

Professional Development Core Components: Instructional Staff
<p>Justice), their meaning, how to effectively integrate the Beacons into instruction across content areas, approaches to classroom management and scholar behavior and discipline, stakeholder communication, and their alignment to school culture initiatives.</p> <ul style="list-style-type: none"> • Use of facility: Faculty will receive training and resources for implementation (e.g., sample lesson plans) in order to maximize the learning opportunities embedded into the school design.
<p style="text-align: center;">Returning Teacher Orientation (RTO)</p> <p>RTO is a 5-7 day annual event that includes training on new schoolwide initiatives, safety and procedural protocols, curriculum, and other pertinent information for the new school year. RTO will also mark the first day back for teachers in the new school year. In year one, as described above, RTO will be combined with NTI. Topics will include:</p> <ul style="list-style-type: none"> • Instructional resources for core subjects (ELA, math, science, social studies): Faculty will receive ongoing training and support in the effective delivery of the instructional resources for core subjects. • Instructional Strategies: Faculty will receive ongoing professional learning and support in the effective use of Marzano’s High Probability Instructional Strategies, Blended Learning in Small Group Instruction and Scholar Demonstrations of Learning, Cross-Curricular Instruction and Learning, Cooperative Learning, Multisensory Learning, Direct Instruction (I Do, You Do, We Do), Differentiated Instruction, Socratic Seminar, and Formal Debate.
<p style="text-align: center;">Designated PD Days</p> <p>Full-day PD will be provided in accordance with the school calendar. Content for designated PD days will be based on school need and may include rotations, small-group differentiated activities to meet teacher/grade-level instructional needs, and blended learning. Topics may include current research-based practices aligned to the Education Model, key academic and SEL skill development, classroom behavior, and supporting the health and emotional needs of students.</p>
<p style="text-align: center;">Professional Learning Communities</p> <p>PLCs, as described in Section 3, constitute a key supportive element of the Education Model. Teachers will meet regularly by grade-level or subject-area teams to analyze student data, design units, and create accompanying lessons. Based on administrative walk-throughs and student academic performance, teachers will be provided with specific, differentiated development opportunities. During PLCs, teachers will reflect on instructional units and benchmarks/standards pacing and discuss potential revisions.</p>
<p style="text-align: center;">CRT Cadre and Bootcamp</p> <p>The CSUSA Florida support team will facilitate meetings with deans and CRTs to calibrate understanding of benchmarks/standards, instruction, accountability measures, and curriculum resources, as well as develop coaching and modeling skills. Additionally, CRTs will be trained in delivery of NTI and implementation of the instructional coaching cycle prior to the start of the school year.</p>
<p style="text-align: center;">Data Chats</p> <p>Data chats, as described in Section 3, will take place regularly to ensure effectiveness in data-driven instruction. Data chats will initially be facilitated by the principal, assistant principal, or CRT until grade level teams develop the capacity to analyze data and develop targeted action plans. Data chats will take place at multiple levels, including within the classroom between teachers and students and by grade and subject level facilitated by school leadership. Additionally, on a schoolwide level, the CSUSA Florida Superintendent and Deputy Director will lead data chats with the school’s leadership team.</p>
<p style="text-align: center;">Differentiated PD</p> <p>Teachers are provided differentiated professional development based on pedagogical needs observed, current research, instructional strategies, etc. State team support members may facilitate specific content area training based on data trends across the area or state as well.</p>

Professional Development Days/Hours

The daily schedule will be designed to accommodate common grade and subject-level collaborative planning periods. The sample daily schedules and school calendar submitted as **Attachment B** identify the days throughout the school year that are anticipated for PD.

Section 14: Student Recruitment and Enrollment

A. Describe the plan for recruiting students that will result in the school meeting its projected enrollment. Include strategies for reaching the school's targeted populations and those that might otherwise not have easy access to information on available educational options including, but not limited to, families in poverty; academically low-achieving students; students with disabilities; and English Language Learners.

SCPA will operate as a "school of choice" and will be open to all eligible students in the state of Florida. This is in compliance with the Controlled Open Enrollment statute § 1002.31(2)(a), F.S., which allows a parent from any school district in the state whose child is not subject to a current expulsion or suspension to enroll his or her child in and transport his or her child to SCPA, as long as the school has not reached capacity. FCEF recognizes the importance of marketing and recruiting specifically to parents and students of Sarasota County, and an enrollment preference will be given to Sarasota County students.

Although students may enroll from any district in the state, marketing to residents in Sarasota County will be the primary focus. To ensure strong demand and create a "wait-list" applicant pool, marketing will be done for all relevant population groups in terms of age and geographic location. Utilizing the school's application and lottery software, applicants will be tracked and ordered appropriately. This provides an opportunity for all students applying to be admitted while ensuring orderly management of achieving enrollment projections across all grade levels.

SCPA will develop and execute a marketing campaign specifically for the local community with four stages in mind: 1) building understanding of families and developing a school identity, 2) generating awareness of the school, 3) recruiting through lead and applicant conversion strategies and finally, 4) building relationships and advocacy for the school to retain students and families with a mindset of service to their needs.

Building understanding of families and developing a school identity

SCPA will use the anticipated target area outlined in **Section 2** to inform understanding of the local community. Additionally, feedback from community engagement efforts will also help inform recruitment efforts. Community engagement will include information sessions and attendance at local events, such as events hosted by the chamber of commerce, municipal governments, and community-based organizations. Community input will be considered when developing supplemental programming and activities at SCPA.

School identity and profile and other foundational marketing assets

Once student and community research is gathered, SCPA will solidify its identity within the community in alignment with the school's focus on moral character, civic virtue, rigorous academics, and the development of the whole-child. SCPA will develop marketing assets that provide an overview of the school for the community and families in the target area. This will include web and social sites (Facebook) for the school, signage, and a School Profile/Fact Sheet. The School Profile/Fact Sheet will be developed as a hard and soft (digital) document and will include:

- The school's mission to educate scholars through key tenants of classical education grounded in a rigorous and data-driven curriculum.
- The Education Model and related programming.
- School leadership contact information.
- Extracurricular activities and schoolwide events.

Building Awareness & Consideration for Recruitment

Integrated Marketing Strategy: An integrated marketing awareness campaign will be executed to inform the public of the school's opening, encourage enrollment, and support the registration process. The intent of the campaign will be to generate leads and will include offline and online measures. Campaign content will include information on charter schools and programmatic highlights about SCPA. Initiatives and tactics may include but will not be limited to:

- Temporary office to welcome and meet with interested families.
- Local outreach in the community.
- Three-pronged approach to digital advertising that includes display ads, paid search, and social ads.
- Local print media.
- Periodically refreshed/updated information on the school website.
- Continuous updates on the school's Facebook page and Live Facebook events, including Q&A sessions with the leader.
- Distribution of school brochures and flyers highlighting offered programs.
- Signage, such as billboards, displayed in high-traffic areas, and/or main highway exits, and other dense thoroughfares throughout the community.
- In-person and virtual information sessions.
- Local television public service announcements.
- Announcements in area businesses' human resources newsletters.
- Direct mailings and targeted cable television advertisements to the community.
- Partnerships with new construction/development firms and real estate offices to promote the school.
- Building relationships with day care centers.

Nurturing and Supporting Interested Families: Marketing and enrollment efforts will be ongoing with the objective of achieving full enrollment. As contact information from interested families and applications are received, the marketing strategy will shift to helping families feel confident in their choice and guiding them through the enrollment process. Efforts will include:

- Mailing interested families a postcard with additional SCPA information and reminders.
- Providing interested families that have visited the school site or provided contact information with additional messages about the school.
- Conducting follow up phone call and email campaigns at every stage from submission of the enrollment application through school opening.
- Continued distribution of school brochures and flyers.
- Ongoing virtual and in-person presentations/information sessions to neighborhood clubs, libraries, and other local organizations.
- Display signs and flyers throughout the immediate and surrounding communities.
- Open houses and information sessions at the school or the temporary office.
- Participation in local events and maintaining an active presence in key community locations such as retail hotspots, restaurant blocks, and market squares.
- Appropriate sponsorships of community activities.
- Internal company email advertisements through local businesses.

Marketing strategies for "hard-to-reach" populations may include but will not be limited to:

- Digital advertising and radio in Spanish.
- Facilitating information sessions in a variety of locations and languages throughout the community.
- Application and registration forms in multiple languages.
- Advertising that the school may provide uniforms free of charge to families who qualify.
- Production of marketing materials and school applications in languages other than English, as needed to accommodate the needs of the community.
- Availability of bilingual staff to answer questions.
- Posting information in and developing partnerships with local public entities such as libraries, grocery stores, the local YMCA, and other youth clubs within the community.
- Advertising in magazines and newspapers, including free community publications.
- Distribution of information to local businesses' human resources department.

The school's administrative team will make every effort to allow those with limited technology or internet access to submit applications at the school. If families cannot travel to SCPA, they will have the option to call the school or temporary office and allow a staff member to complete an application on their behalf. In addition, students with disabilities and students served in ESOL programs will have an equal opportunity of being selected for enrollment in SCPA per § 1002.33(10)(f), F.S. The school's enrollment application will not request information regarding disability status or academic performance. Furthermore, the school's marketing materials will reflect that it is a tuition-free public charter school and that it serves students with exceptionalities, disabilities, and limited English proficiency.

B. Explain how the school will achieve a racial/ethnic balance reflective of the community it serves or within the racial/ethnic range of other local public schools in accordance with section 1002.33(7)(a)8., F.S.

SCPA will be an open enrollment school of choice and will welcome all students who apply. The school will be committed to enrolling a diverse student population and will abide by the provisions in the Florida Educational Equity Act, § 1000.05(2)(a), F.S., and Florida Statutes that forbid discrimination based on race, nationality, ethnic origin, religion, marital status, sexual orientation, disability, or gender. The lottery process, if necessary, will be completely random and nondiscriminatory.

In compliance with § 1002.33(7), F.S., SCPA will endeavor to achieve racial/ethnic balance through a comprehensive marketing plan. In order for SCPA to achieve a racial/ethnic balance reflective of the community it will serve or within the racial/ethnic range of other public schools in the district, efforts will focus on recruiting students within a 5-mile radius of the school. This will include marketing to underrepresented populations with traditional and digital media both online and in hard-copy form. SCPA will also employ bilingual staff to communicate with parents and families as necessary in addition to the methods described above regarding marketing to "hard-to-reach" populations. However, the student population may include children that are from outside the local community due to the school's compliance with § 1002.31(2)(a), F.S., which states that students are eligible to attend any public school in the state of Florida subject to maximum class size requirements, capacity, and other specified provisions.

C. Describe the school's proposed enrollment policies and procedures, including an explanation of the enrollment timeline, any preferences for enrollment and lottery process. Provide proposed enrollment application as Attachment S.

SCPA will admit students of any race, nationality, ethnic origin, religion, marital status, sexual orientation, disability, or gender. Pursuant to § 1002.33(10)(b), F.S., SCPA will enroll an eligible student who submits a timely application unless the number of applications exceed the capacity of a program, class, grade level, or building. In such cases, all applicants who submit an application by the enrollment deadline will have an equal chance of being admitted through a random selection process. Enrollment also follows § 1002.33(7)(a)8, F.S., which includes enrolling students according to racial/ethnic balance provisions.

In accordance with § 1002.33(10)(d), F.S., SCPA will give enrollment preference to the following populations:

- Students who are siblings of a student enrolled in SCPA If siblings apply together and one sibling receives an offer; the other sibling will be given preference on the waiting list. Siblings are defined as individuals who share both guardianship and residency.
- Students who reside in Sarasota County.
- Students who are the children of a governing board member of SCPA or students who are the children of a CSUSA employee.
- Students who are the children of an active-duty member of any branch of the US Armed Forces.

All preference categories will be published prior to conducting the lottery, and applicants who are entitled to receive a placement preference will be identified prior to the lottery. Preferences granted are subject to review and verification, and SCPA may rescind acceptance offers if the preference status cannot be verified or validated. Siblings who are applying for the first time receive preference only after one of the siblings has been selected in the lottery and offered their seat.

Student applications will be made available online through the SIS which will be accessible on the school's website. The SIS will accept student applications and SCPA will monitor the number of applications submitted for each grade level. The SIS will manage all aspects of the enrollment process, including online applications, application verification, sibling applicant record linking, admission preference management, computerized lottery options, wait-list management, data exports, and statistical reporting. Parents with limited technology or internet access will be given the opportunity to use the resources available at SCPA to submit an application, as stated previously.

Upon submission of an application, sibling linking (if applicable), and preferences will be verified. At each phase of the admission process, the appropriate correspondence will be generated and communicated to each applicant via either email, phone, or mail if necessary. The data will be monitored, and reports will be created to determine the need for a lottery, waitlists, and letters of acceptance. If at the end of the open enrollment period there is an over subscription for any grade level, a lottery will be conducted. In compliance with § 1002.33(10)(b), F.S., the number of seats available will be determined by the capacity minus the number of students who recommit. The lottery is system generated and will be conducted for all grades in which the number of applicants exceeds the number of available seats.

Once all open seats have been randomly filled, the remaining applicants will be placed on a waitlist in order of the lottery results and in accordance with assigned preferences. All offers of enrollment will be made in the order of the lottery results and the established waitlist. No offer will be made to a student not properly entitled to the next available seat. Applicants who apply after the enrollment deadline will be placed on the waitlist in order of preference and submission date. Parents will be notified in writing of their child's acceptance once a seat becomes available and will be provided with a specific timeline in which to respond

with their decision. If an offered applicant decides not to attend SCPA, the slot will be given to the first applicant on the waiting list. All accepted applicants will be provided with the registration requirements, which includes all documentation required by Sarasota County Schools for review and verification. The registration requirements for Sarasota County students currently published on the district website are listed below:

- Grade placement
- Proof of residency
- Proof of immunization
- Original birth certificate
- Social security card (if available)
- Proof of guardianship (if applicable)
- Academic records (for students previously enrolled in another school)
- Copy of IEP (if the child is in an Exceptional Student Education Program)

If an applicant is not included in the lottery but should have been, they may be offered an enrollment seat. If an applicant is offered a seat in the lottery and provided incorrect information that led to a selection, the applicant's offer will be rescinded, and the applicant will be placed back on the waitlist according to the lottery number. Applications will be accepted on an ongoing basis and maintained on a waiting list. Communications to applicants will be generated as appropriate. The tentative enrollment schedule shown below in **Table 14.1** will be used for registering and admitting students and includes a plan for the admission lottery, if necessary. A sample application can be found in **Attachment S**.

Table 14.1

Enrollment Schedule	
Open Enrollment	January – February
Application Verification	January
Notification of Lottery	January
Lottery	February
Student enrollment/Waitlist Notice Sent	February
Registration	February– ongoing

Section 15: Parent and Community Involvement

A. Briefly explain the general plan to engage parents in the life of the school (in addition to any proposed governance roles described in previous sections of this application, if applicable) as well as plans for regular communication with parents about school matters. This *could* include building family-school partnerships to strengthen support for learning, volunteer opportunities, or activities the school will seek from, or offer to parents. This *must* include the governing board's appointment of a representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes, s. 1002.33(7)(d)1., F.S.

To further the school's mission to educate scholars through key tenants of classical education grounded in a rigorous and data-driven curriculum and its vision to cultivate a learning environment that inspires scholarship and nurtures the development of the whole child, active parental participation is essential. To achieve excellence in school and life, parents must be actively involved in their scholar's academic journey and support virtue education. Therefore, the proposed school model will provide families with the knowledge and opportunities to meaningfully participate in their scholar's school life, so they may fulfill their vital role in the delivery of the educational plan and attainment of school goals.

