sub-Total Board	8,211			3,436			3,436				3,436		\$	18,518.08
General Administration														
Management Fees (Portion of the \$450 fee charged by ESP)	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	\$	71,631.54
Administrative Fee	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Sub-Total General Administration	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	\$	71,631.54
School Administration														
Salaries (includes Principal, Secretary & other Office Personnel)	9,551	9,551	9,551	9,551	9,551	9,551	9,551	9,551	9,551	9,551	9,551	9,551	\$	114,610.46
Fringe Benefits	2,197	2,197	2,197	2,197	2,197	2,197	2,197	2,197	2,197	2,197	2,197	2,197	\$	26,360.41
Equipment Rental / Lease	318	318	318	318	318	318	318	318	318	318	318	318	\$	3,820.35
Travel				637									\$	636.72
Advertising and Promotion	531	531	531										\$	1,591.81
License Fees	212												\$	212.24
Dues and Subscriptions	1,273												\$	1,273.45
Postage			74	74	74	74	74	74	74	74	74	74	\$	742.85
Printing	1,671	152	152	152	152	152	152	152	152	152	152	152	\$	3,342.81
Office Supplies	1,875	511	511	511	511	511	511	511	511	511	511	511	\$	7,500.00
Office Equipment	1,592												\$	1,591.81
Computer Equipment	531												\$	530.60
Sub-Total School Administration	19,751	13,260	13,334	13,440	12,804	12,804	12,804	12,804	12,804	12,804	12,804	12,804	\$	162,213.51
Facilities Acquisition & Construction														
Building Lease / Rent (see budget summary for calculation)		26,821	26,821	26,821	26,821	26,821	26,821	26,821	26,821	26,821	26,821	26,821	\$	295,036.29
Remodeling & Renovations	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Purchase of Buildings & Fixed Equipment	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Land	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Sub-Total Facilities Acquisition & Construction		26,821	26,821	26,821	26,821	26,821	26,821	26,821	26,821	26,821	26,821	26,821	\$	295,036.29
Fiscal Services														
Salaries (Business Manager, Accounting & Bookkeeping Personnel)	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Fringe Benefits	-	-	-	-	-	-	-	-	-	-	-	-	\$	-
Fee to County School Board - up to 250 students	6,958	6,958	6,958	6,958	6,958	6,958	6,958	6,958	6,958	6,958	6,958	6,958	\$	83,490.58
Planning, Research, Development and Evaluation (Part of ESP's Fee)	2,918	2,918	2,918	2,918	2,918	2,918	2,918	2,918	2,918	2,918	2,918	2,918	\$	35,019.86
Professional Services - Annual Audit	752	752	752	752	752	752	752	752	752	752	752	752	\$	9,020.27
Sub-Total Fiscal Services	10,628	10,628	10,628	10,628	10,628	10,628	10,628	10,628	10,628	10,628	10,628	10,628	\$	127,530.72
Food Services														
Salaries (Food Service Workers)			1,486	1,486	1,486	1,486	1,486	1,486	1,486	1,486	1,486	1,486	\$	14,856.91
Fringe Benefits			342	342	342	342	342	342	342	342	342	342	\$	3,417.09
Food			-	-	-	-	-	-	-	-	-	-	\$	-
Food, Materials & Supplies - Vendor provided meals 90% Participation			12,687	12,687	12,687	12,687	12,687	12,687	12,687	12,687	12,687	12,687	\$	126,873.78
Equipment Rental / Lease (provided by food vendor)			-	-	-	-	-	-	-	-	-	-	\$	-
Inspection fees			16	16	16	16	16	16	16	16	16	16	\$	159.18
Sub-Total Food Services			14,531	14,531	14,531	14,531	14,531	14,531	14,531	14,531	14,531	14,531	\$	145,306.97

Somerset Academy Vero Beach - 6-8

													YEAR 4	
													100 % Enrollment	
Pupil Transportation Services														
Salaries (Drivers & Transportation workers)														\$ -
Fringe Benefits														\$ -
Contracted Transportation Services - \$235 per bus per day 40% utilization			9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	\$ 95,400.00
Field Trip Expenses for competitions														\$ -
Buses														\$ -
Repairs & Maintenance														\$ -
Fuel														\$ -
Sub-Total Pupil Transportation Services			9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	\$ 95,400.00
Operation of Plant														
Salaries (Custodian, crossing guards, security)	1,839	1,839	1,839	1,839	1,839	1,839	1,839	1,839	1,839	1,839	1,839	1,839	1,839	\$ 22,073.98
Fringe benefits	423	423	423	423	423	423	423	423	423	423	423	423	423	\$ 5,077.01
Purchased Service (Custodial, fire and alarm, etc)	3,095	3,095	3,095	3,095	3,095	3,095	3,095	3,095	3,095	3,095	3,095	3,095	3,095	\$ 37,142.28
Lawn Maintenance	248	248	248	248	248	248	248	248	248	248	248	248	248	\$ 2,971.38
Pest Control	50	50	50	50	50	50	50	50	50	50	50	50	50	\$ 594.28
Security Services	318	318	318	318	318	318	318	318	318	318	318	318	318	\$ 3,820.35
Property Insurance	2,352	2,352	2,352	2,352	2,352	2,352	2,352	2,352	2,352	2,352	2,352	2,352	2,352	\$ 28,228.13
Telephone Services	318	318	318	318	318	318	318	318	318	318	318	318	318	\$ 3,820.35
Water & Sewer	99	99	99	99	99	99	99	99	99	99	99	99	99	\$ 1,188.55
Electricity	2,724	2,724	2,724	2,724	2,724	2,724	2,724	2,724	2,724	2,724	2,724	2,724	2,724	\$ 32,685.21
Custodial Supplies & Equipment														\$ -
Sub-Total Operation of Plant	11,467	11,467	11,467	11,467	11,467	11,467	11,467	11,467	11,467	11,467	11,467	11,467	11,467	\$ 137,601.52
Maintenance of Plant														
Repairs & Maintenance		2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	\$ 23,400.00
Supplies														\$ -
Sub-Total Maintenance of Plant		2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	\$ 23,400.00
Administrative Technology Services														
Internal Technology Support														\$ -
Technology Personnel														\$ -
Systems Operation	929	929	929	929	929	929	929	929	929	929	929	929	929	\$ 11,142.68
Systems Planning & Analysis														\$ -
Sub-Total Administrative Technology Services	929	929	929	929	929	929	929	929	929	929	929	929	929	\$ 11,142.68
After Care Programs														
After Care Salary														\$ -
Fringe Benefits														\$ -
Sub-Total After Care Programs														\$ -
Debt Service														
Redemption of Principal														\$ -
Interest (Interest Only at 6%)														\$ -
Sub-Total Debt Service														\$ -
Contingency														
Operating expense contingency - 3% of FEFP - Considered restricted funds													69,172	\$ 69,172.33
Sub-Total Contingency													69,172	\$ 69,172.33
Total Expenditures	\$ 60,005.32	\$ 154,887.43	\$ 219,074.26	\$ 223,217.45	\$ 183,262.44	\$ 183,262.44	\$ 186,698.10	\$ 183,262.44	\$ 190,762.44	\$ 186,698.10	\$ 183,262.44	\$ 300,189.13	\$ 2,254,581.97	
Excess of Revenues over Expenditures	\$ 216,733.09	\$ 16,546.57	\$ (32,236.61)	\$ (25,679.80)	\$ 14,075.21	\$ 14,075.21	\$ 10,639.55	\$ 14,075.21	\$ 6,575.21	\$ 10,639.55	\$ 14,075.21	\$ (102,951.49)	\$ 156,466.89	
Fund Balance	\$ 216,733.09	\$ 233,279.66	\$ 201,043.05	\$ 175,163.24	\$ 189,238.45	\$ 203,313.66	\$ 213,953.21	\$ 228,028.41	\$ 234,603.62	\$ 245,243.17	\$ 259,318.38	\$ 156,466.89		

