



THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA
Landings Administrative Complex
1980 Landings Blvd.
9:00 AM

April 12, 2022 Monthly Work Session

Call to Order

1. LEGISLATIVE UPDATE

Description

Speakers: Megan Fay and Ron LaFace from Capital City Consulting

Recommendation

Financial Impact:

Contact:

ASPLEN

2. FLORIDA HOUSE

Description

Guest speaker: Amber Whittle

Recommendation

Financial Impact:

Contact:

DUMAS

3. STRATEGIC PLAN - GOAL 3

Description

Recommendation

Financial Impact:

Contact:

FOSTER

4. INCLUDED IN GOAL 3 DISCUSSION: TELADOC MENTAL HEALTH SERVICES
Description
Recommendation
Financial Impact:
Contact:
PETERSON
5. OPERATING BUDGET
Description
Recommendation
Financial Impact:
Contact:
CORCORAN & CURTNER
6. IMPACT FEE STUDY
Description
Recommendation
Financial Impact:
Contact:
DUMAS
7. CAPITAL IMPROVEMENT PLAN (CIP)
Description
Recommendation
Financial Impact:
Contact:
DUMAS
8. ELEMENTARY PROGRESS MONITORING
Description
Recommendation
Financial Impact:
Contact:
JOHNSON & ELLINGTON
9. NEW CHARTER SCHOOL APPLICANT

Description

Recommendation

Financial Impact:

Contact:

CANTALUPO & WHEELER

10. MEMBERS COMMENTS

Description

Recommendation

Financial Impact:

Contact:

GOODWIN

Adjournment



April 12, 2022 Board Meeting
Agenda Item 1.

Title

LEGISLATIVE UPDATE

Description

Speakers: Megan Fay and Ron LaFace from Capital City Consulting

Recommendation

Contact

ASPLEN

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Presentation	4/14/2022	Cover Memo



2022 End of Session Report
Sarasota County School District
April 12, 2022
Megan Fay and Ron LaFace

BUDGET OVERVIEW



Budget Highlights

FEFP and General Appropriations Act Highlights:

- \$24.3B total K-12 budget
 - \$156M for FRS Increase (statewide)
 - \$319M for FTE growth (69,558 FTE)
 - \$400M for \$15/hour requirement (estimated)
 - Total obligated = \$875M
 - Flexible/BSA \$ left = \$128M
 - Inflation, gas prices, and decreased funding for virtual students
- Base Student Allocation Increase: \$214.49
- Total Funds per UFTE: \$8,142.85
- VPK-8 Progress Monitoring: \$15.5M
- Teacher Pay: \$250M increase
 - Half must be dedicated to increasing minimum teacher salaries to \$47,500 (if the district is not already there) and the other half can be used to increase salaries for veteran educators who make above \$47,500.
- Transportation Categorical: \$56M increase
- Mental Health Allocation: \$20M increase
- Reading Allocation: \$40M increase
- HB 7071 Taxation provides that School Capital Outlay Surtax funds are authorized for the purchase, lease-purchase, or lease of school buses and maintenance vehicles (lines 607-610).

Budget Highlights

Implementing Bill - School Recognition: \$200M

- The implementing bill excludes school districts that implemented a mask mandate in defiance of the DOH emergency rule from this pot of funding even if schools meet the other statutory criteria.

SB 2524 – Education Conforming Bill

- Changes to the Reading Categorical:
 - Increased flexibility to spend reading categorical dollars
 - Eliminates the current requirement that a district's reading plan must be approved by FDOE
 - Creates pathway for teachers to earn a micro-credential in reading that can be earned instead of the reading endorsement
 - Micro-credential will be developed by the University of Florida Lastinger Center
- Expands Choice Transportation - Expands the use of transportation funds to specify that student transportation funds may be used to pay for specified alternative vehicles when a school bus is impractical, or to support parents or carpools
- Longevity Payments - Requires that compensation for longevity of service awarded to instructional personnel who are not on a performance pay salary schedule must be used in the calculation of salary adjustments for highly effective or effective teachers.

K-12 Education – Bills that Passed

SB 1048 - Student Assessments by Sen. Diaz (Approved by Governor on 3/15/22)

Eliminates the Florida Standards Assessment (FSA) and substantially modifies Florida's statewide standardized assessment program to include a computer-based coordinated screening and progress monitoring tool for K-8 English Language Arts and Mathematics. The bill provides that progress monitoring results must provide teachers and parents with actionable feedback to tailor instruction and develop programs and supports, and the end-of-year assessment must be used for all existing accountability purposes. It also provides a one-year transition to the new statewide standardized assessments, which will hold students and schools harmless during the transition. Finally, it requires the Commissioner of Education to provide recommendations on additional ways to streamline testing.

HB 1557 - Parental Rights in Education by Rep. Hawkins (Approved by Governor on 3/28/22)

Nicknamed the "Don't Say Gay" bill in the press, the bill requires that school districts adopt procedures for notifying parents if there is a change in their student's services or monitoring related to a student's mental, emotional, or physical health or well-being. The bill specifies that a school district may only withhold information from a parent if a prudent person would reasonably believe that disclosure would subject the student to abuse, abandonment, or neglect. Additionally, the bill also prohibits instruction on sexual orientation or gender identity in kindergarten through grade 3 or in a manner that is not age-appropriate or developmentally appropriate for students.