Parental participation in the school's operations and governance will be fostered by:

- Attendance and participation in governing board and PTC meetings.
- Participation in school-wide initiatives and events to support classical framework and foster stakeholder relationships.
- Parent information and parent education events.
- Parent/teacher conferences held to provide a forum for open discussion and to build parent/teacher understanding and support.
- Semi-annual surveys distributed to parents to receive input for school improvement and satisfaction.
- A parental obligation between SCPA, the parent, and student.

The FLDOE Memorandum Opinion Number 03-05 approves the use of parent volunteer contracts that are "consistent with the school's mission and purpose." As such, parents will be asked to volunteer a minimum of 20 hours per school year. When two or more children from the same family are enrolled, parents will be asked to volunteer a total of 30 hours per school year. The principal or other designee verifies the completion of the hours and credit is applied to the family's account. At the time of recommitment (usually January) for the following school year, parents will be sent a letter notifying them of their progress toward completion of their requested volunteer hours. Parents will be provided with numerous volunteer opportunities which can be completed at school or at home, thereby alleviating any possible hardship that may be created for parents that may not be able to complete volunteer hours at SCPA.

Parental involvement is a combination of commitment and active participation on the part of the parent to the school and to the scholar. PTCs will be referred to as *Caritas* and will be organized each school year to allow families opportunities to participate in and provide input for fundraising, volunteering, and operations. The PTC will be comprised of parents of enrolled scholars, administrators, and teachers, and will be considered instrumental in planning and facilitating schoolwide events (e.g., Shakespearean performances, oratorical events, fundraisers, grade-level garden harvests and produce donations, etc.)

The SIS will support continual and meaningful parental involvement in each scholar's education. Progress reports and report cards will be distributed every quarter, and parents will be encouraged to schedule

conferences to discuss student academic performance and progress toward mastery of grade-level benchmarks/standards. SCPA will offer Curriculum Nights for parents to attend and learn about various educational topics (e.g., state assessment information and home-reading strategies), and the essentials of classical teaching and learning. Parent involvement in a child's education is crucial for his or her success, so SCPA will make every effort to keep parents engaged and informed using multiple modes of communication (i.e., email, phone calls, group text messaging, school website, social media, mailers, etc.). Parents will be notified via routine postings regarding the time and place of governing board meetings and will be invited to attend and participate. The principal and CSUSA will be represented at the governing board meetings to discuss all issues pertaining to the management of SCPA. Issues to be discussed will include finance, scholar achievement, interim benchmark results, institutional focus, personnel matters, facility issues, and/or ancillary services issues.

SCPA will appoint a parent representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and help resolve disputes. The parent representative will reside in Sarasota County and their contact information will be provided to parents in addition to being posted on the school's website. FCEF will hold at least two meetings per school year in Sarasota County with the parent representative present and may hold additional meetings at its discretion.

B. Discuss any established community resources that will be available to students and parents, if applicable. Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships including any fee-based or in-kind commitments from community organizations or individuals that will enrich student learning.

Upon approval of this charter application, SCPA will work to develop community partnerships that are in the best interest of the school's programming, its students, and the local community. These community partnerships will enhance the integration of public entities that are charged with the welfare of children and increase the quality of services provided at SCPA. Examples of the type of partnerships expected to be developed include local colleges and universities (e.g., classical and liberal arts institutions), local businesses, civic organizations, public service organizations, and other non-profit organizations with child focused missions to instill moral character and civic virtue, and support the development of the whole-child.

C. Provide, as Attachment T, any existing evidence of demand for the school or support from intended community partners, if available (e.g. letters of intent/commitment, memoranda of understanding, or contracts).

Please see **Attachment T** for supporting demand analysis documentation.

D. Describe the process of appointing a representative to facilitate parental involvement, provide parents access to information, and resolve parental disputes. Include a description of how the dispute resolution procedures are designed to resolve and protect the rights of parents as enumerated in ss. 1001.42(8)(c)1.-6., 1002.20 and 1014.04, F.S.

Please see response to **Section 10, Question L**.

III. BUSINESS PLAN

Section 16: Facilities

If the site is acquired:

- A. Describe the proposed facility, including location, size, and layout of space.
- B. Describe the actions that will be taken to ensure the facility is in compliance with applicable laws, regulations, and policies and is ready for the school's opening.
- C. Describe how the facility aligns with the proposed educational program and other requirements such as mandated class sizes.
- D. Document the anticipated costs for the facility, including renovation, rent, utilities, and maintenance. Identify, if applicable, any funding sources (other than state and local funding) that will be applied to facilities-related costs and include evidence of such (e.g. letter, MOU) as Attachment U. If renting an existing facility, provide draft lease agreement as Attachment V.
- E. Describe the back-up facilities plan. What is the alternate plan for facilities if the proposed facility is not available or is determined to be inappropriate for the school's opening?

If the site is not yet acquired:

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

SCPA's scholar-centered learning environment will cultivate the development of the whole-child through high-quality academic experiences, collaborative learning opportunities, indoor and outdoor learning, and emphasis on civic virtue. All classrooms will incorporate modular furniture to support flexible groupings and differentiated learning. Outdoor gardens will be accessible to all grade levels to enhance learning and provide scholars with hands-on, multisensory learning experiences that encourage connections to the natural world and service to the greater community. Above all, the learning environment will support its mission to educate scholars through key tenants of classical education grounded in a rigorous and data-driven curriculum

In addition, SCPA will encourage the development of 21st century digital and technological literacy through its integration of technology into a variety of learning contexts. To cultivate future-ready leaders, learning spaces will include multipurpose furniture (e.g., desks with dry-erase surfaces to function as an option for scholars to demonstrate their learning), digital white boards to incorporate technology into instruction, and easy access to outdoor learning spaces mentioned in the previous section. The classroom environment is intended as a safe space that encourages collaboration, integration of technology, the development of critical thinking and communication skills through classical resources and instructional approaches, and opportunities to learn and grow as a 21st century digital citizen and scholar.

A potential site for SCPA has been identified. However, at this time several sites are being evaluated, and the actual location of the school may change as indicated in **Section 2**. The site plan will make every effort to accommodate existing neighborhoods and be considerate of local municipal and county planning efforts. The intended campus layout will accommodate a logical separation of grade levels across grades K-12. The facility will meet all applicable commercial and life safety codes and will comply with the Florida Building Code pursuant to chapter 553. The plan is for a newly constructed building that meets the needs of the school's educational plan, promotes a learner-centered culture, and facilitates collaboration, exploration, and academic rigor.

Every aspect of SCPA's school design is intentionally crafted to inspire *scholé* (verb, *Greek*, 'restful learning') throughout the campus. This is done to accomplish the mission and vision of the school and instill the Beacons of virtue within scholars. Through CSUSA's classical approach to education, it is the hope that scholars and the greater school community will develop the strong minds and good hearts required to live a life of virtue and sound moral reasoning. In addition, the following school design features were chosen to support learning, critical thinking and exploration, the acquisition of 21st century skills, and encourage wellness:

- Outdoor learning spaces.
- Grade-level gardens
- Promenade with life-size logic games (e.g., chess, checkers, scrabble) and telescopes
- Outdoor classrooms and performance areas
- Innovation lab with the latest 21st century technology and library with hard-cover classics
- Mercato with open seating that provides healthy food options.
- Playgrounds that are built into the natural landscape of the property with features such as reading boxes or *legere* (verb, *Latin*, 'to read').

The proposed school design at this time includes two buildings. The layout of each building will include different design features (mentioned above) that align to developmentally appropriate program needs to provide scholars with robust learning opportunities throughout their K-12 experience. For instance, the K-7 school building will include playgrounds and spaces for outdoor art, science, and music classrooms and grade level gardens to encourage hands-on, multisensory learning in a natural environment. In addition, the 8-12 building will include access to outdoor amphitheaters and podiums for formal debates and oratorical events, access to an innovation lab to enhance digital and technological literacy, and ample classroom space for college-preparatory courses.

G. Provide an estimate of the costs of the anticipated facility needs and describe how such estimates have been derived. Identify, if applicable, any funding sources (other than state and local funding) that will be applied to facilities-related costs and include evidence of such (e.g. letter, MOU) as Attachment U.

CSUSA has extensive experience acquiring and developing properties to operate charter schools and has been actively engaged in developing the cost model for SCPA. Estimates have been derived based on:

- Industry experience
- Historical projects
- Detailed spreadsheets/models defining cost factors
- Actual cost data, as applicable
- Cost estimates from proposed contractors, as applicable

Using the tools described above, the cost of this facility is estimated to be about \$13-15 million, which includes the cost of due diligence and legal fees, land purchase, architectural and design fees, engineering, site work, and construction expenditures. Please note that these costs are subject to change during the actual facility development process.

Pending approval of this charter application, the school's proposed facility will be built using one of the

following sources of financing: 1) Developer financing that has been bank approved based upon the developer's financial capability, anticipated full time equivalent (FTE) funding, and the success of the governing board's other charter schools. This is a traditional financing and development structure that has been used across the state of Florida and has been reviewed and vetted by several legal teams as well as by the attorneys for the developer/builder, and in their professional opinion, meets all applicable law; 2) Third-party private real estate investor financing; or 3) Tax-exempt bond financing.

H. Explain the strategy and schedule that will be employed to secure an adequate facility

Pending approval of this charter application, the school's facility will begin development. It is anticipated that the facility will be owned and constructed by a private developer, who will then lease the facility to FCEF. SCPA will make rent payments for the facility. The facility lease will be developed and executed as a component of the school's development project plan. Prior to school opening, Sarasota County Schools will be provided with documentation of the facility lease and certification that the building satisfies all requirements for fire, safety, health, and accessibility for the disabled as per § 1002.33(8), F.S. In addition, the facility will meet the requirements of the Florida Fire Prevention Code, pursuant to § 633.208, F.S. as adopted by the authority with jurisdiction. The facility will meet all applicable federal, state, and local building codes, including the Americans with Disabilities Accessibility Guidelines, for new building construction.

The facility project will be managed by CSUSA. CSUSA has opened charter schools ranging in size from 39,000 – 155,000 +/- square feet and is a leader in the design and development of charter schools in the state of Florida. CSUSA has developed schools in a variety of settings, including urban, suburban, rural, and commercial centers. CSUSA will assist FCEF in planning a superior learning environment through its extensive network of architectural firms experienced in designing schools that provide a safe learning environment and operate efficiently and effectively. The design process is accomplished by a team of experts, both in-house and contracted, whose disciplines include education, licensed general contracting, and project management.

Section 22 provides a schedule of the key milestones for the development of SCPA. Detailed project plans will be developed for each phase of the project. All construction and renovation projects undertaken prior to the opening of SCPA or during the term of the charter will be carried out by experienced and appropriately licensed and insured construction professionals who perform all work in accordance with the construction specifications, drawings, and other documents as directed by the design professional.

I. Describe the back-up facilities plan.

If development at the primary location becomes unavailable, then another site in the target area will be identified or an existing building available for conversion will be located. Once construction begins on a site, it will be the long-term facility solution. In the rare event that issuance of the Certificate of Occupancy is not delivered in a timely fashion, FCEF will direct CSUSA to locate short-term alternative facilities options. Any such alternate facility shall be suitable for the school's use until the school is able to open. The temporary facility would fully meet the programmatic and educational needs of students and staff. In the unfortunate event that an adequate school facility or alternative short-term facility cannot be secured, FCEF will request that the approved application be deferred opening for up to three years to provide time for the facility plan to be carried out, fully ensuring safety and compliance in all areas.

Section 17: Transportation Service

Describe the school's plan for transportation to ensure that transportation is not a barrier to equal access for all students residing within a reasonable distance of the school, s. 1002.33(20)(c) F.S.

SCPA may provide transportation through an agreement or contract with a private provider or parents. If necessary, SCPA will contract with a licensed vendor to provide transportation. This agreement or contract will include qualified bus operators, personnel for bus monitoring, fuel, maintenance of the vehicles, and all required training/compliance.

The vendor will furnish proof that it meets or exceeds all applicable rules and regulations governing student transportation. This includes but is not limited to having buses in relatively new condition (typically less than 10 years old), vehicles equipped with GPS and video monitoring, and completion of all required training for bus operators.

If transportation is offered, SCPA agrees to provide transportation to students consistent with the requirements of § 1006.23, F.S. SCPA may provide transportation outside of the reasonable distance for students with disabilities as required by the student's IEP. SCPA will also provide transportation pursuant to the McKinney-Vento Homeless Assistance Act (42 U.S.C. Section 11431, et. seq.) for children and youth experiencing homelessness.

One bus has been included in the budget for transportation in Year 1 at a rate of \$72,000. If necessary, SCPA will budget for additional buses to meet the needs of the student population.

Section 18: Food Service

Describe the school's plan for food services, including any plans for contracting services or plans to participate in the National School Lunch Program. Explain how the school's food service plan will ensure healthy, well-rounded meals for students.

SCPA will comply with the Healthy Hunger-Free Kids Act, which requires school cafeterias to meet federal nutrition standards for school lunches and breakfasts. The school's first preference is to partner with the school district and fall under their National School Lunch Program (NSLP) umbrella as an additional site. If that is not a possibility, then SCPA will pursue a contract for a Food Service Management Company through a formal procurement process. The Request for Proposal will require the selected vendor(s) to provide a quality meal program that includes all the required components of a fully reimbursable meal as per published guidelines. The price per meal quoted during the procurement process shall include the cost of the entrees, side dishes, fresh fruits, vegetables, fresh bread, condiments, plastic wear, trays, and liners. In addition to providing these items, the chosen vendor shall include in their quoted price per meal the cost of food service staffing, all necessary kitchen equipment (ovens, refrigeration, freezers, milk coolers, etc.), equipment maintenance, commodity utilization, food service training, marketing and promotions, delivery of all items to the school, menu planning, and nutritional analysis.

An amount of \$267,176 for contracted food service has been allocated in the budget for Year 1, included in **Attachment X**. If the district does not provide meal service to SCPA thereby falling under the umbrella of the District's NSLP umbrella, then the governing board will appoint a person, usually the NSLP director, to be responsible for completing all necessary NSLP paperwork and/or applications on behalf of SCPA in advance of the school year. If the school's application for participation in this program is not accepted, then the operating budget will be amended to reflect the reduction in revenues associated with reimbursement from the NSLP.

The facility plan will include a multipurpose room, which will mainly be used as a spacious cafeteria and will include multiple serving lines. The serving lines will be set up with the point of service station at the end to ensure that the cafeteria personnel can verify that the students are receiving all the required components that make up a reimbursable meal. SCPA will utilize a computerized point of sale system that will track meals and provide a reporting function for accountability and NSLP claiming. The point-of-sale system will be digitally connected to the SIS, as well as to the online NSLP applications ensuring data integrity. Paper applications will be available to those who need them.

Regardless of account balance, no child will ever be denied a meal. SCPA will ensure that all students receive meals each day, including students who receive either free or reduced-price meals. If a child does not have the funds to purchase a meal, he/she is given a meal which consists of that day's entree, a fruit, and milk. At the end of each month, the cafeteria staff will be responsible for sending the monthly historical edit check report to the NSLP director, which will be used in the submission of the NSLP reimbursement claim.

Section 19: School Safety and Security

Outline the plan for school safety and security for students, staff, the facility, and property, especially as it relates to the applicable provisions in the Marjory Stoneman Douglas High School Public Safety Act. Specifically:

A. Describe what steps the school would take to assure there is a safe-school officer present while school is in session, pursuant to section 1006.12, F.S.