Somerset Academy Vero Beach - 6-8

													YEAR 5	
													100 % Enrollment	
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun		
REVENUES														
State Sources with expected enrollment	174,863	174,863	174,863	174,863	174,863	174,863	174,863	174,863	174,863	174,863	174,863	174,863	174,863	\$ 2,098,352.14
Federal Sources - NSLP funds 60% of students			10,451	10,451	10,451	10,451	10,451	10,451	10,451	10,451	10,451	10,451	10,451	\$ 104,510.99
Local Sources - Lunch program paid students			5,261	5,261	5,261	5,261	5,261	5,261	5,261	5,261	5,261	5,261	5,261	\$ 52,606.20
Capital Outlay (Available 1st Year - Advance/Ed Accredited)			7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	7,167	\$ 84,500.00
Other Sources - Services			3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	\$ 30,000.00
Previous Years Balance Carry Forward	156,467													\$ 156,466.89
	331,330	174,863	190,574	201,074	201,074	201,074	201,074	201,074	201,074	201,074	201,074	201,074	201,074	\$ 2,506,436.23
EXPENDITURES														
Instruction														
Salaries (includes classroom teachers, contract or hourly, and teacher aides)		29,260	61,446	61,446	61,446	61,446	61,446	61,446	61,446	61,446	61,446	61,446	61,446	\$ 643,716.99
Fringe Benefits		6,730	14,133	14,133	14,133	14,133	14,133	14,133	14,133	14,133	14,133	14,133	14,133	\$ 148,054.91
Contracted Professional Services (includes Therapists & other contracted instructional services)			1,948	1,948	1,948	1,948	1,948	1,948	1,948	1,948	1,948	1,948	1,948	\$ 17,535.40
Classroom Supplies & Equipment		4,822	4,822	4,968										\$ 14,612.83
Teacher Supplies		3,751	3,751	3,864										\$ 11,365.54
Textbooks and/or ebooks/Student Activities		9,912	9,912	10,213										\$ 30,037.49
Supplemental instructional materials (CRP/SIRP and Technology)		8,037	8,037	8,281										\$ 24,354.72
Digital Education Content Materials (Leased)												48,709		\$ 48,709.45
Computer - Equipment for Instruction (leased)		9,002	9,002	9,274										\$ 27,277.29
Computer Lab - Including Software														\$ -
Sub-Total Instruction		71,513	111,102	114,127	77,527	77,527	77,527	77,527	77,527	77,527	77,527	77,527	126,236	\$ 965,664.63
Pupil Personnel Services														
Salaries (includes counselor, school nurse, health assistant)			4,546	4,546	4,546	4,546	4,546	4,546	4,546	4,546	4,546	4,546	4,546	\$ 45,462.15
Fringe Benefits			1,046	1,046	1,046	1,046	1,046	1,046	1,046	1,046	1,046	1,046	1,046	\$ 10,456.29
Contracted Professional Services (counseling and psychological)			3,312	3,312	3,312	3,312	3,312	3,312	3,312	3,312	3,312	3,312	3,312	\$ 33,122.42
Sub-Total Pupil Personnel Services			8,904	8,904	8,904	8,904	8,904	8,904	8,904	8,904	8,904	8,904	8,904	\$ 89,040.87
Media Services														
Salaries (includes Librarian)														\$ -
Fringe Benefits														\$ -
Library Books														\$ -
Audio Visual Materials														\$ -
Sub-Total Media Services														\$ -
Curriculum Development														
Salaries (includes Curriculum Specialist)														\$ -
Fringe Benefits														\$ -
Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	\$ 37,343.91
Development Supplies														\$ -
Student Activities		2,435	2,435											\$ 4,870.94
Sub-Total Curriculum Development	3,112	5,547	5,547	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	3,112	\$ 42,214.85
Staff Development														
Workshops/Trainings		7,500												\$ 15,000.00
Travel									7,500					\$ -
Professional Services														\$ -
Sub-Total Staff Development		7,500							7,500					\$ 15,000.00
Instruction Related Technology														
Salaries (includes Technology Personnel)														\$ -
Fringe Benefits														\$ -
EduSoft Software and Scanner		649	649											\$ 1,298.92
Hardware Maintenance				674	674	674	674	674	674	674	674	674	674	\$ 6,061.62
Computer Learning Labs														\$ -
Sub-Total Instruction Related Technology		649	649	674	674	674	674	674	674	674	674	674	674	\$ 7,360.54
Board														
Professional Services (Legal)	2,706													\$ 2,706.08
Insurance (General Liability, D&O, Professional Liability)	3,504			3,504			3,504			3,504				\$ 14,017.50
Travel	2,165													\$ 2,164.86
Sub-Total Board	8,375			3,504			3,504			3,504				\$ 18,888.44
General Administration														
Management Fees (Portion of the \$450 fee charged by ESP)	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	\$ 73,064.17
Administrative Fee														\$ -
Sub-Total General Administration	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	6,089	\$ 73,064.17

Somerset Academy Vero Beach - 6-8

													YEAR 5	
													100 % Enrollment	
School Administration														
Salaries (Includes Principal, Secretary & other Office Personnel)	9,742	9,742	9,742	9,742	9,742	9,742	9,742	9,742	9,742	9,742	9,742	9,742	9,742	\$ 116,902.67
Fringe Benefits	2,241	2,241	2,241	2,241	2,241	2,241	2,241	2,241	2,241	2,241	2,241	2,241	2,241	\$ 26,887.61
Equipment Rental / Lease	325	325	325	325	325	325	325	325	325	325	325	325	325	\$ 3,896.76
Travel				649										\$ 649.46
Advertising and Promotion	541	541	541											\$ 1,623.65
License Fees	216													\$ 216.49
Dues and Subscriptions	1,299													\$ 1,298.92
Postage			76	76	76	76	76	76	76	76	76	76	76	\$ 757.70
Printing	1,705	155	155	155	155	155	155	155	155	155	155	155	155	\$ 3,408.66
Office Supplies	1,875	511	511	511	511	511	511	511	511	511	511	511	511	\$ 7,500.00
Office Equipment	1,624													\$ 1,623.65
Computer Equipment	541													\$ 541.22
Sub-Total School Administration	20,109	13,515	13,591	13,699	13,049	\$ 165,307.78								
Facilities Acquisition & Construction														
Building Lease / Rent (see budget summary for calculation)		27,626	27,626	27,626	27,626	27,626	27,626	27,626	27,626	27,626	27,626	27,626	27,626	\$ 303,887.38
Remodeling & Renovations														\$ -
Purchase of Buildings & Fixed Equipment														\$ -
Land														\$ -
Sub-Total Facilities Acquisition & Construction		27,626	\$ 303,887.38											
Fiscal Services														
Salaries (Business Manager, Accounting & Bookkeeping Personnel)														\$ -
Fringe Benefits														\$ -
Fee to County School Board - up to 250 students	7,097	7,097	7,097	7,097	7,097	7,097	7,097	7,097	7,097	7,097	7,097	7,097	7,097	\$ 85,160.40
Planning, Research, Development and Evaluation (Part of ESP's Fee)	2,977	2,977	2,977	2,977	2,977	2,977	2,977	2,977	2,977	2,977	2,977	2,977	2,977	\$ 35,720.26
Professional Services - Annual Audit	767	767	767	767	767	767	767	767	767	767	767	767	767	\$ 9,200.67
Sub-Total Fiscal Services	10,840	\$ 130,081.33												
Food Services														
Salaries (Food Service Workers)			1,515	1,515	1,515	1,515	1,515	1,515	1,515	1,515	1,515	1,515	1,515	\$ 15,154.05
Fringe Benefits			349	349	349	349	349	349	349	349	349	349	349	\$ 3,485.43
Food														\$ -
Food, Materials & Supplies - Vendor provided meals 90% Participation			12,941	12,941	12,941	12,941	12,941	12,941	12,941	12,941	12,941	12,941	12,941	\$ 129,411.28
Equipment Rental / Lease (provided by food vendor)														\$ -
Inspection fees			16	16	16	16	16	16	16	16	16	16	16	\$ 162.36
Sub-Total Food Services			14,821	\$ 148,213.11										
Pupil Transportation Services														
Salaries (Drivers & Transportation workers)														\$ -
Fringe Benefits														\$ -
Contracted Transportation Services - \$235 per bus per day 40% utilization			9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	9,540	\$ 95,400.00
Field Trip Expenses for competitions														\$ -
Buses														\$ -
Repairs & Maintenance														\$ -
Fuel														\$ -
Sub-Total Pupil Transportation Services			9,540	\$ 95,400.00										
Operation of Plant														
Salaries (Custodian, crossing guards, security)	1,876	1,876	1,876	1,876	1,876	1,876	1,876	1,876	1,876	1,876	1,876	1,876	1,876	\$ 22,515.45
Fringe benefits	432	432	432	432	432	432	432	432	432	432	432	432	432	\$ 5,178.55
Purchased Service (Custodial, fire and alarm, etc)	3,157	3,157	3,157	3,157	3,157	3,157	3,157	3,157	3,157	3,157	3,157	3,157	3,157	\$ 37,885.13
Lawn Maintenance	253	253	253	253	253	253	253	253	253	253	253	253	253	\$ 3,030.81
Pest Control	51	51	51	51	51	51	51	51	51	51	51	51	51	\$ 606.16
Security Services	325	325	325	325	325	325	325	325	325	325	325	325	325	\$ 3,896.76
Property Insurance	2,399	2,399	2,399	2,399	2,399	2,399	2,399	2,399	2,399	2,399	2,399	2,399	2,399	\$ 28,792.70
Telephone Services	325	325	325	325	325	325	325	325	325	325	325	325	325	\$ 3,896.76
Water & Sewer	101	101	101	101	101	101	101	101	101	101	101	101	101	\$ 1,212.32
Electricity	2,778	2,778	2,778	2,778	2,778	2,778	2,778	2,778	2,778	2,778	2,778	2,778	2,778	\$ 33,338.91
Custodial Supplies & Equipment														\$ -
Sub-Total Operation of Plant	11,696	\$ 140,353.55												
Maintenance of Plant														
Repairs & Maintenance		2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	2,127	\$ 23,400.00
Supplies														\$ -
Sub-Total Maintenance of Plant		2,127	\$ 23,400.00											
Administrative Technology Services														
Internal Technology Support														\$ -
Technology Personnel														\$ -
Systems Operation	947	947	947	947	947	947	947	947	947	947	947	947	947	\$ 11,365.54