K-12 Education – Bills that Passed

HB 7 - Individual Freedoms by Rep. Avila

- Includes provisions designed to protect individual freedoms and prevent discrimination in the workplace and in public schools.
- The bill specifies that subjecting any individual, as a condition of employment, membership, certification, licensing, credentialing, or passing an examination, to training, instruction, or any other required activity that espouses, promotes, advances, inculcates, or compels such individual to believe certain specified divisive concepts constitutes unlawful discrimination.
- The bill defines individual freedoms based on the fundamental truth that all individuals are equal before the law and have inalienable rights. Accordingly, the bill requires that instruction, instructional materials, and professional development in public schools be consistent with principles of individual freedom.

HB 758 – Education by. Sen. Diaz

- Creates the Charter School Review Commission (CSRC) that will review and approve of charter school applications. The school district where the charter school is located will continue to be the sponsor.
- The bill requires that the State Board of Education appoints the membership of the CSRC and that the appointees be Senate confirmed.
- Authorizes DOE to contract with a college or university to provide administrative and technical assistance to the commission.

K-12 Education – Bills that Passed

HB 1467 - K-12 Education by Rep. Garrison (Approved by Governor on 3/25/22)

- Establishes 12-year term limits for school board members in lieu of changes or elimination of school board member salaries; and
- Increases transparency and public involvement in the selection and removal of school library materials and instructional materials.

HB 225 - Charter School Charters by Hawkins

The bill revises provisions relating to charter school charters to:

- Specify that a charter may be modified at any time, during any term;
- Require that a request for the consolidation of multiple charters be approved or denied within 60 days after submission of the request;
- Require that any sponsor who denies a request for consolidation to provide the charter school's governing board with the specific reasons for the denial within 10 days;
- Specify that a sponsor provide notice to a charter school of a decision to renew, terminate, or not renew before a vote and at least 90 days before the end of the school year; and
- Provide for the automatic renewal of a charter if notification does not occur at least 90 days before the end of the school year.

K-12 Education – Bills that Passed

HB 235 - Restraint of Students with Disabilities in Public Schools by Plascencia

- For students with disabilities in public schools, the bill revises requirements relating to the use of mechanical and physical restraint.
- The bill prohibits the use of mechanical restraint by school personnel except for school resource officers, school safety officers, school guardians, or school security guards, who may use mechanical restraint in the exercise of their duties to restrain students in grades 6 through 12. However, devices prescribed or recommended by physical or behavioral health professionals may still be used for their indicated purposes.
- And the bill allows authorized school personnel to use appropriate physical restraint as permitted by existing law.

HB 899 - Mental Health of Students by Hunschofsky

- The bill specifies that charter schools must comply with involuntary examination data reporting requirements established by the Legislature in 2021 for traditional public schools and requires the Department of Education to share all school-related involuntary examination data, including charter school data, with the Department of Children and Families by July 1 of each year.
- The bill requires that DCF use this data in its biennial analysis of involuntary examinations of minors.
- The bill requires school districts to identify a mental health coordinator that will serve as the primary point of contact regarding the district's student mental health policies, procedures, responsibilities, and reporting.

K-12 Education – Bills that Passed

SB 1054 - Financial Literacy Instruction in Public Schools by Hutson (Approved by Governor on 3/22/22)

- The bill requires that, beginning with students entering grade 9 in the 2023-2024 school year, students must earn one-half credit in personal financial literacy and money management in order to receive a standard high school diploma.
- The bill establishes financial literacy standards within the Next Generation Sunshine State Standards beginning in the 2023-2024 school year and thereafter.
- Financial literacy standards must, at a minimum, establish personal financial literacy and money management.

HB 921 - Campaign Financing by State Affairs Committee (Approved by Governor on 4/6/22)

- Section two of the bill makes changes to the criteria for how local governments and their advocates are authorized to communicate to the public regarding the contents of a ballot referendum.

K-12 Education – Bills that Passed

HB 1421 - School Safety by Hawkins

The bill:

- Requires district school boards and charter school governing boards to adopt a plan that guides family reunification when K-12 public schools are closed or unexpectedly evacuated due to natural or manmade disasters.
- Requires that the State Board of Education adopt rules setting requirements for emergency drills including timing, frequency, participation, training, notification, and accommodations.
- Requires that law enforcement responsible for responding to schools in the event of an assailant emergency be physically present and participate in active assailant drills.
- Requires that school safety and environmental incident reporting data be published annually in a uniform, statewide format that is easy to read and understand.
- Requires that safe-school officers that are sworn law enforcement officers to complete mental health crisis intervention training.
- Requires safe-school officers that are not sworn law enforcement officers to receive training on incident response and de-escalation.
- Extends authorization of the MSD Commission until July 1, 2026, for the purpose of monitoring implementation of school safety legislation.
- Requires the Commissioner of Education to oversee and enforce school safety and security compliance in the state.