To comply with § 1006.12, F.S., SCPA will attempt to partner with the County Sheriff's Office and/or the local police department to arrange for a School Resource Officer (SRO) to be on campus during designated school hours. If the County Sheriff's Office and/or local police is unable to provide an SRO, SCPA may partner with Integrity, a security program that assists schools in staffing a Safe Schools Officer (SSO). The SSO will be a sworn officer of a state-designated law enforcement agency, such as the Florida Highway Patrol. If the school is unable to provide an SRO or SSO, then SCPA would utilize the Guardian Program to staff a properly trained Guardian or School Security Guard (SSG) through a company such as Dynamic Security Integrated. CSUSA presently contracts with Dynamic Security Integrated for SSG/Guardian primary and/or backfill coverage at several districts throughout the state. The SSO will:

1. Review policies and procedures for compliance with state rules and laws.
2. Provide the necessary training and resources to students and school staff in matters relating to youth mental health awareness and assistance; emergency procedures, including active shooter training; and school safety and security.
3. Serve as a liaison with local public safety agencies and national, state, and community agencies and organizations in matters of school safety and security.
4. Serve on the school's School Based Threat Management Team (SBTMT) if so requested and applicable after proper training and certification.
5. Provide a school security risk assessment/campus tour using the Florida Safe Schools Assessment Tool (FSSAT). Based on the assessment findings, the SSO will recommend strategies and activities to address the findings and improve school safety and security. Annually, FCEF will review the SSO's findings and recommendations at a publicly noticed governing board meeting. The SSO will report the findings and governing board action to the Office of Safe Schools within 30 days after the governing board meeting.
6. Coordinate with the appropriate public safety agencies, as defined in § 365.171, F.S., that are designated as first responders to a school's campus. This process will allow members of the agencies to conduct a tour of the campus once every three years and provide recommendations related to improving school safety. The SSO's recommendations by the public safety agencies must be considered as part of the recommendations.

In the event an SRO is unavailable for contract, the governing board may contract with a security agency as defined in § 493.6101(18), F.S. to employ as a school security guard an individual who holds a Class "D" and Class "G" license pursuant to chapter 493. RECS will ensure compliance with §1006.12(4), F.S. requirements that SSGs be certified through the ARGUS training provided by a qualified Sheriff's Office in the school district.

SCPA will establish an Emergency Management Plan (EMP) which will detail procedures to be followed if an incident occurs at SCPA, or if an incident occurs outside the school that could impact school safety and security. The protocols outlined will be used to respond to natural and human-caused hazards, threats, and emergencies. The EMP will be reviewed annually by SCPA and distributed to all SCPA staff. Annually, the

facilities manager (or designee) will provide copies of site plans/ floor plans and maps to jurisdictional law enforcement agencies and fire departments pursuant to §1013.13, F.S. and the FSSAT. The SSO will ensure a campus tour is provided.

SCPA will annually review policies and procedures within the EMP and acknowledge responsibility for each based upon nationally recognized best practices.

Through CSUSA's partnership with CLPS Consultancy Group (CLPS), a security, protection, and emergency management consulting company, the school will be provided with access to the TAP App Emergency Communication Solution. The TAP App, which is Alyssa's Law compliant, is a multiplatform hazard and threat management crisis communication system. The app works across multiple platforms, including iOS, Android, and Windows. TAP App serves two main functions related to school safety:

1. TAP App Security: Designed to assist schools in responding to, mitigating, and managing emergency situations. This includes both natural and human-caused incidents. TAP App Security will be customized for SCPA and allow staff the ability to communicate in real-time during emergencies.
2. TAP App Student: Designed to provide students with an up-to-date means for reporting behavior that is deemed suspicious and/or threatening. This anonymous student reporting function will provide students with a voice, so SCPA can prevent tragedies and provide early intervention services to students in need.
3. TAP App operates through AT&T-Mutualink, one of the ten pre-approved state vendors selected pursuant to Alyssa's Law.

Pursuant to §1006.07(4), F.S. all Florida public schools, including charters, must implement a mobile panic alert system capable of connecting diverse emergency services technologies to ensure real-time coordination between multiple first responder agencies. This system, known as "Alyssa's Alert," must integrate with local public safety answering point infrastructure to transmit 911 calls and mobile activations. TAP App, which is utilized by all CSUSA-managed charter schools, uses AT&T-Mutualink as its preferred vendor. Separately, TAP App can be installed separately to any Real Time Crime Center (RTCC) and/or 911 dispatch center.

SCPA employees will be required to participate in the TAP App Security program and will be required to watch the TAP App Security training video by August 30th of each year to familiarize themselves with the app and its features. Newly hired staff will be required to watch the training video within 15 days of hire. Additional on-site refresher courses will be offered by CLPS annually at various locations throughout the state. Any school employee can initiate a lockdown through the TAP App system if there is an imminent threat, such as an active shooter/assailant or armed threat. School employees will be permitted to possess their mobile phones during the school day to be used during emergency situations. TAP App is also installed on classroom desktops throughout the school. Access to TAP App Student can be offered to students in 5th grade and above. SCPA administrators will determine the appropriateness for students accessing the anonymous reporting app on a student-by-student basis. As school administrators manage the program as administrator users, student devices with the app installed will be monitored for accountability and misuse.

Agreements are also being coordinated with various state law enforcement agencies to have Tap App installed at police dispatch and/or Real Time Crime Centers so as to immediately notify local law

enforcement in the event of a lockdown.

B. Explain how the school will adopt an active assailant response plan and provide annual training on the plan, as required by section 1006.07(6), F.S.

The governing board has worked with CSUSA to ensure there are practical guidelines in place in all schools within the FCEF portfolio to protect students, staff, and visitors in the event of an active assailant/shooter on school grounds or in the school building. To minimize the negative impacts from such an event, FCEF has developed Standardized Operating Procedures (SOP) for an active assailant/shooter incident that are implemented in all its schools. To properly prepare schools for a possible active assailant/shooter incident, school staff and students are provided with response options applicable to age and/or disability levels that can be applied based on circumstances that exist at the time of an incident.

In accordance with the FLDOE memo dated August 1, 2019, all CSUSA-managed schools have adopted an Active Shooter Response Plan. CLPS has created the plan in accordance with best practices incorporated within the MSD Commission Report, Department of Homeland Security (DHS), Federal Bureau of Investigation (FBI) and other recognized law enforcement agencies. The Active Shooter Response Plan has been incorporated within every school's EMP as required by SB 7026 Public Safety Act. The plan also includes steps to better prepare faculty and staff for how to implement strategies that account for elementary students. The steps are presented, trained, and implemented in ways that are not fear-based but are developed to provide a better understanding of what needs to be done by students if they encounter such a situation.

For younger students, the National Center for Youth Issues, together with U.S. Department of Education and DHS, recommend guidelines that reflect universal standards yet recognize local conditions. These are not "one size fits all," but have objective applicability. As such, the Active Shooter Response Plan includes age-appropriate actions commensurate with school aged students. Prior to the start of each school year, all SCPA staff and faculty are required to complete several training modules that have been accredited and approved by CLPS. Among these is the Active Shooter Training module that incorporates best practices and is online. The Active Shooter Response Plan and training module includes the following measures:

Preparedness

Preparedness activities take place before an emergency occurs, including planning, training, drilling, and evaluating in an effort to prepare the school for an emergency, such as an active assailant/shooter.

- Control access points into buildings (i.e., CCTV, remote buzz-in, visitor screening).
- Classroom doors remain locked during the school day when classes are in session.
- Develop clear, concise, and easy-to-follow emergency procedures.
- Enhance safety by identifying (and marking) hard corners inside classrooms.
- Assure the school has multiple and reliable ways to communicate during emergencies.
- Practice active assailant/shooter procedures by performing drills and training.
- Coordinate drills and training with local police and emergency responders.

Recommended Procedures

If an administrator, teacher, or staff member becomes aware of an active assailant/shooter, they should take immediate steps to safeguard themselves. Once at a safe location, they should initiate a Code Red using all available means of communication. The TAP App system should be activated as soon as possible.

School staff should look for the most viable way to create time, distance, and shielding between themselves (including nearby students) and the threat.

The school's EMP will have pre-designated evacuation staging areas (on and off campus) where students and staff can go during an active assailant/shooter incident. If at a location where escaping is not a safe option, other protocols will be followed.

Procedures Once Law Enforcement Arrives

During an active assailant/shooter incident, police resources will be dispatched to the school. Responding officers rapidly enter buildings and search for the threat, with the primary mission of neutralizing the active assailant(s).

Age-Appropriate Responses

These procedures will be presented, trained, and implemented in ways that are not fear-based, but rather developed to provide a better understanding of what needs to be done by staff and students if the school experiences an active assailant/shooter incident.

Evacuation & Reunification

In the event of an Active Shooter incident, SCPA will follow evacuation and reunification procedures created within the Emergency Management Plan. SCPA will have a clearly defined and detailed Reunification Plan operating within nationally recognized standards of the Standard Reunification Method (SRM) and I Luv U Guys Foundation and U.S. Department of Homeland Security. SCPA will also ensure adoption of policies and procedures of the Florida Department of Education's Model Reunification Plan released in August 2023 and created with CLPS consultation on DOE's Reunification Working Group. Copies of SCPA's Reunification Plan will be distributed to law enforcement and first responders and uploaded to the Assets Section of the FSSAT.

C. Explain how the school will establish a threat assessment team as required by section 1006.07(7), F.S.

CLPS will also provide online resources to train staff in responding to a wide variety of threats which will allow establishment of a threat assessment team as required in § 1006.07(7), F.S. The 2019 Senate Bill 7030 requires the FLDOE's Office of Safe Schools to "...develop a standardized, statewide behavioral threat assessment instrument for use by all public schools, including charter schools, which addresses early identification, evaluation, early intervention, and student support." The required behavioral threat assessment instrument is the Comprehensive School Threat Assessment Guidelines (CSTAG). CLPS will provide threat assessment training modules both in person and online that mirror the CSTAG model and "decision tree" employed by the assessment. Faculty members and administrators at [SCHOOL] will be provided comprehensive training by CLPS on how to conduct a threat assessment, associated interviews and coordinate with law enforcement as required by statute. The threat assessment training and software have been demonstrated to the FLDOE Office of Safe Schools, ensuring the statutory guidelines are met.

Members of the threat assessment team will be required to complete the digital threat assessment team training course by August 30th of each year. Newly hired employees assigned to the team are required to complete the digital threat assessment team training course within 15 days of being hired. SCPA principal (or designee) will manage the threat assessment team and all policies and procedures related to threat assessment, which includes ensuring that members of the team complete the required training in accordance with established policies and procedures. In order to allow the threat assessment team to

operate as efficiently as possible, the Threat Assessment Solution will be implemented, which is a multiplatform threat assessment and management system designed to assist the threat assessment team when investigating a student of concern.

When a student or staff member becomes aware of implied or direct threats of violence by other students, he/she must report the threat immediately to the principal, assistant principal, or SSC. The principal (or designee) will determine if it is necessary to convene the threat assessment team in order to make further inquiries about the threat. SCPA will adopt a threat assessment process that will systematically investigate student-made threats to determine apparent risk level of the student of concern. Threat assessment investigations will be non-biased and conducted using standardized questionnaires. The purpose of a threat assessment investigation is to determine if a student poses a real danger to the school community or themselves after gathering information from multiple sources.

If the threat assessment team is activated and performs a threat assessment investigation, the principal (or designee) will notify the CSUSA Florida Superintendent (or designee) to inform them that a threat case was started for a student of concern. At the conclusion of a threat assessment case, the principal will consult with the CSUSA Florida Superintendent (or designee) to discuss the appropriate post-assessment management of the student of concern. Disciplinary action, if any, will be in accordance with school policy. The principal and the threat assessment team will use the threat assessment software tool when conducting threat assessments. Reports of potentially violent incidents will be shared with local law enforcement as soon as possible. The following process may be used to create the threat assessment team and establish roles and responsibilities:

- The principal will identify members of a threat assessment team that includes persons with expertise in counseling, instruction, school administration, and law enforcement in accordance with § 1006.07(7)(a), F.S. Members will be trained on the roles and responsibilities of each team member.
 - Guardians, private security guards with guardian training, or other campus security staff will not serve in place of sworn law enforcement on threat assessment teams.
 - If there is not an SRO or other sworn law enforcement officer assigned to the school, the governing board will work with local law enforcement entities to ensure the required law enforcement presence on the team. Having an active, sworn law enforcement officer on the threat assessment team is essential as officers have unique access to law enforcement databases and resources that inform the threat assessment process.
- All administrators and threat assessment team members will attend and complete mandatory threat assessment trainings annually as well as such training mandated by CLPS. Each mandatory team member will report their completion of this requirement to their principal or designee.
 - The team will provide annual training and guidance to students, staff, and parents on recognizing behaviors of concern, their roles and responsibilities in reporting the behavior, and the various options for submitting a report, including anonymous reporting.
- The principal will assign school-based staff members who can proactively monitor and respond to all incoming reports where safety is of concern.
- The threat assessment team will respond, within 24 hours when school is in session, to any report of a threat or any patterns of behavior that may pose a threat to self or others. If school is not in session, the principal will immediately refer the matter to law enforcement for evaluation, and the threat assessment team will meet no later than the end of the first day school is back in session to consider the matter and ensure it is resolved.

- When assessing a potential threat or concerning behavior, the threat assessment team must determine not only whether a threat has been made or communicated, but also if a person poses a danger to self or others or if they are potentially on a pathway to violence.
- The threat assessment team will follow established procedures for referrals to school-based, community, and/or health care providers for mental health services, evaluation, or treatment.
- All threat assessment outcomes and recommendations will be reported to the principal. The principal will review the documentation for all threat assessments to ensure completeness and fidelity. The principal will sign/acknowledge that the threat assessment documentation is complete and will forward the signed/acknowledged assessment to the CSUSA Florida Superintendent. In addition, upon a preliminary determination that a student poses a threat of violence or physical harm to self or others, the threat assessment team will immediately report its determination to the principal or designee. The principal or designee will immediately attempt to notify the student's parent or legal guardian.
- If an immediate mental health or substance abuse crisis is suspected, school personnel will follow policies to engage behavioral health crisis resources, including, but not limited to, mobile crisis teams and school resource officers, who have been trained in crisis intervention. These individuals shall provide emergency intervention and assessment, make recommendations, and refer the student for appropriate services.
- School employees, volunteers, and contractors are required to report to school administration any expressed threat(s) or behavior(s) that may present a threat to the community, school, or self.
- Regardless of threat assessment activities, disciplinary action and referral to law enforcement will occur as required by law and governing board policies.
- Upon a preliminary determination by the threat assessment team that an individual poses a threat, members of the threat assessment team may request and obtain criminal history record information.
- Threat assessment records are considered educational records and will be maintained and released in accordance with FERPA and state statute. The threat assessment, its determination, along with any interventions provided, will be recorded in the appropriate electronic data systems by the threat assessment team.
- The threat assessment team will meet regularly to discuss new and ongoing cases. All meetings will be documented within the CLPS Emergency Management Plan-Drills and Safety Meetings section.
- Threat assessment teams will identify all means of reporting threats, including FortifyFL (the statewide mobile suspicious activity reporting tool) and any similar reporting tools required by state law. Local hotlines, websites, or other community-based resources will also be identified.
- Threat assessment records will be transferred within three school days when a student transfers school, pursuant to § 1003.25, F.S. and Rule 6A-1.0955, F.A.C.
- The threat assessment team will use their judgment in completing the CSTAG in accordance with district policies and the corresponding level of the threat.
- If a threat meets the definition requirements approved by the State Board of Education (Rule 6A-1.0017) for the School Environment Safety Incident Reporting (SESIR), a SESIR report will also be submitted through the state portal.
- HB543 requiring both the new instrument and new process was signed into law by the Governor on April 23, 2023. The implementation date for the new Florida threat management process will be January 1, 2024.