Somerset Academy Vero Beach - 6-8

												YEAR 5	
												100 % Enrollment	
Systems Planning & Analysis	-	-	-	-	-	-	-	-	-	-	-	\$	-
Sub-Total Administrative Technology Services	947	947	947	947	947	947	947	947	947	947	947	\$	11,365.54
After Care Programs												\$	-
After Care Salary												\$	-
Fringe Benefits												\$	-
Sub-Total After Care Programs												\$	-
Debt Service												\$	-
Redemption of Principal												\$	-
Interest (Interest Only at 6%)												\$	-
Sub-Total Debt Service												\$	-
Contingency													
Operating expense contingency - 3% of FEFP - Considered restricted funds												70,499	\$ 70,499.08
Sub-Total Contingency												70,499	\$ 70,499.08
Total Expenditures	\$ 61,167.93	\$ 158,050.62	\$ 223,480.38	\$ 227,706.44	\$ 186,952.33	\$ 186,952.33	\$ 190,456.70	\$ 186,952.33	\$ 194,452.33	\$ 190,456.70	\$ 186,952.33	\$ 306,160.85	\$ 2,299,741.27
Excess of Revenues over Expenditures	\$ 270,161.64	\$ 16,812.06	\$ (32,905.99)	\$ (26,632.04)	\$ 14,122.07	\$ 14,122.07	\$ 10,617.70	\$ 14,122.07	\$ 6,622.07	\$ 10,617.70	\$ 14,122.07	\$ (105,086.46)	\$ 206,694.96
Fund Balance	\$ 270,161.64	\$ 286,973.70	\$ 254,067.71	\$ 227,435.67	\$ 241,557.74	\$ 255,679.81	\$ 266,297.51	\$ 280,419.58	\$ 287,041.65	\$ 297,659.34	\$ 311,781.41	\$ 206,694.96	

Revenue Estimate Worksheet for Somerset Academy Vero Beach - 6-8
Based on the 2015-16 FEFP Conference Report

School District:

Indian River

Year 1

1. 2015-16 FEFP State and Local Funding

Base Student Allocation \$4,154.45

District Cost Differential: 0.9978

Program	Number of FTE (1)	Program Cost Factor (3)	Weighted FTE (2) x (3) (4)	2015-16 Base Funding	
				(WFTE x BSA x DCD)	(5)
101 Basic K-3	0.00	1.115	0.0000	\$	-
111 Basic K-3 with ESE Services	0.00	1.115	0.0000	\$	-
102 Basic 4-8	195.00	1.000	195.0000	\$	808,335
112 Basic 4-8 with ESE Services	28.00	1.000	28.0000	\$	116,069
103 Basic 9-12	0.00	1.005	0.0000	\$	-
113 Basic 9-12 with ESE Services	0.00	1.005	0.0000	\$	-
254 ESE Level 4 (Grade Level PK-3)		3.613	0.0000	\$	-
254 ESE Level 4 (Grade Level 4-8)		3.613	0.0000	\$	-
254 ESE Level 4 (Grade Level 9-12)		3.613	0.0000	\$	-
255 ESE Level 5 (Grade Level PK-3)		5.258	0.0000	\$	-
255 ESE Level 5 (Grade Level 4-8)		5.258	0.0000	\$	-
255 ESE Level 5 (Grade Level 9-12)		5.258	0.0000	\$	-
130 ESOL (Grade Level PK-3)	0.00	1.180	0.0000	\$	-
130 ESOL (Grade Level 4-8)	12.00	1.180	14.1600	\$	58,698
130 ESOL (Grade Level 9-12)	0.00	1.180	0.0000	\$	-
300 Career Education (Grades 9-12)		1.005	0.0000	\$	-
Totals	235.00		237.1600	\$	983,102

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

Additional FTE (a)	Number of FTE	2015-16 Base Funding (WFTE x BSA x DCD)	
Advanced Placement		\$	-
International Baccalaureate		\$	-
Advanced International Certificate		\$	-
Industry Certified Career Education		\$	-
Early High School Graduation		\$	-
Small District ESE Supplement		\$	-
Total Additional FTE	0.0000	Additional Base Funds	\$ -
Total Funded Weighted FTE	237.1600	Total Base Funding	\$ 983,102

2. ESE Guaranteed Allocation:

FTE	Grade Level	Matrix Level	Guarantee Per Student	
0.00	PK-3	251	\$ 999	\$ -
	PK-3	252	\$ 3,227	\$ -
	PK-3	253	\$ 6,586	\$ -
28.00	4-8	251	\$ 1,121	\$ 31,388
	4-8	252	\$ 3,348	\$ -
	4-8	253	\$ 6,707	\$ -
0.00	9-12	251	\$ 798	\$ -
	9-12	252	\$ 3,025	\$ -
	9-12	253	\$ 6,384	\$ -
Total FTE with ESE Services	28.00		Total ESE Guarantee	\$ 31,388

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's

UFTE share. Charter School UFTE: 235.00 ÷ District's Total UFTE: 17,692.63
= 1.3282%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's

WFTE share. Charter School WFTE: 237.16 ÷ District's Total WFTE: 19,194.47
= 1.2356%

4. Supplemental Academic Instruction (UFTE share)	(b)	<u>3,584,647</u>	x	1.3282%	\$	<u>47,611</u>
5. Discretionary Millage Compression Allocation .748 Mills (UFTE share)	(b)	<u>0</u>	x	1.3282%	\$	<u>-</u>
6. Digital Classrooms Allocation (UFTE share)	(b)(d)	<u>519,424</u>	x	1.3282%	\$	<u>6,899</u>
7. Safe Schools Allocation (UFTE share)	(b)	<u>403,501</u>	x	1.3282%	\$	<u>5,359</u>
8. Instructional Materials Allocation (UFTE share)	(b)	<u>1,319,618</u>	x	1.3282%	\$	<u>17,527</u>
Dual Enrollment Instructional Materials Allocation	(e)					
ESE Applications Allocation:						

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

9. Declining Enrollment (WFTE share)	(c)	<u>0</u>	x	1.2356%	\$	<u>-</u>
10. Sparsity Supplement (WFTE share)	(c)	<u>0</u>	x	1.2356%	\$	<u>-</u>
11. Discretionary Local Effort (WFTE share)	(c)	<u>11,108,382</u>	x	1.2356%	\$	<u>137,255</u>
12. Proration to Funds Available (WFTE share)	(c)	<u>0</u>	x	1.2356%	\$	<u>-</u>
13. Discretionary Lottery (WFTE share)	(c)	<u>63,227</u>	x	1.2356%	\$	<u>781</u>

14. Class Size Reduction Funds:

	Weighted FTE (not including Add-On)	X	DCD	X	Allocation factors	=	
PK - 3	0.0000		0.9978		1,313.27	=	<u>0</u>
4-8	237.1600		0.9978		895.79	=	<u>211,978</u>
9-12	0.0000		0.9978		897.95	=	<u>0</u>
Total *	<u>237.1600</u>						Total Class Size Reduction Funds \$ <u>211,978</u>

(*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

15. Student Transportation	(f)					
Enter All Adjusted Fundable Riders		<u>94</u>	x	396	\$	<u>37,224</u>
Enter All Adjusted ESE Riders			x	1,485	\$	<u>-</u>

16. Federally Connected Student Supplement

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
Military and Indian Lands		\$0.00	\$0.00	\$ -
Civilians on Federal Lands		\$0.00	\$0.00	\$ -
Students with Disabilities			\$0.00	\$ -
Total				\$ -

17. Florida Teachers Classroom Supply Assistance Program

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

Total \$ 1,479,124

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

If you have more than a 75% ESE student population, please place a 1 in the following box:

(j)		\$	<u>-</u>
Average Revenue per Student:	\$		<u>6,294</u>

NOTES:

- (a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.
- (b) District allocations multiplied by percentage from item 3A.
- (c) District allocations multiplied by percentage from item 3B.
- (d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(1)(f), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with 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 unweighted full-time equivalent students.