K-12 Education – Bills that did NOT Pass

HB 985/SB 974 - Sovereign Immunity

- Both chambers proposed increasing the Sovereign Immunities limits
- Bills did not pass so limits maintain status quo - \$200K per individual claim/\$300K aggregate claims arising from a single event

HB 5101 – Education

- Would have eliminated districts' ability to offer virtual franchise and virtual charter school options
- Changes to virtual school funding did pass in SB 2524

HB 1327/SB 270 - Funds for Student Transportation

- Would have required districts to pick up students living more than one mile from school instead of two miles (current law).

SB 1086 - Exceptional Student Due Process Hearings

- Would have required school districts to prove by a preponderance of the evidence in all exceptional student due process hearings that any challenged identification, evaluation, and eligibility determination, or lack thereof, was appropriate.

K-12 Education – Bills that did NOT Pass

HB 961/SB 766 - Schools of Innovation

- Would have established the Schools of Innovation Program within DOE and flexibility for schools of innovation relating to award of credit & letter grades.

SB 1644 - Limitation on Terms of Office for Members of a District School Board

- Proposed joint resolution to the State Constitution that would have limited school board members to eight-year terms.
- HB 1467, which did pass, implemented twelve-year term limits.

HB 35/SB 244 - Partisan Elections for Members of District School Boards

- Proposed amendment to the State Constitution to require members of district school board to be elected in partisan election.

HB 865/SB 622 - Florida Institute for Charter School Innovation

- Would have established the Florida Institute for Charter School Innovation at Miami Dade College to improve charter school authorizing practices in the state and provided a \$1M appropriation.



April 12, 2022 Board Meeting
Agenda Item 2.

Title

FLORIDA HOUSE

Description

Guest speaker: Amber Whittle

Recommendation

Contact

DUMAS

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Florida House	4/6/2022	Cover Memo



Photo credit: Brilliant
Harvest



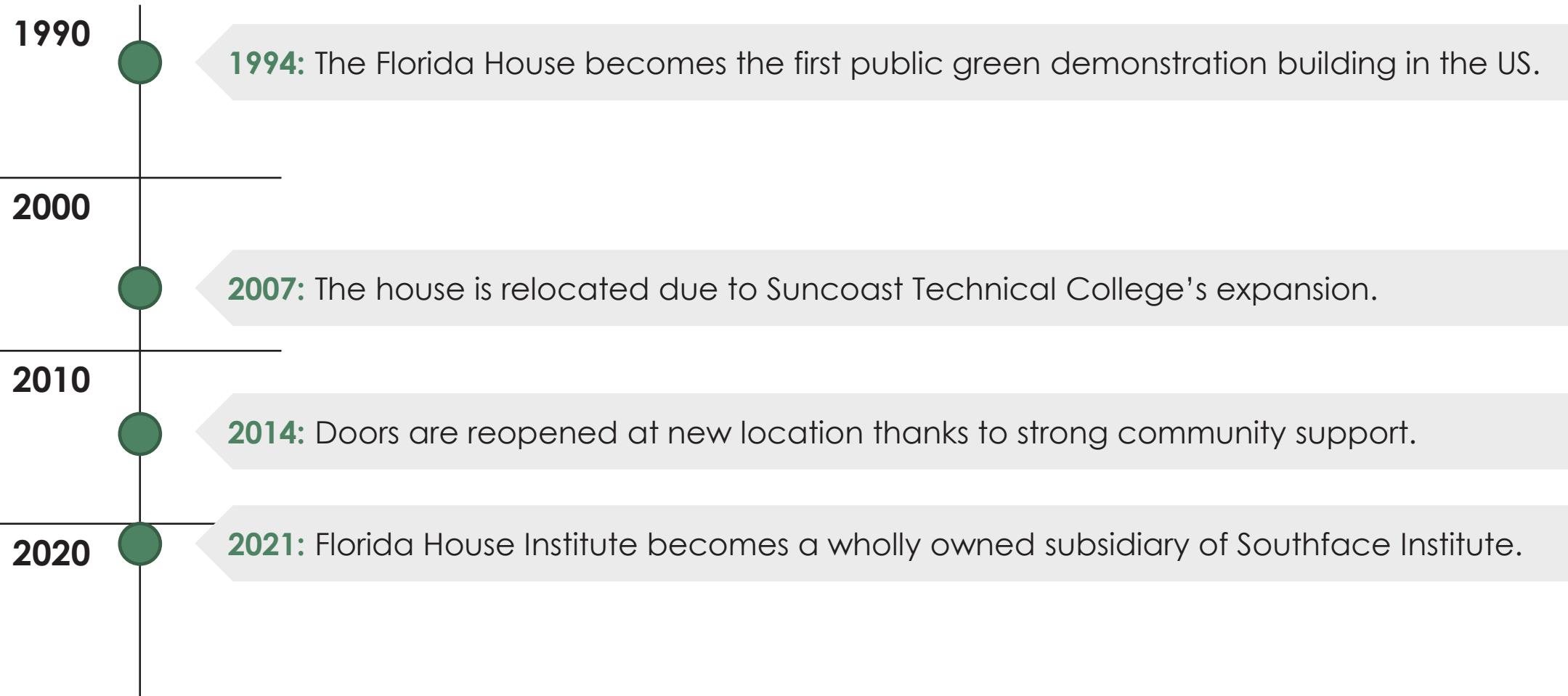
Southface Sarasota at the Florida House: A Strong Partnership

Sarasota County School Board

April 12, 2022

Amber Whittle, PhD

Florida House History



Southface Sarasota Mission and Vision

Mission

To promote sustainable homes, workplaces and communities through education, research, advocacy, and technical assistance.