- CLPS will provide a certified instructor who served on the MSD Committee responsible for creating the new Florida Harm Prevention and Threat Management model (HPTM) that will train all SCPA personnel and certify their ability to serve on the School Based Threat Management Team.
- SCPA will ensure compliance with all threat management policies and procedures pursuant to Rule 6A-1.0019 that took effect July 1, 2023.

D. Explain how the school will accurately and timely report incidents related to school safety and discipline as required by section 1006.07(9), F.S.

To ensure the safety and security of students and staff, each family will receive an electronic copy of the student code of conduct, which will clearly outline the behavior expectations of the students. Students who become violent or disruptive will, when safety permits, be removed from other students. If safety does not permit the removal of the student, staff will immediately remove the other students from the area and relocate them to a safe area. The student's parents/guardians will be immediately notified, and when possible, the student will be counseled by staff. If a student becomes violent, law enforcement will be notified immediately, and appropriate disciplinary action will be taken. All incidents related to school safety and discipline, and all disciplinary action required to be reported, will be immediately reported in the SESIR system in a timely manner consistent with § 1006.07(9), F.S. This includes any potential threats made towards the school, its staff, or students. This process enables the FLDOE to monitor student incidents as those students move from school to school. Three staff members will be trained in SESIR reporting via Florida's online training program. Two of these individuals will serve as primary SESIR reports throughout the year, and one will serve as a backup.

State law mandates at least one individual at a school is SESIR certified and trained. CSUSA requires at least two persons at each school are so designated, a primary and alternate. The principal will ensure at least two staff members are SESIR trained and responsible for reporting required incidents as required by statute.

Section 20: Budget

A. Provide as Attachment X, an operating budget covering each year of the requested charter term that contains revenue projections (using the Florida charter school revenue estimate worksheet as Attachment W for at least the first year of operation), expenses, and anticipated fund balances. The budget should be based on the projected student enrollment indicated in Section 2 of the application. A template for the operating budget may be available from the sponsor upon request.

The operating budget has been provided as **Attachment X**, and the Florida charter school revenue estimate worksheet has been provided as **Attachment W**.

B. Provide a start-up budget as Attachment Y 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.

The startup budget has been provided as **Attachment Y**.

C. If the budget is contingent upon sources of funding beyond those typically provided by local, state, and federal governments (such as funding from foundations, donors, grants), provide evidence of such funding (e.g. MOU, letters) as Attachment Z.

The budget is not contingent upon sources beyond typical funding.

D. Provide a detailed narrative description of the line-item 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.

Revenue Assumptions

- Average FTE funding is assumed at \$8,656 in Year 1. This is from the latest funding worksheet provided by FLDOE. Please note this figure represents the per-pupil average of total district funding in Year 1.
- In Years 2-5, inflation of 2% is assumed for revenue and expense.
- Capital outlay is assumed at an average rate of \$975 per student in Year 1 and adjusted for inflation and enrollment increases in subsequent years.
- For the first year, SCPA will seek 5-year financing at prevailing interest rates.
- The amount financed is projected as \$1.6M in Year 1. The financing will be used to cover computer hardware and IT infrastructure and FF&E.

Food service revenue consists of a combination of full-paid lunches and reimbursement from the NSLP. **Table 20.1** shows the projected revenue based on CSUSA’s historical data from schools with similar populations.

Table 20.1

Year 1	Year 2	Year 3	Year 4	Year 5
\$283,567	\$331,725	\$380,029	\$413,132	\$428,331

Expense Assumptions

- In Years 2-5, inflation of 2% is assumed for revenue and expense.
- Average teacher wage is assumed at \$54,637.
 - Per the 5-Year Income Statement Forecast included in **Attachment X**, the Total Payroll Taxes line item of \$274,000 represents the sum of FICA, Medicare and state and federal unemployment taxes.
 - Performance-based bonus is included in the budget based upon 0.22% of state funding in applicable years as shown in **Table 20.2**.

Table 20.2

Year 1	Year 2	Year 3	Year 4	Year 5
-	\$19,915	\$22,815	\$24,802	\$25,715

- CSUSA's total Support Center cost reimbursement expenses are calculated as a percentage of revenue beginning in Year 2 at 3.0%.
- **Table 20.4** assumes transportation at 5% participation. Transportation cost is assumed at \$72,000 in Year 1, with 2% inflation for Year 2 and beyond.

Table 20.4

Year 1	Year 2	Year 3	Year 4	Year 5
\$72,000	\$73,440	\$149,818	\$152,814	\$155,870

E. Discuss the school's contingency approach and plan to meet financial needs if anticipated revenues are not received or are lower than estimated. This may include budgets for 75% and 50% of revenue projections or a budget for whatever percentage the applicant considers the minimum percentage at which they could operate the educational plan presented.

If revenue shortfalls occur due to lower-than-expected enrollment, a revised budget will be created and submitted to the district. Variable expenses will be adjusted to compensate for the revenue shortfall. For example, staff and associated expenses may be reduced as required comparable to the reduced enrollment. Budgets are revised as necessary to achieve balance and align costs with revenue in a manner that is least disruptive to the learning environment. CSUSA will stand behind SCPA to ensure its viability, up to and including reducing its fee for support center services to zero. In addition, **Attachment X** includes contingency budgets that are calculated using 90% and 75% of projected enrollment.

F. Explain in detail the year one cash flow contingency plan, in the event that revenue projections are not met (or not met on time).

Conservative assumptions have been made on the financial budget, especially during the first year, to ensure the financial health of operations. As part of the mitigation process, FCEF and CSUSA will closely monitor enrollment during the first year to spend appropriately on enrollment-based expenses, particularly compensation, which is the biggest expense in the budget. Alternative outcomes will be contemplated before opening the school to safeguard against potential shortfalls. If expectations are not met, SCPA will engage in a mitigation process entailing reduction of controllable expenses while maintaining the necessities for the education of the students. In rare, but possible cases, SCPA can turn to alternate

sources of funding, such as the management company or construction partner, if necessary. As budget variances arise and are managed, new forecasts will be developed each month to ensure SCPA stays on track financially throughout the year. These forecasts will allow school leadership to make timely management decisions to ensure the financial health of the school and will be presented to FCEF on at least a quarterly basis.

G. 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.

The school's start-up budget is included as **Attachment Y**.

Section 21: Financial Management and Oversight

A. Describe who will manage the school's finances and how the school will ensure strong internal controls over financial management and compliance with all financial reporting requirements.

The governing board will contract with CSUSA to provide financial management services to SCPA. FCEF will adopt the established processes and procedures of CSUSA to ensure fiscal responsibility and sound internal controls. FCEF will retain ultimate control of the school's finances. Policies and procedures are in place to ensure internal controls at the school level as well as CSUSA's support center. An accountant will be in charge of performing the monthly close, which will then be reviewed by either a senior accountant, supervisor, or assistant controller. Schedules for accountants will be staggered throughout the month based on district reporting deadlines to ensure timely submissions.

CSUSA will manage the day-to-day accounting and financial reporting function for SCPA. There will be several layers of internal oversight between employees performing finance-related tasks at the school and at CSUSA's support center. CSUSA's Finance Department, many of which are either CPAs or have extensive corporate auditing experience, include the Chief Financial Officer, Vice President of Finance, Controller, Assistant Controller, and Accounting Manager. This sets the tone for the control environment to ensure that financial resources are properly managed.

SCPA will employ a SOA who will act as a liaison to CSUSA for human resources, payroll, and financial matters relating to cash collection. The SOA will also work with the principal to ensure adherence to the governing board approved annual budget for the school. Below is a summary of the finance and accounting functions that the SOA performs:

- Deposit funds received from food service sales, aftercare programs, and fundraising into proper bank accounts according to governing board-adopted financial policy.
- Submit documentation for all receipts and disbursements made at the school level.
- Follow up and collect returned checks from parents.
- Prepare and submit instructional related purchase orders according to governing board-adopted financial policy.
- Prepare and submit check requests for certain invoices.
- Review and approve expenditure invoices with the principal.
- Maintain reconciliation of internal funds account.
- Provide support for grant reimbursement.

Financial management services include:

- Processing of accounts payable.
- Preparation of the monthly and quarterly financial statements.
- Preparation, maintenance, and forecasting of the budget.
- Financial reporting, including explanation of variances, to internal and external parties.
- Audit management.

The financial management team includes:

- Accounts Payable Coordinator: Pays the school's approved expenditures.
- Accountant: Prepares the school's monthly financial statements for internal review and quarterly financial statements.

- Accounting Supervisors (one of which is a CPA): Oversees the work of the staff and senior accountants.
- Assistant Controllers (one of which is a CPA): Oversees the work of the accounting supervisor and senior/ staff accountants.
- Controller: CPA; Oversees the accounting team.
- Vice President of Accounting & Financial Planning and Analysis: Oversees the financial planning and analysis team and accounting team.
- Financial Analyst: Prepares the school's annual budgets. reviews the school's financial performance on a monthly and quarterly basis, focusing on budget variances; conducts dashboard reviews with the school's leadership at least quarterly.
- Senior Financial Analyst: Oversees the work of the financial analyst; prepares the school's annual budgets and reviews the financial performance of the school on a monthly and quarterly basis, focusing on budget variances; conducts dashboard reviews with the school's leadership at least quarterly; presents financial statements to the governing board on a quarterly basis.
- State Financial Director: Oversees the work of the financial analyst and senior financial analyst; presents financial statements to the governing board on a quarterly basis.
- Senior Director of Financial Planning: Oversees the financial planning and analysis team.

B. Explain the mechanisms the governing board will use to monitor the school's financial health and compliance.

CSUSA maintains internal control policies which will be adopted by FCEF via the management agreement. These internal controls include general governmental accounting policies, financial reporting, budgeting, cash receipts and deposits, purchasing and cash disbursements, capital assets, and payroll. Internal controls are viewed as a means to reduce risk of asset loss and ensure reliability of financial statements as well as compliance with laws and regulations. There are several components to internal control, including control environment, risk assessment, control activities information and communication, and monitoring. These components are used to establish the internal control policies and procedures.

FCEF will approve the school's budget on an annual basis and conduct budget management throughout the year using a three-part process: (1) review and approval of financial statements, (2) review of budget vs. actual variances, (3) forecasting of future results, including budget amendments as required. The first part of the process is the preparation of the school's monthly financial statements. Financial statements will be prepared by CSUSA and distributed electronically to school leadership, FCEF, and the school district based on the required schedule (monthly or quarterly). Monthly financial statements are prepared using Generally Accepted Accounting Principles specific to governmental entities. SCPA will also follow the guidelines in the "Financial and Program Cost Accounting and Reporting for Florida Schools" (Red Book). Monthly financial statements include a comparison of actual results to the approved budget, which facilitates budget review, the second part of the process. Through forecasting, the third part of the process, FCEF will be able to make timely decisions to ensure the financial health of the school.

In addition to the process described above, SCPA will be provided with dashboard reports at least quarterly from CSUSA. The dashboard report summarizes the monthly activity of the school, compares the results to the budget, and identifies significant budget variances. As budget variances arise and are managed, new forecasts are developed each month to ensure SCPA stays on track financially throughout the year.

C. Describe the school's plans and procedures for conducting an annual audit of the

financial operations of the school.

In compliance with § 1002.33(9), F.S., SCPA will obtain an annual financial audit performed by an independent certified public accounting firm. The governing board may appoint an audit committee to oversee the audit of the school. The governing board will use the auditor selection procedures as outlined in § 218.391, F.S. if an audit committee is utilized. The audit will be performed in accordance with Generally Accepted Auditing Standards; Government Auditing Standards, issued by the Comptroller General of the United States; and Chapter 10.850, Rules of the Auditor General, State of Florida. Audited statements will be submitted to sponsor in accordance with the terms defined in the charter contract.

Auditors will provide an engagement letter each school year that is presented to the governing board. Once approved by the governing board, the accounting department will arrange the timing of the audit after the close of the fiscal year. The team will provide the auditors with all requested items while they are on site and will request any additional school information from school administration.

D. Describe the method by which accounting records will be maintained.

All accounting records will be stored in Docuware, a paperless storage system. All files are maintained in a secured environment. Information system backups are completed daily to ensure data is secured and minimize risk of loss. CSUSA currently uses Oracle NetSuites, an efficient system that is better tailored towards the specific accounting needs of education operators. The accounting information system used for financial management is subject to change as needed.

E. Describe how the school will ensure financial transparency to the authorizer and the public, including its plans for public adoption of its budget and public dissemination of its annual audit and financial report.

CSUSA will provide FCEF with:

- The projected annual budget for governing board approval.
- Detailed statements of all revenues received, and detailed statements of all expenditures for services and expenses rendered or incurred to or on behalf of SCPA (includes expenses incurred on-site or offsite).
- Monthly financial statements including a balance sheet, statement of revenues, and expenditures.
- Other information on a periodic basis to enable FCEF to furnish reports and information which the school is required to provide pursuant to its charter contract and/or applicable laws (this information is also used to monitor CSUSA's performance and the efficiency of its operation of SCPA).

CSUSA and FCEF will keep accurate financial records pertaining to the operation of the school together with all financial records prepared by or in possession of CSUSA. All records will be retained for a period of time as required by the charter contract and/or applicable laws. The proper confidentiality of personnel, students, and other records as required by law will be maintained.

F. Describe any key back-office services to be outsourced via contract, such as business services, payroll, and auditing services. Include the anticipated costs of such services and criteria for selecting such services.

Financial audits will be outsourced, as they are conducted annually by an independent, certified public

accountant. FCEF will determine the auditing firm. FCEF may also appoint an audit committee to oversee the audit.

G. Describe how the school will store financial records.

Financial records will be stored electronically in Docuware.

H. Describe the insurance coverage the school will obtain, including applicable health, workers compensation, general liability, property insurance, and directors' and officers' liability coverage.

Employees will be offered health insurance benefits with various levels of coverage and premiums to meet their needs, including medical, dental, vision, life, disability, a 401(k) plan, and other miscellaneous benefits such as supplementary health insurance, flexible spending accounts, and identity theft insurance. Eligible employees (those working a minimum average of 30 hours/week) will be able to participate in the benefits plan on the first day of the month following their 60th day of employment. Once elected, changes cannot be made to employee benefits mid-year without a qualifying event (e.g., birth of child, marriage, divorce, or gain/loss of other coverage).

Table 21.1 outlines the liability insurance SCPA will maintain.