Administrative fees:

Administrative 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 categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 5%.

For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 2%.

Other:

FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.

Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.

Revenue Estimate Worksheet for Somerset Academy Vero Beach - 6-8
Based on the 2015-16 FEFP Conference Report

School District:

Indian River

Year 2

1. 2015-16 FEFP State and Local Funding

Base Student Allocation

\$4,154.45

District Cost Differential: 0.9978

Program	Number of FTE (1)	Program Cost Factor (3)	Weighted FTE (2) x (3) (4)	2015-16 Base Funding (WFTE x BSA x DCD) (5)	
101 Basic K-3	0.00	1.115	0.0000	\$	-
111 Basic K-3 with ESE Services	0.00	1.115	0.0000	\$	-
102 Basic 4-8	249.00	1.000	249.0000	\$	1,032,182
112 Basic 4-8 with ESE Services	36.00	1.000	36.0000	\$	149,231
103 Basic 9-12	0.00	1.005	0.0000	\$	-
113 Basic 9-12 with ESE Services	0.00	1.005	0.0000	\$	-
254 ESE Level 4 (Grade Level PK-3)		3.613	0.0000	\$	-
254 ESE Level 4 (Grade Level 4-8)		3.613	0.0000	\$	-
254 ESE Level 4 (Grade Level 9-12)		3.613	0.0000	\$	-
255 ESE Level 5 (Grade Level PK-3)		5.258	0.0000	\$	-
255 ESE Level 5 (Grade Level 4-8)		5.258	0.0000	\$	-
255 ESE Level 5 (Grade Level 9-12)		5.258	0.0000	\$	-
130 ESOL (Grade Level PK-3)	0.00	1.180	0.0000	\$	-
130 ESOL (Grade Level 4-8)	15.00	1.180	17.7000	\$	73,372
130 ESOL (Grade Level 9-12)	0.00	1.180	0.0000	\$	-
300 Career Education (Grades 9-12)		1.005	0.0000	\$	-
Totals	300.00		302.7000	\$	1,254,785

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

Additional FTE (a)	Number of FTE	2015-16 Base Funding (WFTE x BSA x DCD)	
Advanced Placement		\$	-
International Baccalaureate		\$	-
Advanced International Certificate		\$	-
Industry Certified Career Education		\$	-
Early High School Graduation		\$	-
Small District ESE Supplement		\$	-
Total Additional FTE	0.0000	Additional Base Funds	\$ -
Total Funded Weighted FTE	302.7000	Total Base Funding	\$ 1,254,785

2. ESE Guaranteed Allocation:	FTE	Grade Level	Matrix		Guarantee Per	
			Level		Student	
	0.00	PK-3	251	\$	999	\$ -
Additional Funding from the ESE Guaranteed		PK-3	252	\$	3,227	\$ -
Allocation. Enter the FTE from 111,112 and		PK-3	253	\$	6,586	\$ -
113 by grade and matrix level. Students who do	36.00	4-8	251	\$	1,121	\$ 40,356
not have a matrix level should be considered		4-8	252	\$	3,348	\$ -
251. This total should equal all FTE from		4-8	253	\$	6,707	\$ -
programs 111, 112 and 113 above.	0.00	9-12	251	\$	798	\$ -
		9-12	252	\$	3,025	\$ -
		9-12	253	\$	6,384	\$ -
Total FTE with ESE Services	36.00			Total ESE Guarantee	\$	40,356

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 300.00 ÷ District's Total UFTE: 17,692.63
 = 1.6956%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 302.70 ÷ District's Total WFTE: 19,194.47
 = 1.5770%

4. Supplemental Academic Instruction (UFTE share)	(b)	<u>3,584,647</u>	x	1.6956%	\$	<u>60,781</u>
5. Discretionary Millage Compression Allocation .748 Mills (UFTE share)	(b)	<u>0</u>	x	1.6956%	\$	<u>-</u>
6. Digital Classrooms Allocation (UFTE share)	(b)(d)	<u>519,424</u>	x	1.6956%	\$	<u>8,807</u>
7. Safe Schools Allocation (UFTE share)	(b)	<u>403,501</u>	x	1.6956%	\$	<u>6,842</u>
8. Instructional Materials Allocation (UFTE share)	(b)	<u>1,319,618</u>	x	1.6956%	\$	<u>22,375</u>
Dual Enrollment Instructional Materials Allocation	(e)					
ESE Applications Allocation:						
Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.						
9. Declining Enrollment (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
10. Sparsity Supplement (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
11. Discretionary Local Effort (WFTE share)	(c)	<u>11,108,382</u>	x	1.5770%	\$	<u>175,179</u>
12. Proration to Funds Available (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
13. Discretionary Lottery (WFTE share)	(c)	<u>63,227</u>	x	1.5770%	\$	<u>997</u>

14. Class Size Reduction Funds:

Weighted FTE (not including Add-On)	X	DCD	X	Allocation factors	=	
PK - 3	0.0000	0.9978	1,313.27		=	<u>0</u>
4-8	302.7000	0.9978	895.79		=	<u>270,559</u>
9-12	0.0000	0.9978	897.95		=	<u>0</u>
Total *	<u>302.7000</u>					Total Class Size Reduction Funds \$ <u>270,559</u>

(*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

15. Student Transportation	(f)					
Enter All Adjusted Fundable Riders		<u>120</u>	x	396	\$	<u>47,520</u>
Enter All Adjusted ESE Riders			x	1,485	\$	<u>-</u>

16. Federally Connected Student Supplement

(g)

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
Military and Indian Lands		\$0.00	\$0.00	\$ -
Civilians on Federal Lands		\$0.00	\$0.00	\$ -
Students with Disabilities			\$0.00	\$ -
Total				\$ -

17. Florida Teachers Classroom Supply Assistance Program

(h)

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

(i)

Total \$ 1,888,201

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

(j)

If you have more than a 75% ESE student population, please place a 1 in the following box:		\$	<u>-</u>
Average Revenue per Student:	\$		<u>6,294</u>
Revenue Increase from Previous Year			<u>2%</u>
Adjusted Revenue Per Student	\$		<u>6,419.88</u>

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(1)(i), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with 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 unweighted full-time equivalent students.

Administrative fees:

Administrative 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 categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 5%.

For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 2%.

Other:

FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.

Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.

Revenue Estimate Worksheet for Somerset Academy Vero Beach - 6-8
Based on the 2015-16 FEFP Conference Report

School District:

Indian River

Year 3

1. 2015-16 FEFP State and Local Funding

Base Student Allocation \$4,154.45 District Cost Differential: 0.9978

Program	Number of FTE (1)	Program Cost Factor (3)	Weighted FTE (2) x (3) (4)	2015-16
				Base Funding (WFTE x BSA x DCD) (5)
101 Basic K-3	0.00	1.115	0.0000	\$ -
111 Basic K-3 with ESE Services	0.00	1.115	0.0000	\$ -
102 Basic 4-8	249.00	1.000	249.0000	\$ 1,032,182
112 Basic 4-8 with ESE Services	36.00	1.000	36.0000	\$ 149,231
103 Basic 9-12	0.00	1.005	0.0000	\$ -
113 Basic 9-12 with ESE Services	0.00	1.005	0.0000	\$ -
254 ESE Level 4 (Grade Level PK-3)		3.613	0.0000	\$ -
254 ESE Level 4 (Grade Level 4-8)		3.613	0.0000	\$ -
254 ESE Level 4 (Grade Level 9-12)		3.613	0.0000	\$ -
255 ESE Level 5 (Grade Level PK-3)		5.258	0.0000	\$ -
255 ESE Level 5 (Grade Level 4-8)		5.258	0.0000	\$ -
255 ESE Level 5 (Grade Level 9-12)		5.258	0.0000	\$ -
130 ESOL (Grade Level PK-3)	0.00	1.180	0.0000	\$ -
130 ESOL (Grade Level 4-8)	15.00	1.180	17.7000	\$ 73,372
130 ESOL (Grade Level 9-12)	0.00	1.180	0.0000	\$ -
300 Career Education (Grades 9-12)		1.005	0.0000	\$ -
Totals	300.00		302.7000	\$ 1,254,785