Vision

A healthy environment for all, achieved and sustained through the equitable application of building science.



Green Demonstration House & Garden Tours



- ~100 tours
- ~2,000 community volunteer hours, half by local HS students
- \$32k in-kind sustainable vendor donations
- Host for the Watershed Improvement Network
- Host for Partners for Green Places
- Energy Efficiency Advocacy

Our gardens

- Permaculture
- Food forest
- Pollinator Garden
- Vegetable Garden
- Native-forward
- Shade/urban heat islands
- Stormwater retention



Medicines of the Rainforest



Community Partnerships: Transitions Sarasota



Over 200 pounds of fresh organic produce donated to
Church of the Palms since Dec 2021

Community Partnerships: Sunshine Community Compost



Educational Partnerships



- Suncoast Technical College
- Polytechnical High School
- RHS Media Club
- Wilkinson Elementary STEAM
- Fab Lab
- 5th-grade STEM field trips (2014-7)
- Universities (USF Medicines of the Rainforest, New College Soil Research, Cross-College Alliance Interns)

Educational Partnerships: STC



- 2,200 hours of green workforce training with the plumbing, construction, electrical, and HVAC students
- Location shoot for Digital Arts students
- Special-needs culinary students
- Compost program

Educational Partnerships: The Future



- Schools & Sustainability Partnership with the Charles & Margery Barancik Foundation
- Restarting STEM programming in conjunction with the Fab Lab (tentative Foundation funder)
- Researching market demand and creating a “green badge” for trades in partnership with STC (tentative Foundation funder)
- Incorporating Florida House in the curriculum for STC students
- Greenhouse & pervious pavers (Duckwall Foundation & tentative)
- Interpretive tour (tentative Foundation funder)

Thank you!

Amber Whittle, PhD

Executive Director, Southface
Sarasota

VP Development, Marketing &
Communications

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April 12, 2022 Board Meeting
Agenda Item 3.

Title

STRATEGIC PLAN - GOAL 3

Description

Recommendation

Contact

FOSTER

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Goal 3	4/7/2022	Cover Memo
Goal 3	4/8/2022	Cover Memo

STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

Strategy 2
Provide an Exceptional
Employee Experience

Strategy 1
Enhance Recruitment Efforts



Strategy 3
Refine and Communicate
Compensation and Benefits

STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

OUTCOME METRICS

METRIC 1: Increase the percentage of vacancies that are filled by the October FTE survey date.

METRIC 2: Increase customer satisfaction of services provided by the Human Resources Department.

METRIC 3: Increase the number of qualified applicants for posted positions.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

PRIORITY STRATEGIES

- **STRATEGY 1:** Enhance recruitment efforts to attract qualified and diverse applicants to decrease vacancies in all departments.
- **STRATEGY 2:** Provide an exceptional employee experience to promote retention of high-quality employees.
- **STRATEGY 3:** Refine and communicate a competitive compensation and benefits plan.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY LEVEL PROGRESS REFLECTION

Strategy	Heat Map Reflection
Enhance recruitment efforts to attract qualified and diverse applicants to decrease vacancies in all departments.	The foundational planning, networking and initial work to ensure future success is underway.
Provide an exceptional employee experience to promote retention of high-quality employees.	We have made consistent progress and with continued investment we can sustain our progress.
Refine and communicate a competitive compensation and benefits plan.	We have made consistent progress and with continued investment we can sustain our progress.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

OVERALL GOAL 3 PROGRESS REFLECTION

MAJOR ACCOMPLISHMENTS

- We have restructured the HR department to maximize efficiency.
- We continue to collaborate with multiple technology providers to update and streamline processes.
- We have connected with foundations and other stakeholders to provide innovative programs.
- Our recruitment team has expanded efforts to include classified and substitute positions and to compete in the challenging labor market.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

OVERALL GOAL 3 PROGRESS REFLECTION

MAJOR ACCOMPLISHMENTS

- Our negotiations team has worked to increase our salaries.
 - Classified salaries increased \$2/hour.
 - Instructional salaries increased 5.25% to a starting rate of \$50,000.
 - Three salary lanes were added to the classified salary schedule for technical positions.
- We have done a Request for Proposal (RFP) to select a firm/consultant to complete a comprehensive districtwide compensation study and analysis.
- In collaboration with Strategic Plan Goal 2: Foster a Healthy and Supportive Learning Environment for All, we have continued to promote and expand our staff mental and physical health and wellness initiatives.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

OVERALL GOAL 3 PROGRESS REFLECTION

PERCEIVED CHALLENGES

- The current labor market has created significant challenges in the district's efforts to fill positions at all levels (classified, instructional, and administrative).
- Over the past few years the department has added HR activities including recruitment, investigations, financial calculations, certification responsibilities, and enhanced hiring processes. We are very grateful for the net addition of two positions for the 2021-22; however, with the additional responsibilities and the increased workload caused by the current labor market, the HR staff is stretched thin with all the needs in the department.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