Table 21.1

Commercial Property Insurance	Based on Value of Property	
Commercial General Liability	Each Occurrence	\$1,000,000
	Aggregate	\$3,000,000
Commercial Automobile Liability	Each Accident (combined single Limit)	\$1,000,000
Educators Professional Liability	Each Claim	\$1,000,000
	Aggregate	\$2,000,000
Directors & Officers Liability*	Aggregate Limit for Loss	\$1,000,000
	Additional Aggregate for all Loss	\$2,000,000
Employment Practices Liability*	Aggregate Limit for Loss	\$1,000,000
	Additional Aggregate for all Costs, Charges, and Expenses	\$2,000,000
Fiduciary	Coverage included under Charter Schools USA, Inc. policy as they are the administrator of plans	NA
Fidelity (Crime)	Single Loss	\$1,000,000
Workers' Compensation and Employer Liability	Workers' Compensation	Statutory Limits
	Bodily Injury by Accident - Each Accident	\$1,000,000
	Bodily Injury by Disease – Each Employee	\$1,000,000
	Bodily Injury by Disease - Policy Limit	\$1,000,000
Student Accident	Basic Each Occurrence (out of pocket expense)	\$25,000
	Catastrophic	\$5,000,000
Sexual Abuse and Molestation	Each Occurrence	\$1,000,000
Cyber	Each Occurrence	\$1,000,000

*Shared limit between Directors & Officers Liability and Employment Practices Liability

Section 22: Start-Up Plan

A. Present a projected timetable for the school's start-up, including but not limited to the following key activities:

- i. Applying for and securing appropriate legal status (e.g. status as a state corporation, federal non-profit)
- ii. Identifying and securing facility
- iii. Recruiting and hiring staff (leaders, teachers, and other staff)
- iv. Staff training
- v. Finalizing curriculum and other instructional materials
- vi. Governing board training
- vii. Policy adoption by Board (if necessary)
- viii. Recruiting students
- ix. Enrollment lottery, if necessary
- x. Establishing financial procedures
- xi. Securing contracted services
- xii. Fundraising, if applicable
- xiii. Finalizing transportation and food service plans
- xiv. Procuring furniture, fixtures and equipment
- xv. Procuring instructional materials

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. A formal timeline may be negotiated in the charter agreement)

The facility construction project will be managed by CSUSA. CSUSA has developed charter schools in a variety of settings, including urban, suburban, rural, and commercial centers. A project-management team develops the school-opening milestones and benchmarks and oversees their implementation. All project-related schedules are tracked and accessible online to ensure the most up-to-date information is always available. The project-management team will drive the project to successful completion by leading weekly project reviews, benchmark/milestone tracking, contractor relations, and budget management.

The overall planning costs for SCPA will be incorporated into and paid for as a component of CSUSA's overall school development plan. The start-up costs of planning and development of SCPA will be recovered by CSUSA through the fee for support center services collected in future years. A model project timeline for the school's opening will include but will not be limited to the milestones/benchmarks outlined in **Table 22.1** below. Detailed project plans will be built for each phase of the project. CSUSA has developed a proprietary, comprehensive checklist detailing over 1,000 items that will be completed to ensure a successful and safe school opening.

To ensure SCPA is ready to open for its first year in operation, CSUSA's Successful Opening of Schools Team (SOS Team) will oversee the start-up process. The SOS Team consists of representatives from each functional area within the company, CSUSA Florida leadership, as well as the school's principal once hired. During the school-opening process, these team members are focused on ensuring all tasks that are required to open a brand-new school within their functional area are completed on time and correctly. A

project manager who is responsible for planning, implementing, and directing the operational procedures of all new schools leads the team.

The project manager:

- Facilitates weekly or bi-weekly (depending on time of year) meetings to identify issues, develop recommendations, and ensure oversight of project status.
- Implements systems for quality assurance, support, oversight, and accountability.
- Develops full-scale project plans.
- Tracks project deliverables using appropriate tools.
- Consistently monitors and reports the progress of the projects to department heads and CSUSA's executive team.

Meetings are attended by SOS Team members and the school principal, SOA, and others once hired. Meetings are tailored to the corresponding timeline in the project plan. Each team member is responsible for providing updates/information regarding their respective tasks and alerting the team of any potential issues. Any deficiencies or delays noticed by the project manager are also addressed in these meetings.

The SOS Team process commences as soon as projects are given a green light, runs through October of the year prior to the school's opening year, and ends with an after-action review the following October. Suggestions and/or project revisions from the after-action review are added to the SOS Team project plan template and implemented the following school year.

Table 22.1

Period	Projected Timetable for Key Project Tasks	
3/25-5/25	<ul style="list-style-type: none"> • Apply for General Building Permit • Land Development • Facility Construction • Open Enrollment Period • Enrollment – Finalize Budgets/Forecasts • General Community Awareness / Information Marketing 	<ul style="list-style-type: none"> • Technology Planning • Identify Potential Leadership Candidates • Lottery, if Necessary • Hire School Leadership (principal hired up to 6 months prior to school opening) • Establish/Adopt Financial Procedures • Policy Adoption by Governing Board
5/25-8/25	<ul style="list-style-type: none"> • Finalize Curriculum and Other Instructional Materials • RFPs for Vendors • Services, FF&E, Technology, Instructional Materials • Contracted Special Education Services • Community Activities • Facility Lease Executed • Construction (Ongoing) 	<ul style="list-style-type: none"> • Faculty Recruiting and Hiring • Faculty and Staff Training • Direct Marketing for Student Enrollment • Student Enrollment/Registration (Ongoing) • Complete Construction • Finalize Transportation and Food Service Plans • School Leadership PD
6/25-8/25	<ul style="list-style-type: none"> • Certificate of Occupancy • Governing Board Training • Installation of FF&E • Technology Installation • Staff Move-in • Teacher PD (NTI/RTO) 	<ul style="list-style-type: none"> • "Open House" Sessions for Parents/Students • Student Enrollment/Registration (Ongoing) • First Day of School • Direct Marketing for Student Enrollment

Addendum A: REPLICATIONS

A. Identify the existing school(s), including MSID number(s), to be replicated and provide evidence that the existing design has been effective in raising student achievement. The effectiveness of an existing school design should include evidence of the success of the academic program as well as organizational and financial viability. It should show a direct relationship between program elements and student achievement.

FCEF has chosen to partner with CSUSA as the ESP for SCPA due to CSUSA's proven performance and success in operating FCEF's current schools in Florida. FCEF will be replicating the CSUSA Education Model employed in all CSUSA schools, including all schools governed by FCEF (Clay Charter Academy, Creekside Charter Academy, Henderson Hammock Charter School, Innovation Preparatory Academy, Keys Gate Charter School, SouthShore Charter Academy, Union Park Charter Academy, Waterset Charter School, Winthrop Charter School, Winthrop College Prep Academy, Woodmont Charter School, and College Preparatory Academy at Wellen Park). MSID numbers and other information regarding all of these schools can be found in Form IEPC-M1A, which has been included as **Attachment DD**.

The CSUSA network of managed schools, as of the 2022-2023 school year, includes 83 schools and over 75,000 students across 5 states. Sixty-four of these schools are in the state of Florida. Across the schools in Florida, 59% of students are considered economically disadvantaged and 77% of students are classified as minority populations. Of CSUSA's 64 schools in Florida, 12 are governed by FCEF for the 2023-24 school year. FCEF and CSUSA's network of schools serve a broad spectrum of student demographics, from schools with both low FRL and low minority rates to schools that serve both high FRL and minority communities. However, the average CSUSA and FCEF (50% ED, 73% minority) school has a significantly higher minority and economically disadvantaged student population than Sarasota County schools (ED 52%, Minority 39%).

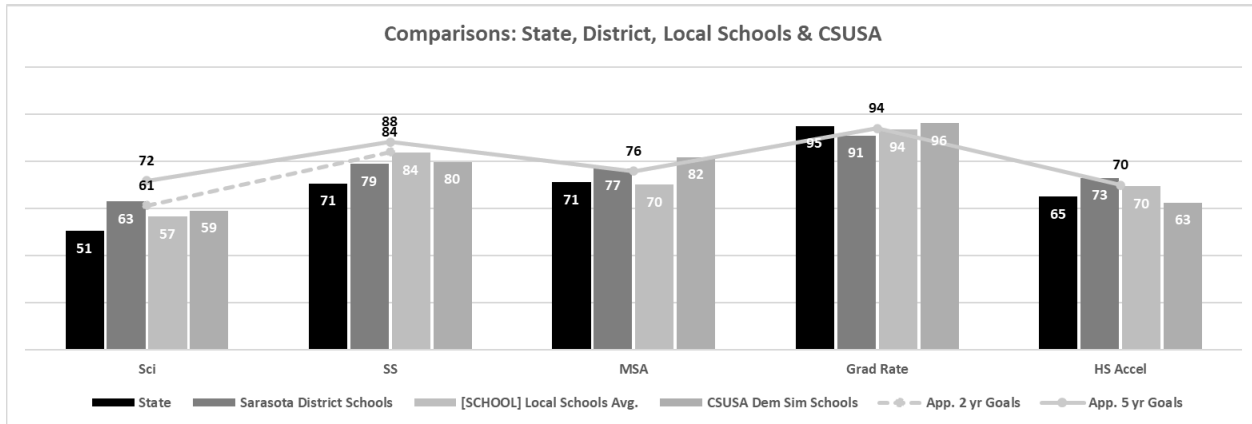
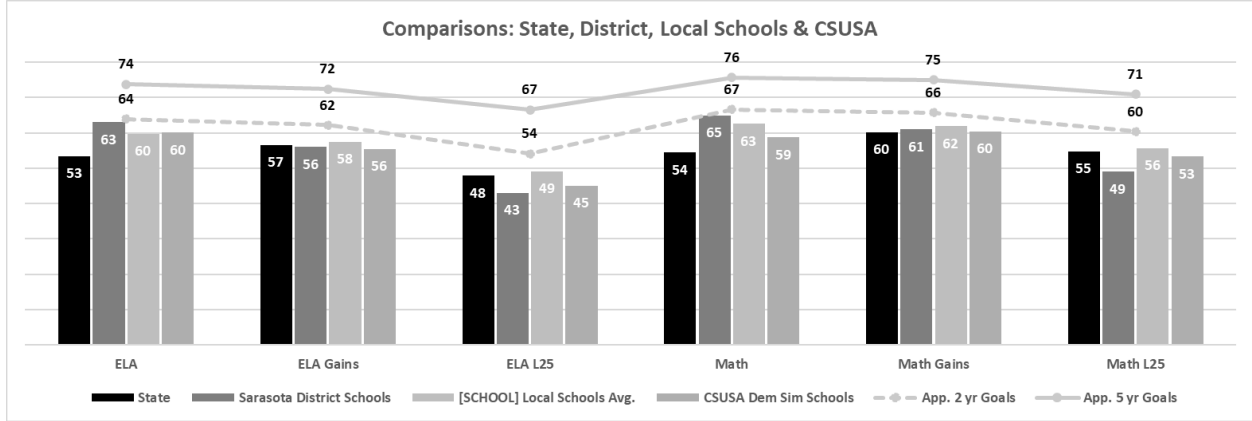
Graphs B.1 and B.2 below show Florida School Grade results (2022) for demographically similar CSUSA schools² and CSUSA Schools categorized by tenure compared to that of the state, Sarasota County Schools, and the local school average. SCPA's 2nd and 5th year goals detailed in the example above are also provided for comparison. Overall, the data shows improvement trends the longer schools and students are part of the CSUSA network and anticipated performance that meets/exceeds local schools:

- CSUSA's demographically similar schools' (to SCPA's anticipated student population and that of the previously identified schools) performance meets or exceeds the state of Florida, Sarasota County Schools or the local schools in every school grade component with the exception of High School Acceleration.
- Science, Middle School Acceleration and Graduation Rate all exceed the local school average among CSUSA's demographically similar schools.

² Demographically Similar CSUSA schools were included when they were +/- 5% points on either Minority Rate or the percentage of Economically Disadvantaged students. There was only one school that met both criteria. The average minority rate among CSUSA schools with an Economically Disadvantaged population of (+/- 5) 52% is over 74%. Conversely, the average Economically Disadvantaged population of CSUSA schools with (+/- 5) 49% minority is only 33%. CSUSA Schools included: Aventura City Of Excellence School, Collier Charter Academy, Coral Springs Charter School, Don Soffer Aventura High School, Duval Charter At Baymeadows, Duval Charter High School At Baymeadows, Duval Charter School At Coastal, Duval Charter School At Mandarin, Gateway Charter Elementary School, Gateway Charter High School, Gateway Charter Intermediate School, G-Star School Of The Arts, Hollywood Academy Of Arts And Science Middle School, Innovation Preparatory Academy, Renaissance Charter School At Hunters Creek, Renaissance Charter School Of St. Lucie, Renaissance Middle Charter School, Union Park Charter Academy, and Waterset Charter School.

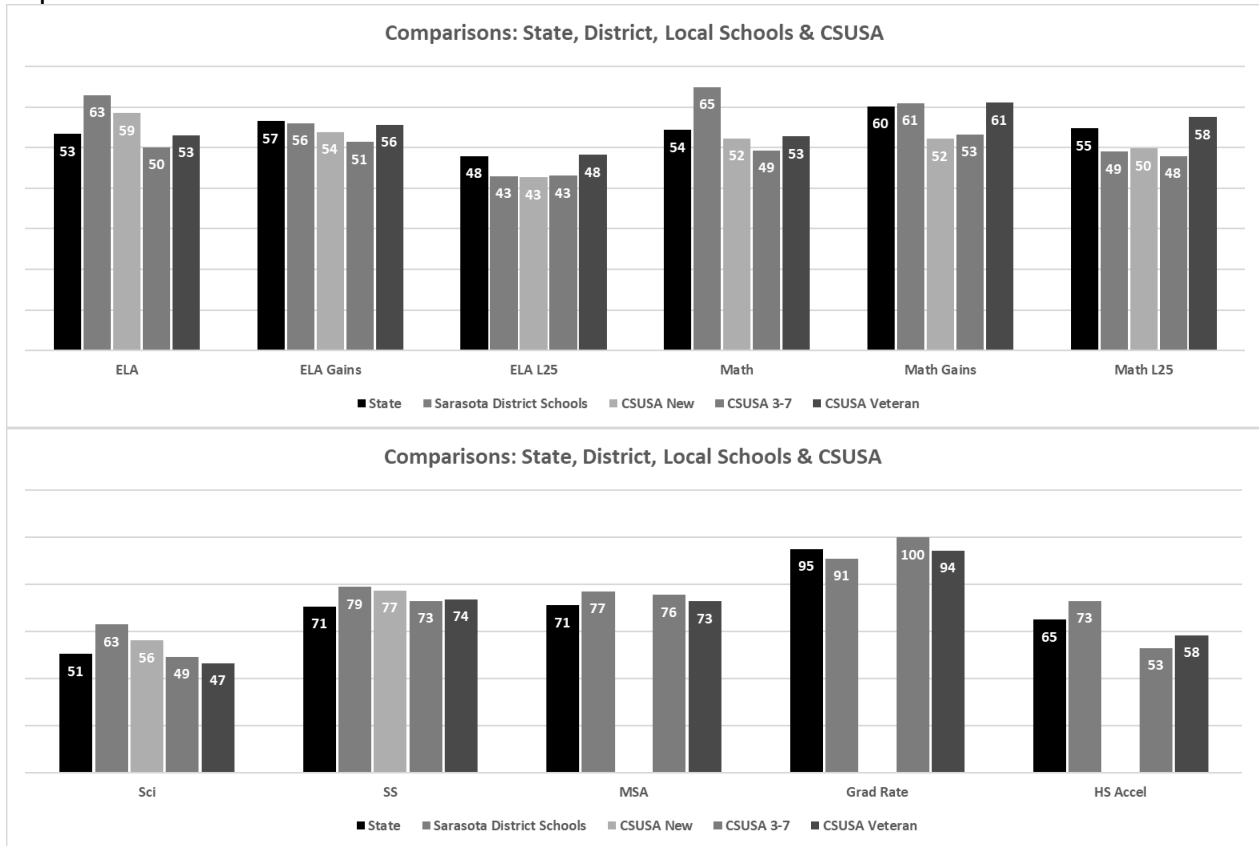
- Veteran (open since at least 2015) CSUSA-managed schools met/exceeded Sarasota Schools performance on all math and ELA learning gains components as well as met the state average in ELA and Social Studies proficiency.

Graph B.1 Core Subject-Area Performance



Middle School Acceleration would not factor into the school grade until year 3 of the charter term—the year 5 goals shown above is only 2 years after the baseline performance of local schools (70%). Year 5 of the Charter Term would be the first year Graduation Rate and High School Acceleration would factor into the school grade. They are shown above at the baseline value calculated from local schools.