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

Additional FTE (a)	Number of FTE	2015-16
		Base Funding (WFTE x BSA x DCD)
Advanced Placement		\$ -
International Baccalaureate		\$ -
Advanced International Certificate		\$ -
Industry Certified Career Education		\$ -
Early High School Graduation		\$ -
Small District ESE Supplement		\$ -
Total Additional FTE	0.0000	Additional Base Funds \$ -
Total Funded Weighted FTE	302.7000	Total Base Funding \$ 1,254,785

2. ESE Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student
	0.00	PK-3	251	\$ 999
		PK-3	252	\$ 3,227
Additional Funding from the ESE Guaranteed Allocation. Enter the FTE from 111,112 and 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. This total should equal all FTE from programs 111, 112 and 113 above.	36.00	PK-3	253	\$ 6,586
		4-8	251	\$ 1,121
		4-8	252	\$ 3,348
		4-8	253	\$ 6,707
	0.00	9-12	251	\$ 798
		9-12	252	\$ 3,025
		9-12	253	\$ 6,384
Total FTE with ESE Services	36.00			Total ESE Guarantee \$ 40,356

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 300.00 ÷ District's Total UFTE: 17,692.63 = 1.6956%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 302.70 ÷ District's Total WFTE: 19,194.47 = 1.5770%

4. Supplemental Academic Instruction (UFTE share)	(b)	<u>3,584,647</u>	x	1.6956%	\$	<u>60,781</u>
5. Discretionary Millage Compression Allocation .748 Mills (UFTE share)	(b)	<u>0</u>	x	1.6956%	\$	<u>-</u>
6. Digital Classrooms Allocation (UFTE share)	(b)(d)	<u>519,424</u>	x	1.6956%	\$	<u>8,807</u>
7. Safe Schools Allocation (UFTE share)	(b)	<u>403,501</u>	x	1.6956%	\$	<u>6,842</u>
8. Instructional Materials Allocation (UFTE share)	(b)	<u>1,319,618</u>	x	1.6956%	\$	<u>22,375</u>
Dual Enrollment Instructional Materials Allocation	(e)					
ESE Applications Allocation:						

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

9. Declining Enrollment (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
10. Sparsity Supplement (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
11. Discretionary Local Effort (WFTE share)	(c)	<u>11,108,382</u>	x	1.5770%	\$	<u>175,179</u>
12. Proration to Funds Available (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
13. Discretionary Lottery (WFTE share)	(c)	<u>63,227</u>	x	1.5770%	\$	<u>997</u>

14. Class Size Reduction Funds:

	Weighted FTE (not including Add-On)	X	DCD	X	Allocation factors	=	
PK - 3	0.0000		0.9978		1,313.27	=	<u>0</u>
4-8	302.7000		0.9978		895.79	=	<u>270,559</u>
9-12	0.0000		0.9978		897.95	=	<u>0</u>
Total *	<u>302.7000</u>						Total Class Size Reduction Funds \$ <u>270,559</u>

(*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

15. Student Transportation

	(f)					
Enter All Adjusted Fundable Riders		<u>120</u>	x	396	\$	<u>47,520</u>
Enter All Adjusted ESE Riders			x	1,485	\$	<u>-</u>

16. Federally Connected Student Supplement

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
Military and Indian Lands		\$0.00	\$0.00	\$ -
Civilians on Federal Lands		\$0.00	\$0.00	\$ -
Students with Disabilities			\$0.00	\$ -
Total				\$ -

17. Florida Teachers Classroom Supply Assistance Program

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

Total \$ 1,888,201

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

If you have more than a 75% ESE student population, please place a 1 in the following box:

	(j)		\$	<u>-</u>
Average Revenue per Student:		\$		<u>6,294</u>
Revenue Increase from Previous Year				<u>2%</u>
Adjusted Revenue Per Student		\$		<u>6,548.28</u>

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(1)(i), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with 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 unweighted full-time equivalent students.

Administrative fees:

Administrative 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 categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 5%.

For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 2%.

Other:

FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.

Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.

Revenue Estimate Worksheet for Somerset Academy Vero Beach - 6-8
Based on the 2015-16 FEFP Conference Report

School District:

Indian River

Year 4

1. 2015-16 FEFP State and Local Funding

Base Student Allocation

\$4,154.45

District Cost Differential: 0.9978

Program	Number of FTE	Program Cost Factor	Weighted FTE (2) x (3)	2015-16 Base Funding	
				(WFTE x BSA x DCD)	
(1)	(2)	(3)	(4)	(5)	(5)
101 Basic K-3	0.00	1.115	0.0000	\$	-
111 Basic K-3 with ESE Services	0.00	1.115	0.0000	\$	-
102 Basic 4-8	249.00	1.000	249.0000	\$	1,032,182
112 Basic 4-8 with ESE Services	36.00	1.000	36.0000	\$	149,231
103 Basic 9-12	0.00	1.005	0.0000	\$	-
113 Basic 9-12 with ESE Services	0.00	1.005	0.0000	\$	-
254 ESE Level 4 (Grade Level PK-3)		3.613	0.0000	\$	-
254 ESE Level 4 (Grade Level 4-8)		3.613	0.0000	\$	-
254 ESE Level 4 (Grade Level 9-12)		3.613	0.0000	\$	-
255 ESE Level 5 (Grade Level PK-3)		5.258	0.0000	\$	-
255 ESE Level 5 (Grade Level 4-8)		5.258	0.0000	\$	-
255 ESE Level 5 (Grade Level 9-12)		5.258	0.0000	\$	-
130 ESOL (Grade Level PK-3)	0.00	1.180	0.0000	\$	-
130 ESOL (Grade Level 4-8)	15.00	1.180	17.7000	\$	73,372
130 ESOL (Grade Level 9-12)	0.00	1.180	0.0000	\$	-
300 Career Education (Grades 9-12)		1.005	0.0000	\$	-
Totals	300.00		302.7000	\$	1,254,785

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

Additional FTE (a)	Number of FTE	2015-16 Base Funding	
		(WFTE x BSA x DCD)	
Advanced Placement		\$	-
International Baccalaureate		\$	-
Advanced International Certificate		\$	-
Industry Certified Career Education		\$	-
Early High School Graduation		\$	-
Small District ESE Supplement		\$	-
Total Additional FTE	0.0000	Additional Base Funds	\$ -
Total Funded Weighted FTE	302.7000	Total Base Funding	\$ 1,254,785

2. ESE Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student	
				\$	\$
	0.00	PK-3	251	\$ 999	\$ -
		PK-3	252	\$ 3,227	\$ -
		PK-3	253	\$ 6,586	\$ -
Additional Funding from the ESE Guaranteed Allocation. Enter the FTE from 111,112 and 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. This total should equal all FTE from programs 111, 112 and 113 above.	36.00	4-8	251	\$ 1,121	\$ 40,356
		4-8	252	\$ 3,348	\$ -
		4-8	253	\$ 6,707	\$ -
	0.00	9-12	251	\$ 798	\$ -
		9-12	252	\$ 3,025	\$ -
		9-12	253	\$ 6,384	\$ -
Total FTE with ESE Services	36.00			Total ESE Guarantee	\$ 40,356

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 300.00 ÷ District's Total UFTE: 17,692.63 = 1.6956%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 302.70 ÷ District's Total WFTE: 19,194.47 = 1.5770%

4. Supplemental Academic Instruction (UFTE share)	(b)	<u>3,584,647</u>	x	1.6956%	\$	<u>60,781</u>
5. Discretionary Millage Compression Allocation .748 Mills (UFTE share)	(b)	<u>0</u>	x	1.6956%	\$	<u>-</u>
6. Digital Classrooms Allocation (UFTE share)	(b)(d)	<u>519,424</u>	x	1.6956%	\$	<u>8,807</u>
7. Safe Schools Allocation (UFTE share)	(b)	<u>403,501</u>	x	1.6956%	\$	<u>6,842</u>
8. Instructional Materials Allocation (UFTE share)	(b)	<u>1,319,618</u>	x	1.6956%	\$	<u>22,375</u>
Dual Enrollment Instructional Materials Allocation	(e)					
ESE Applications Allocation:						

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

9. Declining Enrollment (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
10. Sparsity Supplement (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
11. Discretionary Local Effort (WFTE share)	(c)	<u>11,108,382</u>	x	1.5770%	\$	<u>175,179</u>
12. Proration to Funds Available (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
13. Discretionary Lottery (WFTE share)	(c)	<u>63,227</u>	x	1.5770%	\$	<u>997</u>

14. Class Size Reduction Funds:

Weighted FTE (not including Add-On)	X	DCD	X	Allocation factors	=	
PK - 3	0.0000	0.9978	1,313.27		=	<u>0</u>
4-8	302.7000	0.9978	895.79		=	<u>270,559</u>
9-12	0.0000	0.9978	897.95		=	<u>0</u>
Total *	<u>302.7000</u>					Total Class Size Reduction Funds \$ <u>270,559</u>

(*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

15. Student Transportation	(f)					
Enter All Adjusted Fundable Riders		<u>120</u>	x	396	\$	<u>47,520</u>
Enter All Adjusted ESE Riders			x	1,485	\$	<u>-</u>

16. Federally Connected Student Supplement

(g)

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
Military and Indian Lands		\$0.00	\$0.00	\$ -
Civilians on Federal Lands		\$0.00	\$0.00	\$ -
Students with Disabilities			\$0.00	\$ -
Total				\$ -

17. Florida Teachers Classroom Supply Assistance Program

(h)

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

(i)

Total \$ 1,888,201

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

(j)

If you have more than a 75% ESE student population, please place a 1 in the following box:		\$	<u>-</u>
Average Revenue per Student:	\$		<u>6,294</u>
Revenue Increase from Previous Year			<u>2%</u>
Adjusted Revenue Per Student	\$		<u>6,679.25</u>

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(l)(i), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 9003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with 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 unweighted full-time equivalent students.