OVERALL GOAL 3 PROGRESS REFLECTION

TOPICS TO DISCUSS WITH LEADERSHIP

- Overall, we are very excited that Human Resources is part of the district's strategic plan, and we are happy with the progress made toward our key strategies this year.
- We want to thank you for supporting our department. Over the years the district has added positions to the department that have made a tremendous difference.
- HR University will be offered on June 2, 2022, to provide information to all administrators in the following areas:
 - Hiring, Certification, and Staffing
 - Employee Relations, Equity, Salary, and Leaves
 - Risk Management, Wellness, and Benefits



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

OVERALL GOAL 3 PROGRESS REFLECTION

TOPICS TO DISCUSS WITH LEADERSHIP

- Our goal is to transition from a transactional HR department to a strategic department by ensuring that we, as a district, continue to prioritize our people – the key factor to our students' success. We look forward to continuing to work with the Board and our leadership team to integrate our HR activities into the instruction arena to impact instruction. Although funding, community involvement, instructional strategies, and other factors contribute to school improvement, the best people get the best results for students. Our goal is to work with our leadership team to put the best person on every seat on the bus throughout the district to impact student achievement.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 1- Enhance Recruitment Efforts to Attract Qualified and Diverse Applicants to Decrease Vacancies in All Departments.

KEY ACCOMPLISHMENTS

- Increased in-person job fairs at school sites and community locations
- Virtual Teacher Job Fair
- Partnership with local organizations
- Increased attendance at college/university recruitment events
- Increased applicant pool
- Greater connectivity with applicants and cost center heads
- Enhanced advertisements for events and recruitment
- Sourcing of candidates through multiple platforms
- HR Sponsorship funds



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 1- Enhance Recruitment Efforts to Attract Qualified and Diverse Applicants to Decrease Vacancies in All Departments.

PERCEIVED CHALLENGES

- Limited ability to reach candidates without advertising on a larger scale
- Decreased engagement with candidates when using a virtual format for job fairs
- Recruiting for very specific positions that are not common to all cost centers
- Diminished customer service due to high volume of requests
- Impact on instructional focus due to increased need for classified recruitment



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 1- Enhance Recruitment Efforts to Attract Qualified and Diverse Applicants to Decrease Vacancies in All Departments.

IMMEDIATE NEXT STEPS

- Develop data dashboard
- Continue focus on diversity recruitment efforts
 - Revitalization of Cultural Diversity Enrichment Association (CDEA)
 - Work with local sorority to share opportunities
 - Explore local fraternity networking opportunities
- Offset expense of drug test and fingerprints
- Deep dive into the applicant tracking system
- Offer advanced contracts for the following school year



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 2 – Provide an Exceptional Employee Experience to Promote Retention of High-Quality Employees.

KEY ACCOMPLISHMENTS

- Many procedures have been updated and streamlined including payment of stipends, resignation forms, Board reports, paperwork for contracts and extra duty days, benefit enrollment eligibility, and more.
- We have started the process to convert all employee files to digital records with an estimated completion date of June.
- We have divided the cost centers into three Employee Engagement Teams to provide more personalized customer service to our schools and cost centers.
- We revamped the New Employee Orientation to create an interactive and informative webinar that is welcoming and develops positive HR relationships with our new employees.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 2 – Provide an Exceptional Employee Experience to Promote Retention of High-Quality Employees.

KEY ACCOMPLISHMENTS

- All new hires receive a phone call from their HR Generalist to welcome them to the district, establish relationships as HR point of contact, and answer questions.
- HR Generalists offer monthly check-in meetings with all cost center heads and attend bid meetings for transportation, facilities, and food and nutrition.
- The department has added many new HR responsibilities including the calculation and processing of salary raises, contracts, and extra duty days from the finance team; certification responsibilities for approximately 500 teachers at the charter schools; recruitment for classified and instructional positions; and investigations for all schools and departments, with over 300 investigations already this year.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 2 – Provide an Exceptional Employee Experience to Promote Retention of High-Quality Employees.

PERCEIVED CHALLENGES

- We are still working on getting buy-in from all schools/cost centers regarding HR generalist support.
- We continue to work on different ways to effectively communicate with all employees.
- Certification assuming responsibility for charter schools does not allow for the same level of customer service for school board employees, i.e. sending notices of certification needs/renewal information/updates.
- Housing investigations in the HR department has many advantages; however, it is a challenge to have all stakeholders understand that a fair and thorough investigation takes time to complete.
- Implementation of bachelor's +30 and master's +45 will initially take time for certification to verify.
- We are using three subs to scan 5,200 active employee files and then 1,000 retention files. The project is exciting but will take some time to complete.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 2 – Provide an Exceptional Employee Experience to Promote Retention of High-Quality Employees.

IMMEDIATE NEXT STEPS

- HR University will be offered on June 2, 2022, to provide information to all administrators in the following areas:
 - Hiring, Certification, and Staffing
 - Employee Relations, Equity, Salary, and Leaves
 - Risk Management, Wellness, and Benefits
- At HR University, we will provide an administrator binder with important information related to all areas of our department.
- Our department is working with John Reichert to update all surveys including hiring, stay, and exit.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 2 – Provide an Exceptional Employee Experience to Promote Retention of High-Quality Employees.