Graph B.2 ESP Performance Relative to Charter Tenure



New schools, because of the grade level ramp up would not have Middle School Acceleration, Graduation Rates or High School Acceleration in their first two years.

Please see Form IEPC-M1A in **Addendum DD** for CSUSA's network of schools' grades and FRL percentages.

B. Discuss the key components or non-negotiable elements of the educational program that make the school design what it is and that the operator will expect to remain consistent and essential to the successful replication of the model.

The CSUSA Education Model outlines key elements of a continuous improvement process that must be followed by all instructional staff with fidelity. Components are outlined in **Section 3**. Teachers have the ability to determine the best methods of instruction via various instructional strategies and teaching methods, but the core components of the Education Model and continuous improvement process, integrated with the classical framework, must be followed with fidelity to ensure that SCPA's mission.

C. Describe how the target population for the proposed school compares with the population(s) currently being served. Explain why the model will be effective and successful in raising student achievement with the applicant's target population.

FCEF and CSUSA's network of schools serve a broad spectrum of student demographics, from schools with both low FRL and low minority rates to schools that serve both high FRL and minority communities. However, the average CSUSA and FCEF (50% ED, 73% minority) school has a significantly higher

minority and economically disadvantaged student population than Sarasota County schools (ED 52%, Minority 39%). The Education Model's continuous improvement cycle will allow SCPA to tailor programming to meet individual student needs.

D. To the extent that the target population for the proposed school differs from the populations being served in existing schools, explain any anticipated modifications and adjustments to the educational program.

The diversity of FCEF and CSUSA's network of schools and their success with all student populations illustrates that regardless of student demographics, the CSUSA Education Model works. Since CSUSA's Education Model with embedded continuous improvement process are designed to allow the teacher to tailor instruction towards the needs of each individual student, it is not expected that the CSUSA Education Model and embedded continuous improvement process will need to be adjusted.

E. Describe any other ways in which features of the proposed school's educational program will differ from that of the school(s) to be replicated. Explain the rationale for the change(s) and any new resources that the variation(s) will require.

The CSUSA Education Model and embedded continuous improvement process will be enhanced through incorporation of the CSUSA classical framework as detailed in **Section 3**.

F. Discuss the plan for replication, including if the operator will need to acquire and allocate additional financial and human resources necessary to replicate the design successfully. If additional resources are necessary, describe the plan for securing.

In managing the replication and start-up plan, CSUSA's first step will be the mobilization of the New School Opening Team (NSOT). The NSOT is a team of professionals representing each functional area within the company (finance, education, human resources, technology, operations, facilities, marketing, enrollment, development, and governance) who are focused on ensuring all tasks that are required to open a brand new school are completed on time and correctly.

The NSOT takes responsibility for the full range of tasks required to open a new school. This includes recruiting, hiring, and training school staff; marketing; enrollment of students; facility planning, acquisition, and construction; school operations infrastructure (food service, uniforms, FF&E, etc.); establishing financial processes; managing governing board relations; and compliance with authorizer requirements.

As the team is completing the above tasks, CSUSA (with input from the NSOT and FCEF) identifies the additional resources and staffing required in each functional department based on planned growth, and acquires these resources with the expectation to be able to continually support a growing network of schools. Once the pre-opening tasks are complete and the staff is hired, the staff development process begins. CSUSA's staff development process significantly contributes to our ability to expand our model to new sites. CSUSA and FCEF have realigned the hiring timeline so that school leadership positions are hired and on-boarded three months prior to school opening. This enables the school leadership team to participate in the new school opening process. The school leadership team participates in professional development by working with their assigned mentors from other schools and attending functional meetings across the company to learn CSUSA's standard operating procedures and the CSUSA culture. All new teacher hires attend New Teacher Induction for two weeks prior to the opening of a new school.

G. Discuss the results of any past replication efforts, if applicable, and lessons learned – including particular challenges or troubles encountered; how you have addressed them; and how you will avoid or minimize such challenges for the proposed school.

CSUSA and FCEF have successfully replicated the CSUSA Education Model in 12 schools throughout Florida. Experience, by way of growth and replication, has provided many important lessons. Each year after new schools have opened and are in progress, the governing board, Support Center New Schools Operating Team, CSUSA Florida support team members, and school leaders perform an “after action” analysis where strengths and weaknesses are evaluated throughout the most recent new school opening process. Areas for improvement are documented and incorporated into the project plan and Standard Operating Procedures are refined to better support effective operations. Three key lessons CSUSA has learned from past replication efforts are described below.

- **Key Lesson 1: Proactive approach to developing key supportive elements of the Education Model:** CFIT, MSA, and QuEST, as described in **Section 5**, are intended to keep the focus on Education Model implementation. A special emphasis is placed on the continuous improvement process embedded in delivery of the model. The CSUSA Florida Superintendent, Deputy Directors, Curriculum Specialists, and other state support team members consistently provide on-site and virtual support to ensure a proactive approach.
- **Key Lesson 2: Reorganize support team members:** Historically, CSUSA has been a very centralized organization from an operations and implementation standpoint. However, growth has shown the importance of having resources both in the field and at the corporate headquarters. The recent reorganization at the corporate level includes enhanced state and regional support across the education, business operations, development, and human resource verticals.
- **Key Lesson 3: Hire leadership teams earlier** – This includes hiring the principal, assistant principal, deans, curriculum specialists and resource teachers, school operations administrators, and enrollment managers earlier so that they can participate and fully engage in the new school opening process. This challenge has been addressed by accelerating the hiring timelines to achieve the goal of earlier onboarding and staffing talent acquisition and human resources employees at the state and regional levels. In addition to hiring earlier, the implementation of a talent pipeline provides a system for identifying the most capable school leaders. This allows CSUSA's Department of Talent Acquisition and Development, who oversee employee recruitment, professional development, compensation, and employee relations, to ensure the hiring of quality leaders and educators. The department operates in conjunction with the state and regional teams and is responsible for both talent acquisition and development.

Addendum B: EDUCATION SERVICE PROVIDERS

An Education Service Provider (ESP) is an organization, either for-profit or nonprofit, that contracts with a charter school or a network of charter schools to provide comprehensive educational and business services. In addition to Addendum B, applicants must also complete Form IEPC-M1A if the governing board plans to contract with an ESP. The following section allows the applicant to demonstrate the ESP's track record of success and its ability to provide services for a new school(s).

ESP Selection

A. Explain why the applicant is seeking to contract with an ESP rather than operate the school(s) directly.

FCEF board members are experienced in the educational, financial, and operational components required to sustain a charter school. However, governing board members decided that collectively there was not enough manpower or resources to market and operate a school the size of SCPA independently. CSUSA's knowledge and proven experience in managing day-to-day charter school operations complements the governing board's expertise and will help deliver the best possible educational experience to students and their families. FCEF has chosen to partner with CSUSA as the ESP for SCPA due to CSUSA's proven performance and success in operating the governing board's current schools in Florida.

B. Explain how and why the ESP was selected. If this is the first time the applicant has contracted with this ESP, explain when and how the applicant learned of the ESP, what other ESPs were considered, and why the ESP was selected over other ESPs.

FCEF initially selected CSUSA due to their experience, success, capacity, Cognia accreditation, and Education Model, all of which aligns well with the governing board's mission to set high expectations, provide oversight, and advocate for a network of safe, academically high-performing, and financially sound K-12 charters schools – empowering parents with school choice.

CSUSA is one of the largest school management companies in the United States. In addition, their ability to deliver a fully equipped, state-of-the-art facility by carrying the start-up costs and underwriting SCPA as necessary was a key factor in the governing board's decision, and it is why FCEF feels that CSUSA will be the best educational, financial, and operational management team for SCPA.

CSUSA has exceeded expectations in service delivery and is driven by a performance-based management agreement. FCEF works closely with legal counsel, the Law Offices of Levi Williams, P.A. (who is independent from CSUSA's legal counsel – Tripp Scott, P.A.), to review and negotiate the terms of the management agreement prior to execution. FCEF will provide oversight of CSUSA on compliance requirements through routine monitoring of the school's operations.

CSUSA maintains Cognia accreditation through North Central Association Commission on Accreditation and the School Improvement (NCA CASI), the Northwest Accreditation Commission (NWAC), and the Southern Association of Colleges and Schools Commission on Accreditation and School Improvement (SACS CASI). Cognia is a non-profit organization that conducts rigorous, on-site external reviews of Pre-K-12 schools and school systems to ensure that all learners realize their full potential. The Cognia accreditation protocol is rooted in a deep commitment to continuous improvement. As such, they provide tools and resources to schools and school systems that enable meaningful analysis of leadership, learning, and resource capacity, as well as provide tools and resources to support this level of analysis. One such

tool is the Effective Learning Environments Observation Tool® (eleot® 2.0), which focuses on student engagement and the impact of classroom instruction. The Cognia accreditation process also includes surveys, student academic performance diagnostic tools, and stakeholder feedback diagnostic tools, which are available to accredited institutions. This assures that everyone from teachers and administrators to students and parents are involved in the process of continuous improvement. CSUSA received re-accreditation in 2021 for an additional 5-year term. Please see **Addendum FF** for CSUSA's Letter and Certificate of Accreditation.

C. For applicants working with an ESP for the first time, provide summary information from reference checks conducted by the applicant (regarding the ESP), identifying each reference.

This question is not applicable as FCEF has partnered with CSUSA as an ESP previously.

D. Describe whether and how the school's board has assessed the capacity of the ESP to successfully carry out the functions necessary to operate a high-quality charter school.

FCEF evaluates CSUSA's ability to open a new school and serve the needs of students, parents, and the governing board at each opportunity for a new charter. As the FCEF portfolio expands, it becomes increasingly important for us to work with CSUSA due to their proven ability to support growth and help the governing board scale its model to new sites and locations. CSUSA's disciplined, innovative culture and research-based Education Model is crucial as FCEF strives to expand while continuing to provide quality results. FCEF has evaluated CSUSA's effectiveness based on school performance relative to annual goals set by the governing board. Performance goals include, but are not limited to, timely submission of required reports outlined in management agreements, strict adherence to each school's approved annual budget, and meeting any performance goals contained within charter contracts.

ESP Background

A. Provide the mission of the ESP and an overview of the organization's strategic vision, including, if applicable, a five-year growth plan, and rationale for managing new schools.

CSUSA's mission is to provide world-class educational solutions with an unwavering dedication to student success and an unyielding commitment to ethical and sound business practices, providing a choice for stakeholders that fosters and promotes educational excellence. CSUSA's strategic vision is to have a dramatic impact on the world's next generation – changing lives, leaving a legacy, and setting the standard by which quality is measured in education. Today, CSUSA is one of the largest school management companies in the United States.

CSUSA plans to grow its network of managed schools incrementally over the next five years. CSUSA will support its governing boards with submitting approximately 2-3 charter applications in the state of Florida this year. Over the next five years, CSUSA expects to support governing boards in submitting a similar number of applications each year both in and outside the state of Florida. In addition, CSUSA is currently scheduled to support the opening of one new school in the state of Florida for the upcoming 2024-2025 school year, the expansion of two schools in Florida, and one new school in other states where they operate. Over the course of the next five years, CSUSA plans to support governing boards with opening of approximately ten new schools.

B. Identify the ESP's leadership team and their specific roles and responsibilities. Include as Attachment BB an organization chart for the ESP.

Jon Hage – Founder and CEO

Jon Hage is one of the nation's leading social entrepreneurs committed to improving education. He founded Charter Schools USA in 1997 and as CEO, built it into one of the fastest growing companies in the U.S. with 10,000 team members educating 75,000 students in nearly 100 schools throughout the United States. CSUSA-managed schools have produced some of the strongest gains in reading, writing, science, and math in the nation, especially for minority and low-income students. Today, CSUSA has over 25,000 students on waiting lists with 96% attending college or technical schools and a 95% parent satisfaction rate. CSUSA was the first AdvancED/SACS (now Cognia) accredited education service provider in the nation. With a commitment to putting students first, he was named the 2013 Floridian of the Year by Florida Trend magazine. An Army veteran, Mr. Hage served in the U.S. Special Forces/Green Berets and holds degrees from the University of Colorado and Georgetown University.

Dr. David Christiansen – Chief of Schools

David Christiansen is Chief of Schools for CSUSA. His experience and background in raising the bar and closing the achievement gap for all students show a deep commitment and passion that each child has a right to a high-quality, excellent education. For over 30 years, Dr. Christiansen has directly impacted students' lives as a classroom teacher, principal, and district leader in large, complex, urban school systems in Florida and California. He spearheaded programs that have tremendously benefitted minority students, increased graduation rates, and earned national recognition by the College Board for closing the achievement gap on AP courses and earned state recognition for improving student academic performance on EOC tests. He is actively involved local, state, and national organizations, serving on the Advisory Board of Florida Organization of Instructional Leaders (FOIL), a national staff developer for Advancement Via Individual Determination (AVID), a 2017 graduate of Leadership Palm Beach County (LPBC), a 2016 graduate of the National Superintendents' Academy (NSA), and a previous board member of the Junior Achievement of Palm Beach and Glades Career Readiness Roundtable. He holds a Bachelor of Arts degree in Journalism from the University of North Carolina at Chapel Hill, a Master of Arts degree in Educational Leadership from Nova Southeastern University, and a doctorate degree in Educational Leadership from the University of Central Florida.

Richard Garcia – Chief Financial Officer

Richard Garcia has more than 20 years of domestic and international experience with established and entrepreneurial companies. Before joining CSUSA, Mr. Garcia was the Chief Financial Officer of Todobebe Inc. of Miami, a privately held global media company providing family entertainment and expert advice to millions of Spanish speakers worldwide through national broadcast TV, radio, digital community and content websites, promotions, and licensing. He previously served as the CFO of ION Media Networks Inc. of West Palm Beach. ION owns and operates the nation's largest broadcast television station group reaching more than 94 million U.S. television households.

Prior to ION, Mr. Garcia served as Senior Director and Controller of DirecTV Latin America LLC, a multi-national digital satellite television provider based in Fort Lauderdale, Florida that is an affiliate of the Cisneros Group of Companies. He has also served as Vice President, Chief Accounting Officer, and Controller with Claxson Interactive Group Inc. of Miami, which is another Cisneros Group affiliate and is a multi-national, publicly traded media enterprise primarily engaged in the operation of pay-television channels and radio stations in Latin America. Mr. Garcia previously served with the international accounting

and auditing firm, Deloitte & Touche LLP of Miami, as Senior Manager with a client base including a range of companies from multi-national organizations and governmental enterprises to various small to medium-sized businesses. He is a Certified Public Accountant and a graduate of Florida International University.

Jennifer Foreman – Chief Human Resources Officer

Jennifer Foreman is a seasoned leader with over 25 years of human resources experience partnering with businesses to achieve extraordinary results. Her previous positions spanned various industries, including health care and management consulting. Just prior to joining CSUSA, Mrs. Foreman was a Divisional HR Director at ChenMed headquartered in Miami, Florida. ChenMed is a health care provider to seniors across 13 states. She also served as Vice President HR at Mount Sinai Medical Center, the largest, private independent not-for-profit teaching hospital in south Florida. Prior to Mount Sinai, she was a Director of Organization Effectiveness at Tyco, based in Boca Raton FL. Tyco was the world's largest dedicated fire protection and security company.

Mrs. Foreman has also held regional and global roles in talent management and change management, as well as management consulting. She earned an M.S. in Development Studies, a B.S. in Economics from the University of the West Indies, and is a certified Senior Professional in Human Resources (SPHR).