Administrative fees:

Administrative 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 categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 5%.

For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 2%.

Other:

FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.

Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.

Revenue Estimate Worksheet for Somerset Academy Vero Beach - 6-8
Based on the 2015-16 FEFP Conference Report

School District:

Indian River

Year 5

1. 2015-16 FEFP State and Local Funding

Base Student Allocation \$4,154.45

District Cost Differential: 0.9978

Program	Number of FTE (1)	Program Cost Factor (3)	Weighted FTE (2) x (3) (4)	2015-16 Base Funding (WFTE x BSA x DCD) (5)	
101 Basic K-3	0.00	1.115	0.0000	\$	-
111 Basic K-3 with ESE Services	0.00	1.115	0.0000	\$	-
102 Basic 4-8	249.00	1.000	249.0000	\$	1,032,182
112 Basic 4-8 with ESE Services	36.00	1.000	36.0000	\$	149,231
103 Basic 9-12	0.00	1.005	0.0000	\$	-
113 Basic 9-12 with ESE Services	0.00	1.005	0.0000	\$	-
254 ESE Level 4 (Grade Level PK-3)		3.613	0.0000	\$	-
254 ESE Level 4 (Grade Level 4-8)		3.613	0.0000	\$	-
254 ESE Level 4 (Grade Level 9-12)		3.613	0.0000	\$	-
255 ESE Level 5 (Grade Level PK-3)		5.258	0.0000	\$	-
255 ESE Level 5 (Grade Level 4-8)		5.258	0.0000	\$	-
255 ESE Level 5 (Grade Level 9-12)		5.258	0.0000	\$	-
130 ESOL (Grade Level PK-3)	0.00	1.180	0.0000	\$	-
130 ESOL (Grade Level 4-8)	15.00	1.180	17.7000	\$	73,372
130 ESOL (Grade Level 9-12)	0.00	1.180	0.0000	\$	-
300 Career Education (Grades 9-12)		1.005	0.0000	\$	-
Totals	300.00		302.7000	\$	1,254,785

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

Additional FTE (a)	Number of FTE	2015-16 Base Funding (WFTE x BSA x DCD)	
Advanced Placement		\$	-
International Baccalaureate		\$	-
Advanced International Certificate		\$	-
Industry Certified Career Education		\$	-
Early High School Graduation		\$	-
Small District ESE Supplement		\$	-
Total Additional FTE	0.0000	Additional Base Funds	\$ -
Total Funded Weighted FTE	302.7000	Total Base Funding	\$ 1,254,785

2. ESE Guaranteed Allocation:

FTE	Grade Level	Matrix Level	Guarantee Per Student	
0.00	PK-3	251	\$ 999	\$ -
	PK-3	252	\$ 3,227	\$ -
	PK-3	253	\$ 6,586	\$ -
36.00	4-8	251	\$ 1,121	\$ 40,356
	4-8	252	\$ 3,348	\$ -
	4-8	253	\$ 6,707	\$ -
0.00	9-12	251	\$ 798	\$ -
	9-12	252	\$ 3,025	\$ -
	9-12	253	\$ 6,384	\$ -
Total FTE with ESE Services	36.00	Total ESE Guarantee	\$	40,356

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 300.00 ÷ District's Total UFTE: 17,692.63 = 1.6956%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 302.70 ÷ District's Total WFTE: 19,194.47 = 1.5770%

4. Supplemental Academic Instruction (UFTE share)	(b)	<u>3,584,647</u>	x	1.6956%	\$	<u>60,781</u>
5. Discretionary Millage Compression Allocation .748 Mills (UFTE share)	(b)	<u>0</u>	x	1.6956%	\$	<u>-</u>
6. Digital Classrooms Allocation (UFTE share)	(b)(d)	<u>519,424</u>	x	1.6956%	\$	<u>8,807</u>
7. Safe Schools Allocation (UFTE share)	(b)	<u>403,501</u>	x	1.6956%	\$	<u>6,842</u>
8. Instructional Materials Allocation (UFTE share)	(b)	<u>1,319,618</u>	x	1.6956%	\$	<u>22,375</u>
Dual Enrollment Instructional Materials Allocation	(e)					
ESE Applications Allocation:						

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

9. Declining Enrollment (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
10. Sparsity Supplement (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
11. Discretionary Local Effort (WFTE share)	(c)	<u>11,108,382</u>	x	1.5770%	\$	<u>175,179</u>
12. Proration to Funds Available (WFTE share)	(c)	<u>0</u>	x	1.5770%	\$	<u>-</u>
13. Discretionary Lottery (WFTE share)	(c)	<u>63,227</u>	x	1.5770%	\$	<u>997</u>

14. Class Size Reduction Funds:

	<u>Weighted FTE (not including Add-On)</u>	X	<u>DCD</u>	X	<u>Allocation factors</u>	=	
PK - 3	0.0000		0.9978		1,313.27	=	<u>0</u>
4-8	302.7000		0.9978		895.79	=	<u>270,559</u>
9-12	0.0000		0.9978		897.95	=	<u>0</u>
Total *	<u>302.7000</u>				<u>Total Class Size Reduction Funds</u>	\$	<u>270,559</u>

(*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

15. Student Transportation	(f)					
Enter All Adjusted Fundable Riders		<u>120</u>	x	396	\$	<u>47,520</u>
Enter All Adjusted ESE Riders			x	1,485	\$	<u>-</u>

16. Federally Connected Student Supplement (g)

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aide Student Allocation	Total
Military and Indian Lands		\$0.00	\$0.00	\$ -
Civilians on Federal Lands		\$0.00	\$0.00	\$ -
Students with Disabilities			\$0.00	\$ -
Total				<u>\$ -</u>

17. Florida Teachers Classroom Supply Assistance Program (h)

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation (i)

Total \$ 1,888,201

20. Funding for the purpose of calculating the administrative fee for ESE charter schools. (j)

If you have more than a 75% ESE student population, please place a 1 in the following box: \$ -

Average Revenue per Student:	\$	<u>6,294</u>
Revenue Increase from Previous Year		<u>2%</u>
Adjusted Revenue Per Student	\$	<u>6,812.83</u>

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(1)(i), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with 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 unweighted full-time equivalent students.

Administrative fees:

Administrative 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 categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 5%.

For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for 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 fee withheld may only be used 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 school population into 250. Multiply that fraction times the funds available, then times 2%.

Other:

FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.

Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.

Appendix C - Sample ESP Agreement

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 that 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 of 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 an act or neglect of Service Provider or Servicer 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 Servicer 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 of 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 _____ 201____. 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

Appendix D - Job Descriptions

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: 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.

Appendix E - Sample Parent Contract

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

Appendix G - High Performing Verification Letter

FLORIDA DEPARTMENT OF EDUCATION



STATE BOARD OF EDUCATION

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Pam Stewart
Commissioner of Education



September 4, 2013

Ms. Kim Guilarte-Gil
Principal
Somerset Academy Middle School South Miami Campus
c/o Christine McGuinn
6340 Sunset Drive
South Miami, Florida 33143

Dear Principal Guilarte-Gil:

This letter serves as notification that the Florida Department of Education has verified that Somerset Academy Middle School South Miami Campus (13-6053) currently meets the criteria for high-performing charter school status pursuant to section 1002.331, Florida Statutes.