IMMEDIATE NEXT STEPS

- In collaboration with Urban Schools Human Capital Academy (USHCA), our team is working to create a dashboard/visual display of HR metrics to be shared with Cabinet, principals, and cost center heads.
- USHCA will offer customer service training for all employees in our department.
- In collaboration with the technology department, we are exploring the creation of a mobile employee app to make communication more accessible for all.
- Our HR generalists and recruiters are connecting with business partners to provide welcome bags for all new employees.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 3 – Refine and Communicate a Competitive Compensation and Benefits Plan.

KEY ACCOMPLISHMENTS – Salary & Contract Negotiations

- As a result of salary negotiations, classified salaries were increased \$2/hour bringing our base hourly rate for Board appointed employees to \$14.36, and instructional salaries were increased 5.25% to a starting annual salary of \$50,000.
- Three salary lanes were added to the classified salary schedule to address the need for a technical salary schedule for specialized technology positions.
- The results of contract negotiations were shared with principals during a Zoom meeting and were shared with all employees through email.
- The HR generalists have hosted multiple sessions for teachers on the addition of the +30/+45 lanes to the salary agreement.
- We have done a Request for Proposal (RFP) to select a highly qualified and experienced firm/consultant to complete a comprehensive districtwide compensation study and analysis.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 3 – Refine and Communicate a Competitive Compensation and Benefits Plan.

KEY ACCOMPLISHMENTS – Benefits & Wellness

- District has successfully implemented a new benefit system with Businessolver fully funded by technology credits from benefit providers in the amount of \$274,000 per year.
- Benefit and Wellness Fairs are provided bi-annually to provide employees the opportunity to obtain benefit and wellness information from benefit and wellness providers, as well as obtain preventative health screenings.
- District has an established Employee Wellness Program that continues to provide programming for staff, including both physical and mental health activities.
- We distribute a quarterly HR newsletter to all employees.
- Biometric Health Screenings were completed at 1/3 of school sites for 2021-2022.
- Starting in 2024, wellness exam requirement will be tied to employee health benefit options.
- Barancik Foundation has agreed to provide funds to offer employee groups districtwide and to build a wellness space for employees at Tuttle Elementary as a pilot program.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 3 – Refine and Communicate a Competitive Compensation and Benefits Plan.

PERCEIVED CHALLENGES

- The competitive job market leads to challenges in creating competitive salary schedules.
- We are in the process of selecting a firm or consultant to complete a comprehensive districtwide compensation study and analysis. Once that work is complete, we will need to revise how we handle the creation and revision of job descriptions and how we handle salary placement and movement across salary schedules in order to maintain the results of the salary study.
- When we look at creating a competitive compensation and benefits plan, it is important to also consider the cost of living in Sarasota for our employees.
- Employees can choose not to engage in activities related to their benefits.
- With competing priorities, we continue to try to determine the best avenues to provide wellness opportunities to meet employee needs.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

STRATEGY 3 – Refine and Communicate a Competitive Compensation and Benefits Plan.

IMMEDIATE NEXT STEPS

- Analyze and adjust salary schedules to reflect an equitable and competitive salary structure for all positions.
- Create a fiscally responsible compensation salary structure that is fair, equitable, and accessible online.
- Implement a communication campaign to promote and educate applicants and employees about the district's compensation package and incentives.
- Collaborate with key stakeholders to establish an intranet system to provide employees simple and easy access to all benefit, wellness, and incentive programs.
- Continue to develop and deliver data driven wellness programs that enhance overall employee engagement, reduce turnover, and provide a fulfilling employee experience.



STRATEGIC PLAN

Goal 3 – Recruit, Recognize, and Retain a Premier Workforce.

Strategy 2
Provide an Exceptional
Employee Experience

Strategy 1
Enhance Recruitment Efforts

THANK
YOU!

Strategy 3
Refine and Communicate
Compensation and Benefits



HEAT MAP KEY

1. Stalled – requires initiation and/or needs urgent and decisive action	2. Needs Attention – aspects need urgent and/or substantial attention	3. Mixed – Some aspects on track, some require attention	4. Good – requires refinement with systematic and systemic implementation
Complete – Activity Milestone has been completed as outlined			

GOAL 3: RECRUIT, RECOGNIZE, AND RETAIN A PREMIER WORKFORCE.

Goal Lead: Dr. Allison Foster

Goal 3 Description

The HR department will create an organizational structure that drives HR excellence and innovation to position the district as an employer of choice. The goal is to transition from a transactional HR department to a strategic HR department by ensuring that we continue to prioritize our people – the key factors of our students’ success. This includes attracting the best candidates to work in our school system and supporting them throughout their career so that they want to continue working and growing in our district. A strategic HR department is more forward-thinking and compliments the goals of the district.