Michael Urban – Chief Information Officer

Michael Urban brings over two decades of experience in IT leadership, aligning business strategy and technology with organizational development goals within the education industry. Michael has helped ed-tech providers and publishers develop leading digital courseware and assessment solutions across K-12, post-secondary and the continuing education verticals. He has led the transformation and design of interoperable courseware and platforms for the industry, providing timely and critical student and educator support. Michael has guided the implementation of IT infrastructure, application development and enabling technologies to allow consumers to derive the maximum value from learning products. He has developed numerous data-centric solutions to inform educational providers regarding student outcomes, and leveraged deep analytics for business and process transformation. Michael holds a BA from Vanderbilt University and an MS from Ithaca College.

Dr. Eddie Ruiz – CSUSA Florida Superintendent

Eddie Ruiz served as assistant superintendent of the Division of Student Services, Equity and Access (SSEA) for the School District of Palm Beach County, the 11th largest district in the nation serving more than 193,000 students. Much of his career has been dedicated to creating and implementing initiatives aimed at closing the gap for underrepresented students, increasing graduation rates, and ensuring students are college and career ready. Throughout his 18-year educational career, he has made meaningful contributions to the lives of students by serving as teacher, dean, assistant principal, principal, director, instructional leader, and mentor. He was named State Affiliate Latino Administrator of the Year in 2015 by the Association of Latino Administrators and Superintendents (ALAS). Dr. Ruiz earned his master's degree from the University of Phoenix and received his doctorate degree in Educational Leadership from the University of Central Florida, where he earned the prestigious Order of Pegasus award. Dr. Ruiz provides oversight of academics, school improvement, operations, and leadership development for all CSUSA-managed schools in Florida.

Dr. Sara Capwell –CSUSA Florida Deputy Director

Dr. Sara Capwell is a Deputy Director for CSUSA serving schools in Hillsborough, Pasco and Manatee counties. Dr. Capwell was selected as founding principal for both Waterset Charter School and Innovation

Preparatory Academy and has more than 26 years of educational and leadership experience. Dr. Capwell earned an Associate and Bachelor of Science degree with a concentration of study around elementary education, music, reading and science from University of Central Florida. She attained her Master of Educational Leadership from the University of South Florida and continued post graduate studies there as well as at Liberty University in Virginia and University of St. Thomas in Minnesota. She earned her doctorate degree in leadership with a focus on teacher efficacy in charter schools from Liberty University.

CSUSA's organization chart is provided as **Addendum BB**.

ESP Track Record

A. Provide evidence of organizational capacity to open and operate high-quality schools in Florida and, if applicable, elsewhere in accordance with the overall growth plan. Outline specific timelines for building or deploying organizational capacity to support the proposed school. If the ESP intends to build capacity and add positions during the term of this proposed charter school, include an organizational chart of the proposed growth within the ESP leadership structure as Attachment CC.

CSUSA has unparalleled experience and qualifications in charter school management, including team members with direct oversight to plan, design, develop, staff, operate, equip, and maintain the school facility and academic programs. For over 25 years, CSUSA has been a leader in education reform. Since inception, CSUSA's mission has been to put students first. Its commitment to providing parents and students choice drives thinking and day-to-day decisions. CSUSA can scale its model through an organized regional structure that creates smaller communities within CSUSA's network to provide support, foster collaboration, and maintain consistent accountability. This leads to consistent management at the school level and supports organizational growth from within. Internal leadership growth and the organizational knowledge that it builds is key in CSUSA's ability to implement its Education Model and other processes with fidelity throughout their managed schools.

B. Provide a comprehensive listing of ESP-operated charter schools (current and past) by completing form IEPC-M1A, which can be found at <http://www.fldoe.org/schools/school-choice/charter-schools/charter-school-reference> and attach as Attachment DD.

Form IEPC-M1A is included as **Addendum DD**.

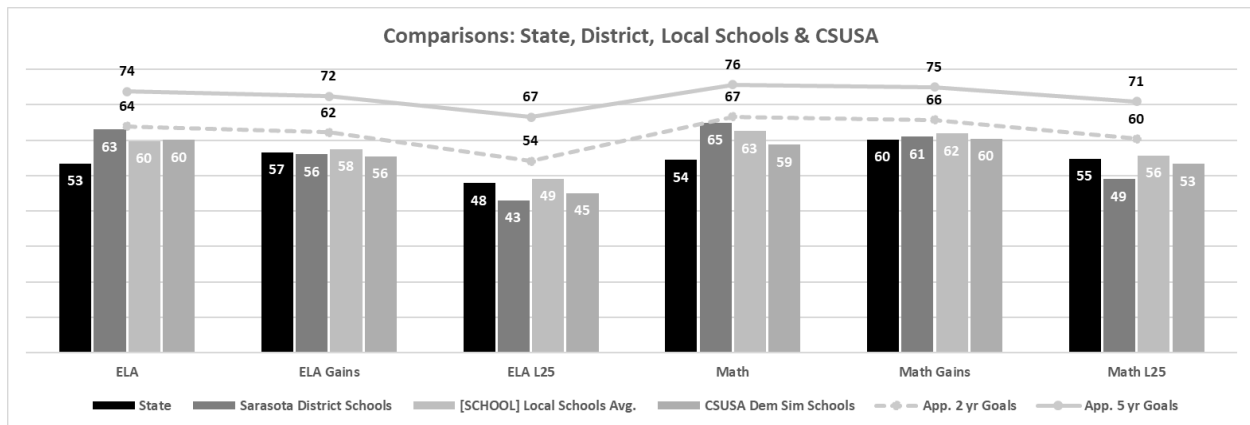
C. Explain the ESP's success in serving student populations similar to the target population of the school. Describe the ESP's demonstrated academic track record (provide specific academic results on all schools using Form IEPC-M1A, attached as Attachment DD).

The CSUSA network of managed schools, as of the 2022-2023 school year, includes 83 schools and over 75,000 students across 5 states. Sixty-four of these schools are in the state of Florida. Across the schools in Florida, 59% of students are considered economically disadvantaged and 77% of students are classified as minority populations. Of CSUSA's 64 schools in Florida, 12 are governed by FCEF for the 2023-24 school year. FCEF and CSUSA's network of schools serve a broad spectrum of student demographics, from schools with both low FRL and low minority rates to schools that serve both high FRL and minority communities. However, the average CSUSA and FCEF (50% ED, 73% minority) school has a significantly higher minority and economically disadvantaged student population than Sarasota County schools (ED 52%, Minority 39%).

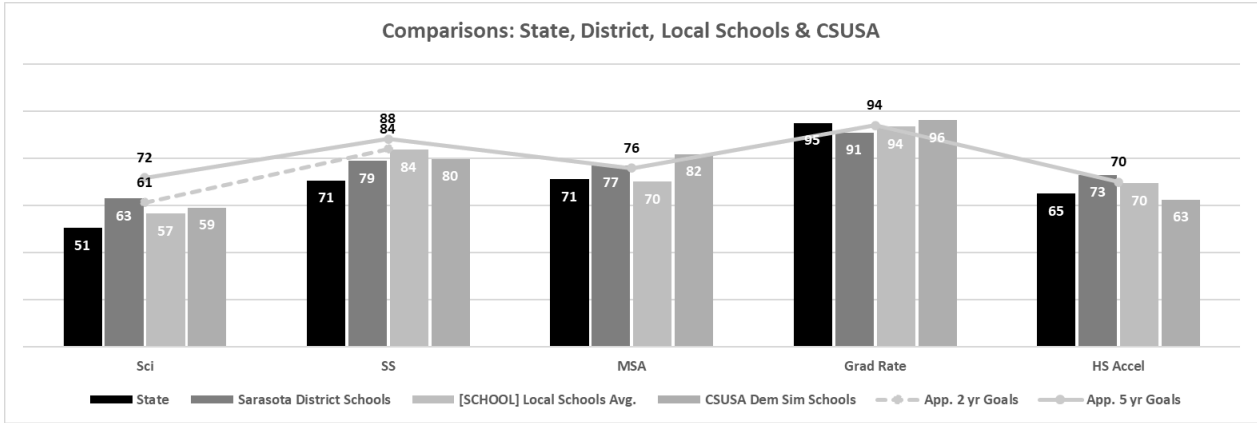
Graphs B.1 and B.2 below show Florida School Grade results (2022) for demographically similar CSUSA schools³ and CSUSA Schools categorized by tenure compared to that of the state, Sarasota County Schools, and the local school average. SCPA's 2nd and 5th year goals detailed in the example above are also provided for comparison. Overall, the data shows improvement trends the longer schools and students are part of the CSUSA network and anticipated performance that meets/exceeds local schools:

- CSUSA's demographically similar schools' (to SCPA's anticipated student population and that of the previously identified schools) performance meets or exceeds the state of Florida, Sarasota County Schools or the local schools in every school grade component with the exception of High School Acceleration.
- Science, Middle School Acceleration and Graduation Rate all exceed the local school average among CSUSA's demographically similar schools.
- Veteran (open since at least 2015) CSUSA-managed schools met/exceeded Sarasota Schools performance on all math and ELA learning gains components as well as met the state average in ELA and Social Studies proficiency.

Graph B.1 Core Subject-Area Performance

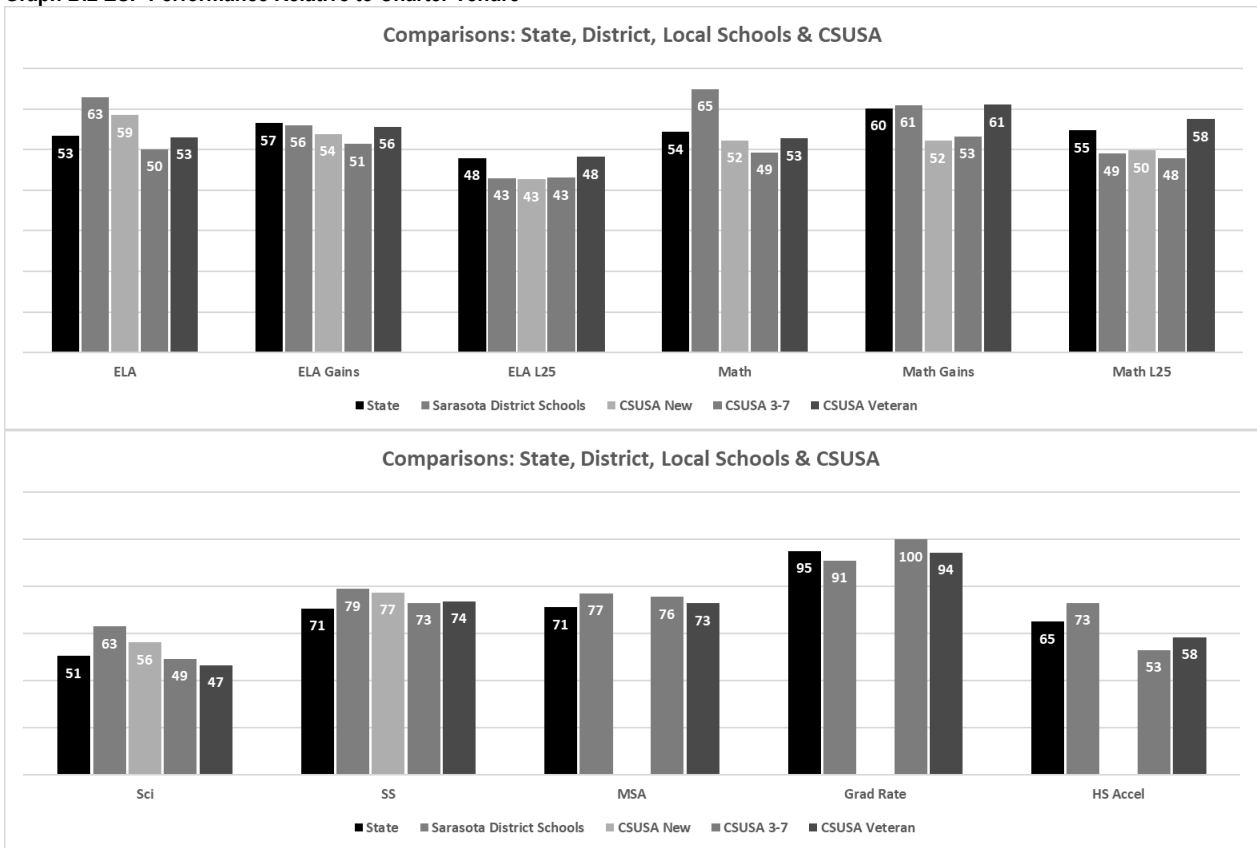


³ Demographically Similar CSUSA schools were included when they were +/- 5% points on either Minority Rate or the percentage of Economically Disadvantaged students. There was only one school that met both criteria. The average minority rate among CSUSA schools with an Economically Disadvantaged population of (+/- 5) 52% is over 74%. Conversely, the average Economically Disadvantaged population of CSUSA schools with (+/- 5) 49% minority is only 33%. CSUSA Schools included: Aventura City Of Excellence School, Collier Charter Academy, Coral Springs Charter School, Don Soffer Aventura High School, Duval Charter At Baymeadows, Duval Charter High School At Baymeadows, Duval Charter School At Coastal, Duval Charter School At Mandarin, Gateway Charter Elementary School, Gateway Charter High School, Gateway Charter Intermediate School, G-Star School Of The Arts, Hollywood Academy Of Arts And Science Middle School, Innovation Preparatory Academy, Renaissance Charter School At Hunters Creek, Renaissance Charter School Of St. Lucie, Renaissance Middle Charter School, Union Park Charter Academy, and Waterset Charter School.



Middle School Acceleration would not factor into the school grade until year 3 of the charter term—the year 5 goals shown above is only 2 years after the baseline performance of local schools (70%). Year 5 of the Charter Term would be the first year Graduation Rate and High School Acceleration would factor into the school grade. They are shown above at the baseline value calculated from local schools.

Graph B.2 ESP Performance Relative to Charter Tenure



New schools, because of the grade level ramp up would not have Middle School Acceleration, Graduation Rates or High School Acceleration in their first two years.

Please see Form IEPC-M1A in **Addendum DD** for CSUSA's network of schools' grades and FRL percentages.

D. List and explain any management contract terminations as well as any charter revocations, non-renewals, withdrawals or non-openings that the ESP has experienced in the past five (5) years.

Form IEPC-M1A, included as **Addendum DD**, lists the schools previously managed by CSUSA, which are explained below.

In 2020, the School District of Osceola, Osceola Education Foundation (the governing board) and CSUSA collaboratively agreed on a solution for the district's need for increased school capacity. Canoe Creek Charter Academy (CCCA) was built on land owned by the district and the building was leased to the Osceola Education Foundation for 30 years. The School District of Osceola requested to re-acquire the land and the school building, therefore CSUSA no longer provides management services for CCCA.

Indianapolis Public Schools (IPS) partnered with CSUSA to manage Emma Donnan Elementary School under an Innovation Network School Agreement beginning in the 2015-2016 school year. That agreement expired on June 30, 2020. Throughout the term of the agreement, Emma Donnan Elementary School achieved great academic success, attaining a school grade of A for both the 2016-17 and 2017-18 school years and showing incredible student growth in both math and ELA on state assessments.

IPS partnered with CSUSA to manage Emmerich Manual High School under a state contract beginning in the 2012-13 school year. That agreement expired on June 30, 2020. Throughout the term of the agreement, Emmerich Manual High School achieved great academic success, raising its school grade from an F to a C. Upon the expiration of the agreement, IPS chose to take control of their former school and close it under their city-wide school consolidation plan.

IPS partnered with CSUSA to manage Thomas Carr Howe High School under a state contract beginning in the 2012-13 school year. That agreement expired on June 30, 2020. Upon the expiration of the agreement, IPS chose to take control of their former school and close it under their city-wide school consolidation plan.