If you have any questions, please contact the Office of Independent Education and Parental Choice at 850-245-0502 or via email 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,


Pam Stewart

PS/jh

cc: Ms. Tiffanie Pauline, Charter School Liaison

Appendix G – Lender Commitment Letter



buildinghope

QUALITY/RESULTS/GROWTH FOR PUBLIC CHARTER SCHOOLS

July 1, 2015

RE: Somerset Academy Middle School Vero Beach, Miami, FL

To whom it may concern:

Building Hope is a non-profit foundation based in Washington, DC that works to close the educational achievement gap by giving students access to high quality public charter schools in cities across the country. We support the expansion of academically successful schools with the capacity to grow their enrollments in order to catalyze change across their local public education systems by providing technical and financial assistance related to capital projects. Our services may also include grants to pay for professional fees associated with a project (i.e., architect, engineering), or other project-specific needs and sponsoring school fundraising events to support the academic program.

Building Hope is committed to support Somerset Academy, Inc. in securing a long-range plan for the opening of the above-referenced charter school. In order to ensure that the charter school is able to secure working capital for opening, Building Hope can offer a number of different services including facility and working capital financing. Building Hope may provide such financial assistance to the charter school by:

- Lending funds to for facilities acquisitions and/or improvements at below-market rates.
- Guaranteeing, insuring, and reinsuring debt used to assist charter schools to acquire, renovate, or construct school facilities.
- Guaranteeing or insuring leases of personal or real property that are needed to begin or continue the operation of the charter schools.
- Facilitating financing by potential lenders.
- Facilitating the issuance of bonds by charter schools or other public entities for the benefit of charter schools.
- Credit Enhancement Program

In addition, if the charter school is unable to secure a start-up grant, Building Hope can secure a line of credit for the school to help with the startup costs. Building Hope provides loan guarantees to make facilities financing more affordable for public charter schools throughout the United States. Guarantees range in size from \$250,000 to \$1 million. They have a five-year term with a 1% commitment fee and a 1% annual guaranty fee.

Sincerely,

S. Joseph Bruno
President

Sddendum B & C

B: Schools Operated by the Governing Board

C: ESP Operated Schools

Addendum B - Applicant History Worksheet
Schools Currently or Previously Operated by Governing Board

Form IEPC-M1A
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
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

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
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

Form IEPC-M1A
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
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

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,"
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 B - Applicant History Worksheet
Schools Currently or Previously Operated by Governing Board**

**Form IEPC-M1A
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
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	527/54%	A	\$153,993	4%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	174/46%	A	\$291,211	24%	No
Dade	Somerset Academy (Silver Palms)	13-0332	948/80%	N/A	\$496,376	7%	No
Dade	Somerset Academy High School (Miami-Dade)	13-7042	286/81%	A	\$692,019	31%	No
Dade	Somerset Academy High School (South Campus)	13-7038	17/82%	N/A	\$105,205	56%	No
Dade	Somerset Preparatory Academy at Silver Palms	13-4012	N/A	N/A	\$496,376	7%	No
Dade	Somerset City Arts Academy	13-2012	209/33%	A	\$28,373	2%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	10/10%	N/A	\$29,985	29%	No
Dade	Somerset Oaks Academy	13-3033	N/A	N/A			No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	425/14%	A	\$402,182	9%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	73/8%	A	\$47,509	10%	No
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	292/67%	A	\$418,590	18%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	104/65%	A	\$168,647	23%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	N/A	N/A			No
Dade	Somerset Gables Academy	13-5008	57/2%	N/A	\$23,497	3%	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	795/27%	A	\$29,985	29%	No
Broward	Somerset Academy	06-5141	862/31%	A	\$1,394,864	17%	No
Broward	Somerset Academy High School	06-5221	703/36%	A	\$738,552	14%	No
Broward	Somerset Arts Conservatory	06-5396	76/36%	A	\$331,080	61%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	695/55%	A	\$2,475,131	40%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	396/55%	A	\$595,337	20%	No
Broward	Somerset Academy Miramar South	06-5054	N/A	N/A			No
Broward	Somerset Academy (Davie)	06-5211	142/42%	A	\$627,236	55%	No
Broward	Somerset Academy East Preparatory	06-5391	232/73%	A	\$391,536	19%	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	306/81%	C	\$339,736	12%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	92/87%	C	\$8,652	1%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	440/81%	D	\$203,298	6%	No

**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	1,603/ 93%	N/A	N/A	N/A	N/A
Dade	Mater Academy East Charter School	13-3100	Active	621/ 86%	N/A	N/A	N/A	N/A
Dade	Mater Academy East Charter Middle School	13-6009	Active	333/96%	N/A	N/A	N/A	N/A
Dade	Mater Academy East Charter High School	13-7037	Active	339/96%	N/A	N/A	N/A	N/A
Dade	Mater Academy of International Studies	13-1017	Active	553/98%	N/A	N/A	N/A	N/A
Dade	Mater Academy Middle School of International Studies	13-6047	Active	188/94%	N/A	N/A	N/A	N/A
Dade	Mater Academy High School of International Studies	13-7024	Active	20/100%	N/A	N/A	N/A	N/A
Dade	Mater Academy Middle School	13-6012	Active	1,351/87%	N/A	N/A	N/A	N/A
Dade	Mater Academy High School	13-7160	Active	1,742/84%	N/A	N/A	N/A	N/A
Dade	Mater Performing Arts & Entertainment Academy	13-7014	Active	333/81%	N/A	N/A	N/A	N/A
Dade	Mater Gardens Academy Elementary School	13-0312	Active	582/53%	N/A	N/A	N/A	N/A
Dade	Mater Gardens Academy Middle School	13-6042	Active	218/60%	N/A	N/A	N/A	N/A
Dade	Mater Lakes Academy Middle School	13-6033	Active	845/78%	N/A	N/A	N/A	N/A
Dade	Mater Lakes Academy High School	13-7018	Active	1,143/76%	N/A	N/A	N/A	N/A
Dade	Mater Academy (Miami Beach)	13-5047	Active	532/70%	N/A	N/A	N/A	N/A
Dade	Mater Academy High School (Miami Beach)	13-7025	Active	30/87%	N/A	N/A	N/A	N/A
Dade	Mater Grove Academy	13-5045	Active	182/58%	N/A	N/A	N/A	N/A
Dade	Mater Brickell Preparatory School	13-5046	Active	172/53%	N/A	N/A	N/A	N/A
Dade	Mater Academy at Mt. Sinai	13-5054	Active	146/58%	N/A	N/A	N/A	N/A
Dade	Mater Academy	13-5384	Active	565/95%	N/A	N/A	N/A	N/A
Dade	Mater Academy Middle School	13-6014	Active	768/90%	N/A	N/A	N/A	N/A
Dade	Mater Preparatory Academy High School	13-7090	Active	383/87%	N/A	N/A	N/A	N/A
Dade	Mater Academy Virtual Middle School	13-6997	Active	23/48%	N/A	N/A	N/A	N/A
Dade	Sports Leadership and Management Charter Middle School	13-6015	Active	568/86%	N/A	N/A	N/A	N/A
Dade	Sports Leadership and Management Charter High School	13-7016	Active	394/87%	N/A	N/A	N/A	N/A
Dade	Ben Gamla Charter School	13-5022	Active	249/36%	N/A	N/A	N/A	N/A
Dade	City of Hialeah Educational Academy	13-7262	Active	613/87%	N/A	N/A	N/A	N/A
Dade	Doral Academy	13-3030	Active	1,143/44%	N/A	N/A	N/A	N/A
Dade	Just Arts and Management Middle School	13-6083	Active	99/56%	N/A	N/A	N/A	N/A
Dade	Doral Academy of Technology	13-3029	Active	185/53%	N/A	N/A	N/A	N/A
Dade	Doral Academy Charter Middle School	13-6030	Active	1,283/58%	N/A	N/A	N/A	N/A
Dade	Doral Academy Charter High School	13-7020	Active	1,515/60%	N/A	N/A	N/A	N/A
Dade	Doral Performing Arts and Entertainment Academy	13-7009	Active	379/54%	N/A	N/A	N/A	N/A
Dade	Theodore R. and Thekla A. Gibson Charter School	13-2060	Active	286/100%	N/A	N/A	N/A	N/A
Dade	Integrated Science and Asian Culture Academy	13-2004	Active	13/77%	N/A	N/A	N/A	N/A
Dade	International Studies Charter Middle School	13-6045	Active	300/63%	N/A	N/A	N/A	N/A
Dade	International Studies Charter High School	13-7007	Active	391/61%	N/A	N/A	N/A	N/A
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	303/15%	N/A	N/A	N/A	N/A
Dade	Pinecrest Preparatory Academy Charter School	13-0600	Active	650/55%	N/A	N/A	N/A	N/A
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	Active	537/64%	N/A	N/A	N/A	N/A
Dade	Pinecrest Preparatory Academy High School	13-7053	Active	477/63%	N/A	N/A	N/A	N/A
Dade	Pinecrest Academy South Campus	13-0342	Active	732/63%	N/A	N/A	N/A	N/A
Dade	Pinecrest Palm Academy	13-4634	Active	18/0%	N/A	N/A	N/A	N/A
Dade	Pinecrest Academy (North Campus)	13-5048	Active	437/66%	N/A	N/A	N/A	N/A
Dade	Pinecrest Academy Middle School (North Campus)	13-6003	Active	22/73%	N/A	N/A	N/A	N/A
Dade	Pinecrest Cove Academy	13-5049	Active	731/56%	N/A	N/A	N/A	N/A
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