Goal 3 Rationale

The goal of the HR department is to support all employees and to help them in fulfilling their personal goals and in implementing the district's vision of "working as one for the success of all!" It is important to drive HR excellence and innovation by creating an organizational structure that maximizes the use of technology and streamlines operations and information. Key areas of focus include

Sarasota County Schools Strategic Plan Stocktake:

March 2022

enhancing recruitment and retention strategies to attract and retain qualified and diverse individuals to the organization; promoting an exceptional employee experience through a culture of employee engagement, belonging and dignity, and wellness that leads to overall employee well-being, productivity, and retention; and by refining and communicating the compensation and benefits plan.

Goal 3 Definition of Success

The Human Resources Department will become a strategic part of the organization with the focus on recruiting, recognizing, and retaining high quality employees who have a direct impact on student achievement; all employees will understand the role they play in fulfilling the district's vision and mission; and Sarasota County Schools will be regarded as an employer of choice in the community and throughout the state.

Goal 3 Metrics

- 1) Increase the percentage of vacancies that are filled within ten days by the October FTE survey date.
- 2) Increase customer satisfaction of services provided by the Human Resources Department.
- 3) Increase the number of qualified applicants for posted positions.

GOAL 3	TARGETS																				
Metrics	Baseline Values	Fall 2021	Winter 2022	Spring 2022	Summer 2022	Fall 2022	Winter 2023	Spring 2023	Summer 2023	Fall 2023	Winter 2024	Spring 2024	Summer 2024	Fall 2024	Winter 2025	Spring 2025	Summer 2025	Fall 2025	Winter 2026	Spring 2026	Summer 2026
I					TBD				+2%				+2%				+2%				+2%
2					TBD				+2%				+2%				+2%				+2%
3					TBD				+2%				+2%				+2%				+2%

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Goal 3 Strategies

- 1) Enhance recruitment efforts to attract qualified and diverse applicants to decrease vacancies in all departments.
- 2) Provide an exceptional employee experience to promote retention of high-quality employees.
- 3) Refine and communicate a competitive compensation and benefits plan.

Strategy Level Progress Reflection

Strategy	Heat Map Reflection
Enhance recruitment efforts to attract qualified and diverse applicants to decrease vacancies in all departments.	3: The foundational planning, networking and initial work to ensure future success is underway.
Provide an exceptional employee experience to promote retention of high-quality employees.	3: We have made consistent progress and with continued investment we can sustain our progress.
Refine and communicate a competitive compensation and benefits plan.	3: We have made consistent progress and with continued investment we can sustain our progress.

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Overall Goal 3 Progress Reflection

Major Accomplishments	<ul style="list-style-type: none">• We have restructured the HR department to maximize efficiency which has included the creation of two Employee Engagement Teams for school sites with an HR Generalist, Recruiter, Salary Specialist, and Certification Specialist and one Employee Engagement Team focused on Food and Nutrition, Transportation, and Facilities with an HR Generalist and Salary Specialist to provide more personalized customer service to our schools and cost centers.• We continue to collaborate with multiple technology providers to update and streamline processes including contracting the services of AxiomPro to convert all employee records to digital files; working with ESD to generate electronic Board reports; providing online access of benefits to all employees through Businessolver; revamping the New Employee Orientation to create a live webinar that is welcoming and interactive to create a positive HR relationship with new employees; and updating our Winocular access to create a more user-friendly, online application system for applicants and administrators.• We have connected with foundations and other stakeholders to provide innovative programs including connecting with the Barancik Foundation to continue the Emerging Educator Program, establishing wellness and retention activities like Employee Groups, and communicating to employees the affordable housing initiative Lofts on Lemon; working with the Community Foundation to expand 2Gen opportunities for parents to secure full-time employment in the district; and collaborating with the Education Foundation and district departments to hire graduating seniors into SCS positions.• Our recruitment team has expanded efforts to compete in the challenging labor market by hosting weekly job fairs at school sites to attract parents and other community members and by participating in virtual and in-person recruitment events in the state and throughout the country to recruit diverse and high-quality instructional and administrative staff. We have also started an exciting initiative to hire graduating seniors into district positions to begin a career with Sarasota County Schools.• Our negotiations team has worked to refine and communicate our compensation and benefits plan. As a result of salary negotiations, classified salaries were increased \$2/hour bringing our base hourly rate for Board appointed employees to \$14.36, and instructional salaries were increased 5.25% to a starting annual salary of \$50,000. Three salary lanes were added to the classified salary schedule to address the need for a technical salary schedule for specialized technology positions.• We have done a Request for Proposal (RFP) to select a highly qualified, well established, and experienced firm/consultant to complete a comprehensive district wide compensation study and analysis.• In collaboration with Strategic Plan Goal 2: Foster a Healthy and Supportive Learning Environment for All, we have continued to promote and expand our staff mental and physical health and wellness initiatives. The Barancik
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	<p>Foundation has agreed to provide funds to offer Employee Groups districtwide and to build a wellness space for employees at Tuttle Elementary as a pilot program. In addition to collaborating with community partners to explore opportunities to expand programming we continue to offer established wellness activities including Wellness Champions; Wellness Incentive, Prevention Pays; onsite screenings including mobile mammography, dermatology, and biometric health screenings; Wellness Center at the Landings; two annual health expos; and innovative programs available through Florida Blue.</p>
Perceived Challenges	<ul style="list-style-type: none">• The current labor market has created significant challenges in the district's efforts to fill positions at all levels (classified, instructional, and administrative). The HR department has made significant changes to recruit, recognize, and retain employees, which has helped our district to attract quality candidates for all positions. Our recruitment team has had great success with our new approach to filling classified and substitute positions by hosting mini job fairs throughout the district to reach out to parents and community members.• Over the past few years the department has added HR activities including recruitment for classified and instructional positions; investigations for all schools and departments, which is nearing 300 for the current school year; the responsibility for the calculation and processing of salary raises, contracts, and extra duty days from the finance team; certification responsibilities for all charter schools; and enhanced hiring processes to comply with DOE and state guidelines and procedures. We are very grateful for the net addition of two positions for the 2021-22; however, with the additional responsibilities and the increased workload caused by the current labor market, the HR staff is stretched thin with all the needs in the department.
Topics to discuss with leadership	<ul style="list-style-type: none">• Overall, we are very excited that Human Resources is part of the district's strategic plan, and we are happy with the progress made toward our key strategies this year. We look forward to working with the district as well as key stakeholders to "Recruit, Recognize, and Retain a Premier Workforce!" In the current competitive labor market, we need to continue to evaluate our recruitment, retention, and compensation efforts to make sure we are staying competitive with other school districts in the state and local businesses.• We want to thank you for supporting our department. Over the years the district has added positions to the department that have made a tremendous difference.<ul style="list-style-type: none">• Recruiters – (added 2019-2020) – The two recruiters have allowed our department to actively recruit in the competitive labor market for both instructional and classified positions.• Investigators – (added 2020-2021) – The two investigators that were added have made a tremendous difference in how our district handles investigations creating a more efficient and comprehensive system with legal input when needed. We have handled nearly 300 investigations this year.