Prior to the start of the 2018-19 school year, the governing board of Renaissance Charter School at Central Florida located in Orange County, Florida, reluctantly decided not to open the school due to lower than anticipated enrollment.

At the end of the 2017-18 school year, the governing board of Lake Charles College Prep (Southwest Louisiana Charter Academy Foundation) located in Lake Charles, Louisiana, made the decision to operate the school independent of ESP assistance, and therefore did not renew their management agreement with CSUSA. Effective July 1, 2023, CSUSA will begin management of Lake Charles College Prep.

Success Mile Charter Academy is a K-8 start-up charter school in Warren, Michigan that had been operated by CSUSA since its inception in 2013. In April 2017, CSUSA and the Success Mile Charter Academy mutually agreed to terminate the management agreement effective June 30, 2017. Academically, the school has performed well and continues to operate. In four years of operations, the school suffered substantial under enrollment, never achieving 35% of capacity and generating over \$5 million of losses. An existing, mature K-12 charter school system in the area proposed to move its school into the facility for the 2017-18 school year. To ensure consistency of programming across the K-12 spectrum on the campus, that operator has assumed the management of Success Mile Charter Academy.

In December 2016, the Louisiana Board of Elementary and Secondary Education voted to not extend the charter contract for Baton Rouge Charter School at Mid-City. The school served one of the lowest socio-economic communities in the country and despite improving its performance each year, it was unable to surpass the threshold (driven primarily by proficiency rates) in Louisiana for extension. Louisiana also changed its state testing content each year of the school's operation and did not make any accommodations for schools serving the most at-risk populations, which created a further disadvantage for the school to achieve the proficiency-based standards.

At the beginning of the 2020-21 school year, the governing board of P.M. Wells Charter Academy (Education Foundation Osceola County) located in Osceola, Florida, made the decision to operate the school with a different education management company and not renew their management agreement with CSUSA.

There have also been instances in which CSUSA was planning to manage a charter school that did not open due to the third-party construction developer's inability to obtain the necessary site plan approvals for the proposed school. This necessitated the governing board's requirement to return the charter contracts to the authorizer.

Legal Relationships

A. Describe how the school's governing board is independent from the ESP and self-governing, including evidence of arm's-length negotiating.

FCEF is a not-for-profit 501(c)(3) tax-exempt organization, members of which are selected by and approved by the governing board and have no affiliation with CSUSA. FCEF already has appropriate ethics and conflict of interest policies in place (**Attachment K**) that are consistent with state statute. FCEF is represented by independent legal counsel and the governing board's counsel negotiates the management agreement and all other relevant agreements with CSUSA.

B. Explain whether the school has or will have any legal or contractual relationships with any subsidiaries or other entities or individuals that are affiliated⁴ with or owned in whole or in part by the ESP. If so, identify the nature of those entities' business activities and describe how the governing board will ensure that any such relationships will not pose a conflict of interest or hinder the board's authority or ability to terminate the contract with the ESP.

FCEF already has appropriate ethics and conflict of interest policies in places that are consistent with state statute. When in its best interest, FCEF has and may decide to enter into contractual relationships it believes are required to accomplish its mission. All such contract relationships, including and especially those that are related entities of CSUSA, shall be dealt with in an arm's length manner, separate from the management agreement. Any such agreements will not hinder the ability of FCEF to terminate the management agreement or otherwise hold CSUSA accountable, by and through independent counsel and in compliance with the governing board's policy as well as state and federal law.

C. Explain the supervisory responsibilities of the ESP (if any), including which school employees the ESP will supervise, how the ESP will supervise these employees, and how the school's governing board will oversee the ESP's supervisory responsibilities.

FCEF will have ultimate authority over school operations pursuant to the charter contract. FCEF will contract with CSUSA to implement and manage employment policies and procedures for FCEF. This

includes supervision of all staff. CSUSA has conducted extensive internal and external research to determine the most important elements in designing a work environment and culture to support employee performance, morale, and student achievement. As allowed in § 1002.33(12)(i), F.S., SCPA will operate as a private employer and will reflect an employment practice that will seek to mirror the diversity of the community and student population. FCEF oversees CSUSA's supervisory responsibilities through the adoption of formal policies and procedures that CSUSA is required to comply with, regular board meetings, evaluation of staff surveys, staff turnover and retention metrics, etc.

D. If the school's governing board intends to enter into a financing agreement (promissory notes, loans, leases, lease-purchase agreements, other negotiable instruments, or any other facility or financing relationships) with the ESP:

- Ensure that such agreements are or will be separately documented and not part of or incorporated in the school management contract and do not hinder the governing board's authority and practical ability to terminate the management agreement and continue operation of the school.
- Provide evidence that the agreement was or will be reviewed by the governing board's independent legal counsel or attorney and subject to a fair market analysis.
- Describe how such agreements will be repaid. Repayments should be reflected in the budget.

FCEF will not be entering into a financing agreement with CSUSA for its facility. FCEF may enter into financing agreements for the acquisition of capital items (FF&E, technology, etc.) if the governing board determines it is in the best interest of SCPA to do so. Such agreements will be formally documented, reviewed by FCEF's independent counsel, and based on fair market value. The repayment schedule will be defined in the agreement and reflected in the school's budgets adopted by FCEF.

Organizational Structure

A. Provide a description of the roles and responsibilities of the ESP. This may include whether and how the specific roles and responsibilities set forth below may or may not be provided by the ESP, in order to summarize school- and ESP-level responsibilities. If some portions of a function are the responsibility of both the ESP and the governing board, please explain. The description should align with the management agreement with the ESP and provide a clear picture of what the ESP is responsible for.

Setting Performance Goals
Selecting Curriculum

Selecting Professional Development programs

Data Management & Selecting Interim Assessments
Determining Promotion Criteria

Setting a School Culture
Student Recruitment

School Staff Recruitment & Hiring

Providing Human Resources (HR) services (payroll, benefits, etc.)
Fundraising

Managing Community Relations

Selecting and Providing Information Technology
Managing Facilities

Procuring Vendors

Other Operational and Administrative Services, if Applicable

FCEF and CSUSA roles and responsibilities are detailed below.

Function	ESP Roles and Responsibilities	Governing Board Roles & Responsibilities
Setting Performance Goals	Provides both student-level and school-level goals designed to meet national, state, and local standards.	Implements required academic reporting policies for CSUSA and reviews performance reports from CSUSA on a periodic basis.
Selecting Curriculum	Provides a customized curriculum designed to meet national, state, and local standards, including continuous program evaluation, curriculum material selection, student data analysis, and student IEPs, assessments, records, etc.	Implements required academic reporting policies for CSUSA and reviews performance reports from CSUSA on a periodic basis.
Selecting PD Programs	Provides professional/school development and implements teacher instructional support, coaching, and mentoring. Ensures government compliance and reporting regarding teacher certifications.	Reviews the School Report, which includes detailed information regarding staffing and ensures that all required staffing certifications are current and in compliance with regulatory standards.
Data Management & Selecting Interim Assessments	Provides accountability standards and sustainable performance measures designed to meet national, state, and local benchmarks/standards.	Implements required academic reporting policies for CSUSA and review performance reports on a periodic basis. Sets policies to ensure the school's programs are faithful to the terms of the charter, including compliance with statutory and regulatory requirements.
Determining Promotion Criteria	Provides compensation planning & performance evaluations.	Annually adopts, maintains, and amends (if necessary) the annual operating budget. Reviews the School Report, which includes detailed information regarding staffing
Setting a School Culture	Implements the school's mission and vision via the curriculum and disciplinary policies and standards. Provides assistance in coordinating parent, teacher, and student organizations.	Ensures that the school's mission and vision is being implemented with fidelity. Sets policies to ensure the school's programs and operations are faithful to the terms of the charter, including compliance with statutory and regulatory requirements
Student Recruitment	Assesses demographic and market needs and develops the enrollment marketing plan.	Reviews the School Report, which includes detailed information regarding student enrollment.
School Staff Recruitment & Hiring	Provides personnel administration: hire principals, teachers and other staff and implements personnel procedures and ongoing staffing assistance.	Sets policies to ensure the school's programs and operations are faithful to the terms of the Charter, including compliance with statutory and regulatory requirements. Reviews the School Report, which includes detailed information regarding staffing.
Providing Human Resources (HR) services (payroll, benefits, etc.)	Provides employee benefits, Worker's Compensation and 401(k) management services, and directly manages the school's payroll.	Annually adopts, maintains, and amends (if necessary) the annual operating budget. Implements required financial reporting policies for CSUSA and reviews performance reports from CSUSA on a periodic basis.
Managing Community Relations	Provides assistance in coordinating parent, teacher, and student organizations and manages the school's community partnerships.	Adheres to regularly scheduled governing board meetings in a manner compliant with Open Meeting Laws. Communicates with parents and the community and resolves grievances not rectified at the school level.
Selecting and Providing Information Technology	Designs and develops technology labs and student stations. Provides local and wide area network installation; remote access and software integration; email hosting; and	Annually adopts, maintains, and amends (if necessary) the annual operating budget. Implements required financial reporting policies for CSUSA and reviews performance reports

Function	ESP Roles and Responsibilities	Governing Board Roles & Responsibilities
	technology support. Maintains the SIS and school website.	from CSUSA on a periodic basis.
Managing Facilities	Provides strategic financing and construction partnerships. Assists in site acquisition and/or lease negotiations, and liaisons with building and/or renovation team to ensure quality and design standards are met. Provides operational design of classrooms and school space and programmatic input for functionality purposes. Procures furniture, fixtures, equipment, and supplies, and secures basic utility services (phone, water, electric, and disposal service).	Annually adopts, maintains, and amends (if necessary) the annual operating budget. Sets operational policies to ensure the school's operations are faithful to the terms of the Charter, including compliance with statutory and regulatory requirements. Reviews the School Report, which includes detailed information regarding the school's facility issues.
Procuring Vendors	Negotiate contracted services with vendors (food, transportation, security, custodial, etc.).	Annually adopts, maintains, and amends (if necessary) the annual operating budget. Sets operational policies to ensure the school's operations are faithful to the terms of the Charter, including compliance with statutory and regulatory requirements.

4 The term “affiliated” means and includes one or more corporations or entities under the same or substantially the same control of a group of business entities which are connected or associated so that one entity controls or has the power to control each of the other business entities. The term “affiliated” includes, but is not limited to, the officers, directors, executives, shareholders active in management, employees, and agents of the affiliated corporation. The ownership by one business entity of a controlling interest in another business entity or a pooling of equipment or income among business entities shall be prima facie evidence that one business is affiliated with the other.

B. Describe the oversight and evaluation methods that the board will use to oversee the ESP. What are the school-wide and student achievement results that the ESP is responsible for achieving? How often, and in what ways, will the board review and evaluate the ESP's progress toward achieving agreed-upon goals (e.g. external evaluator, surveys, or performance data analyses)? What are the conditions, standards, and procedures for board intervention, if the ESP's performance is deemed unsatisfactory?

FCEF will oversee CSUSA via a performance-based management agreement, a draft of which is included as **Addendum EE**. FCEF will also monitor and evaluate the progress of achieving the school's agreed upon goals using the school's financial, academic, and operational reports, which will be presented monthly at each governing board meeting. If there are any recurring shortfalls or perceived distresses in the school's financial, academic, or operational aspects; then FCEF, SCPA, and CSUSA will work collaboratively and proactively to correct the identified shortfalls and ensure the school is able to meet its goals in the future.

C. Describe the payment schedule, including all fees, bonuses, early termination penalties, and any other compensation to be paid to the ESP.

As is shown in the 5-year operating budget included as **Attachment X**, FCEF will pay the proposed fees for management services. Furthermore, FCEF will approve the school's budget on an annual basis, and the budget will include the fee for services percentage. CSUSA will not require any bonuses or early termination fees from SCPA or FCEF.

D. Describe the types of spending decisions the management organization can make without obtaining board approval? What reports must the ESP submit to the board on financial performance, and on what schedule? How will the school governing board provide financial oversight?

CSUSA cannot make any spending decision without the governing board's approval. FCEF will approve the school's budget on an annual basis and all spending must be in line with the approved budget. FCEF will receive the school's financial reports, and FCEF will submit the school's financial reports to the district. FCEF will provide financial oversight via the governing board's finance committee or liaison who will communicate and work with CSUSA's finance team to review the school's financial performance and be proactive in addressing any identified shortfalls.

E. What is the term (duration) of the management agreement? Explain the conditions and procedures (including time frames, notice, and decision-making procedures) for renewal and termination of the contract? Describe the conditions that both the ESP and the school must satisfy for the management agreement to be renewed. On what grounds may the ESP or the governing board terminate the management agreement for cause? List any indemnification provisions in the event of default or breach by either party. If these provisions are addressed in the management agreement, the applicant may cite the specific sections.

The term of the management agreement between FCEF and CSUSA will align with the term of SCPA charter contract. Once CSUSA's performance reporting requirements in the school's last contract year are submitted to FCEF and it is determined that the terms and conditions of the agreement were fulfilled, the management agreement will be renewed for the term of the renewed charter contract. If the terms and conditions of the management agreement are not being fulfilled and SCPA is not making progress towards the goals agreed upon by FCEF and CSUSA, the governing board may terminate the agreement. Please see Article VIII of the proposed management agreement included as **Addendum EE** for indemnification provisions.

F. Provide as Attachment EE, a draft of the proposed management agreement with the ESP.

Please see **Addendum EE** for a draft of the proposed management agreement.

Chart of Attachments

Please tab or separate attachments as noted below

- A. Evidence of teacher and parental support for conversion, if applicable. **(N/A)**
- B. Sample daily school schedule and annual school calendar
- C. Sample curriculum scope and sequence
- D. Reading curriculum
- E. Student Progression plan, if applicable
- F. Assessment Schedule
- G. Proposed discipline policy or student code of conduct, if applicable
- H. Articles of incorporation
- I. 501(c)(3) tax-exempt status determination letter (or copy of the filing form)
- J. Governing board by-laws
- K. Governing board code of ethics and conflict of interest policy
- L. For each board member, a Board Member Information Sheet, resume, and Statement of Assurances (templates provided)
- M. Organization charts that show the school governance, management, and staffing structure in 1) the pre-operational year; 2) the first year of operation; 3) at the end of the charter term; and 4) when the school reaches full capacity, if in a year beyond the first charter term
- N. Job description for the school leader and, if this person is already identified, his or her resume
- O. If the school leader is not yet identified, the qualifications the school will look for in a school leader
- P. Job description(s) and qualification requirements for each administrative or leadership position other than the school leader
- Q. Job description(s) and qualification requirements for the school's teachers
- R. Personnel policies, if developed
- S. Student enrollment application
- T. Evidence of demand for the school (e.g. petitions or intent to apply forms) or support from intended community partners (e.g. letters of intent/commitment, memoranda of understanding, or contracts), if applicable
- U. Evidence of facility funding sources, if applicable **(N/A)**
- V. Draft rental agreement or lease for facility, if applicable **(N/A)**
- W. Florida Charter School Revenue Estimating Worksheet
- X. Proposed Operating Budget
- Y. Proposed Startup Budget
- Z. Evidence of external funding (e.g. foundations, donors, grants), if applicable **(N/A)**

Addendum (as applicable)

- AA. Commissioner's letter(s) of verification of high-performing status (N/A)
- BB. ESP's organization chart
- CC. ESP's organization chart after any anticipated growth **(N/A)**
- DD. Applicant history worksheet (*Form IEPC-M1A*)
- EE. Draft contract between school and ESP
- FF. Applicant may attach up to an additional ten pages of supplemental material

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Attachment B

Sample Daily Schedule
School Calendar