**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	1,103/45%	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
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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	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	\$214,699	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 Garbis 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	\$102,599	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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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	445/76%	B	\$1,041,118	29%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	Active	184/78%	A	\$258,177	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	144/44%	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 (Halfandale 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	\$186,061	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	44-0351	Active	118/4%	A	\$222,436	19%	No

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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	Mater Academy	13-5384	Active	N/A	N/A	N/A	N/A	No
Dade	Mater Academy Middle School	13-6014	Active	N/A	N/A	N/A	N/A	No
Dade	Mater 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 (Dawie)	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	\$33,887	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	70/68%	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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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	1032/72%	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	Mater Academy	13-5384	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater Academy Middle School	13-6014	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater 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

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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	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%	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	\$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 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	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	Mater Academy	13-5384	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater Academy Middle School	13-6024	Active	N/A	N/A	N/A	N/A	N/A
Dade	Mater 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	\$1,980	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 - Applicant Worksheet History
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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	292/67%	A	\$418,590	18%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	Active	104/65%	A	\$168,647	25%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	Active	N/A	N/A	N/A	N/A	N/A
Dade	Somerset Gables Academy	13-5008	Active	57/2%	N/A	\$23,497	3%	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	795/27%	A	\$29,985	29%	No
Broward	Somerset Academy	06-5141	Active	862/31%	A	\$1,394,864	17%	No
Broward	Somerset Academy High School	06-5221	Active	703/36%	A	\$738,552	14%	No
Broward	Somerset Arts Conservatory	06-5396	Active	76/36%	A	\$331,080	61%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	Active	695/55%	A	\$2,475,131	40%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	Active	396/55%	A	\$595,337	20%	No
Broward	Somerset Academy Miramar South	06-5054	Active	N/A	N/A	N/A	N/A	N/A
Broward	Somerset Academy (Davie)	06-5211	Active	142/42%	A	\$627,236	55%	No
Broward	Somerset Academy East Preparatory	06-5391	Active	292/73%	A	\$391,536	19%	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	306/81%	C	\$339,736	12%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	Active	92/87%	C	\$8,652	1%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	Active	440/81%	D	\$203,298	6%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	Active	50/71%	N/A	\$8,466	2%	No
Broward	Somerset Academy Neighborhood School	06-5021	Active	78/13%	N/A	\$1,394,864	17%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	Active	73/79%	A	\$103,880	19%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	Active	N/A	N/A	N/A	N/A	N/A
Broward	Somerset Pines Academy	06-5030	Active	270/63%	C	\$118,567	5%	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	566/47%	A	\$8,262	0%	No
Broward	Berr Gamla Charter School (North Campus)	06-5001	Active	19/47%	N/A	\$13,714	7%	No
Broward	Ben Gamla South Broward	06-5392	Active	223/29%	C	\$5,258	0%	No
Broward	Ben Gamla Charter School (Hallandale Campus)	06-5025	Active	N/A	N/A	N/A	N/A	N/A
Broward	Ben Gamla Charter High School	06-5005	Active	N/A	N/A	N/A	N/A	N/A
Orange	Cornerstone Charter Academy	48-0133	Active	696/5%	B	\$232,832	4%	No
Orange	Cornerstone Charter High School	48-0146	Active	162/11%	N/A	\$263,527	21%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	Active	60/57%	N/A	\$24,711	3%	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	198/30%	N/A	\$92,538	5%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	Active	84/31%	A	\$83,172	11%	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	N/A	N/A	N/A	N/A	N/A
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	N/A	N/A	N/A	N/A	N/A
Dade	Excelsior Language Academy of Hialeah	13-5029	Active	623/92%	B	\$6,229	3%	No
Dade	Excelsior Academy High School	13-7054	Closed*	34/94%	N/A	\$6,229	3%	No
Brevard	Odyssey Charter School	05-6807	Active	565/52%	B	\$1,213,999	25%	No
Brevard	Palm Bay Community Charter	05-6519	Closed*	739/77%	C	-\$3,593,918	-61%	No
Brevard	Palm Bay Municipal Charter High School	05-6520	Closed*	44/77%	N/A	N/A	N/A	N/A
Orange	Pinecrest Preparatory Charter High School (Orlando Campus)	48-0162	Closed*	7/0%	N/A	\$256	1%	No
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 - Supporting Documentation

THE NATIONAL BEN GAMLA CHARTER SCHOOL FOUNDATION, INC.

BEN GAMLA CHARTER SCHOOL – PINELLAS

Status as of date of application: Closed

Date Charter School Closed: June 30, 2013

Reason(s) for closure: Voluntary Closure by the Governing Board of the Charter School

Documentation Attached:

- Letter from Pinellas County Schools District accepting the National Ben Gamla Charter School Foundation, Inc.'s decision to voluntarily close "Ben Gamla Charter School – Pinellas"
- Agreement for Termination of Charter School between the National Ben Gamla Charter School Foundation, Inc., and The School Board of Pinellas County, Florida, acknowledging:
 - Ben Gamla's decision to terminate the charter school;
 - The District's acceptance of Ben Gamla's decision;
 - The mutual agreement to close the Charter School and cease school operations effective June 30, 2013.

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. Wake

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

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,
Board Chair

THE SCHOOL BOARD OF PINELLAS
COUNTY, FLORIDA

By: _____

Michael A. Grego, Ed.D.
Superintendent

Its: _____

Attest: _____

By its: _____

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 13, 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



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
Andrew P. Lannon, Esq.

Exhibit
"B"

5240 Babcock Street NE • Suite 201 • Palm Bay, Florida 32905-4643 • Telephone 321 409.7185 • Facsimile 321 409.7112

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.

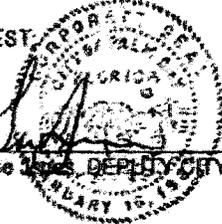
ADJOURNMENT:

There being no further business, the meeting adjourned at the hour of 7:14 P.M.

John J. Mazziotti
John J. Mazziotti, MAYOR

ATTEST

Teresa Jones
Teresa 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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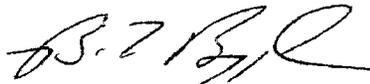
Addendum C - Supporting Documentation

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:

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Please call me if you have any questions or concerns.

Thanks,

Andrew P. Lamm
 Andrew P. Lamm, Esq.

Exhibit

"B"

Addendum C - Supporting Documentation

CITY OF PALM BAY, FLORIDA

SPECIAL COUNCIL MEETING NO. 2011-21

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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 Isnerdi	Present
COUNCILMEMBER:	Michele Paccione	Present
COUNCILMEMBER:	Ken Greene	Present
CITY MANAGER:	Sue Hann	Present
CITY ATTORNEY:	Andrew Larnon	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.

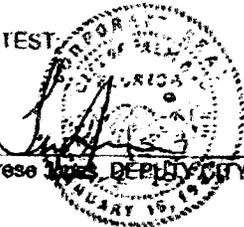
Motion by Mayor Mazziotti, seconded by Deputy Mayor Capote, not to contest or appeal the Notice of Termination. Motion carried with members voting as follows: Mayor Mazziotti, Yea; Deputy Mayor Capote, Yea; Councilwoman Isnardi, Yea; Councilwoman Paccione, Yea; Councilman Greene, Yea.

ADJOURNMENT:

There being no further business, the meeting adjourned at the hour of 7:14 P.M.


John J. Mazziotti, MAYOR

ATTEST


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

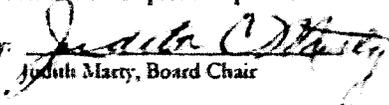
The undersigned hereby certifies that he/she is an Officer and/or Director of PINECREST ACADEMY, INC., a not-for-profit corporation organized and existing under the laws of the State of Florida, and that the following is a true and correct copy of a resolution adopted by the Board of Directors of said 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 Document



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 (OC SB) 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, Joie W Cadle, Daryl Flynn, Kat B Gordon, Pam Gould, Judge Rick Roach, Nancy Robbinson

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)