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- HR Generalists (added 2021-2022) – The three HR generalists have allowed our department to offer enhanced customer service for schools, cost centers, and employees to provide an exceptional employee experience.
- HR Trainer (added 2022-2023) – The new trainer being added next year will allow our district to provide trainings and support for classified employees who are looking to advance in the district.
- HR University – June 2, 2022 – We are very excited about our upcoming event for all administrators. We hope the Board will be available to attend the event! Here are sample topics that will be covered:

Hiring/Certification/Staffing

- Employment Application Process
- SCSB Hiring Process
- Staffing Process
- Recruitment Strategies
- Certification Requirements
- Out-of-Field Guidelines

Employee Relations/Equity/Salary and Leaves

- Overview of Federal and State Laws
- Review of Collective Bargaining Agreements
- Public Records Law/Employee Files
- Attendance/Leaves of Absence
- Equity Process/Discrimination & Harassment
- Code of Ethics Review/Discipline – Investigative Process
- PIP/IAP Process

Risk Management/Wellness/Benefits

- Benefits Offered
- Wellness Initiatives
- Workers' Compensation
- Occupational Safety
- Liability (including Student Accidents, Public Incidents, Bus Accidents)
- Contracts and Rental Agreements
- DROP/Retirement Overview
- COBRA

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	<ul style="list-style-type: none">• Our goal is to transition from a transactional HR department to a strategic department by ensuring that we, as a district, continue to prioritize our people – the key factor to our students’ success. This includes attracting the best candidates to work in our school system and supporting them throughout their career so that they want to continue working and growing in our district. It will take the entire leadership team to shift our thinking to embrace a strategic approach to human capital. Our work with Betsy Arons and the Urban Schools Human Capital Academy has really provided an insight into how different districts utilize human capital to impact student achievement. We look forward to continuing to work with the Board and our leadership team to integrate our HR activities into the instruction arena to impact instruction. Although funding, community involvement, instructional strategies, and other factors contribute to school improvement, the best people get the best results for students. Our goal is to work with our leadership team to put the best person on every seat on the bus throughout the district to impact student achievement.
Goal Metric Updates	<ul style="list-style-type: none">• We are working with Urban Schools Human Capital Academy on what metrics to capture and the best way to do it.

STRATEGY I: ENHANCE RECRUITMENT EFFORTS TO ATTRACT QUALIFIED AND DIVERSE APPLICANTS TO DECREASE VACANCIES IN ALL DEPARTMENTS.

Goal Leads: Danielle Schwied, Rashea Johnson, and Christina Rogers-Hehr

Strategy I

Description

The HR department's recruitment team continues to enhance recruiting efforts including marketing and communication to attract and hire qualified and diverse individuals for all positions in the district.

Rationale

The district is facing a competitive labor market due to competing opportunities and shifting skill demands. The HR recruitment team is focused on enhancing recruitment efforts to create a more qualified and diverse applicant pool. A growing number of studies provide conclusive evidence that teacher quality is the primary school-related factor affecting student achievement. Students who are taught by effective and competent teachers excel quickly, while those who are assigned to the least effective teachers lag behind and often never catch up. Also, a diverse staff leads to a more inclusive environment for employees and students. According to a study from the National School Boards Association, minority students have better academic performance, improved graduation rates, and are more likely to attend college when they are instructed by teachers of color.

Definition of Success

Success looks like a greater applicant pool that is consistently built throughout the year leading up to the start of school. By working to develop this pool, our team will be able to better assist in supporting cost centers with hiring needs and contributing to a more diverse workforce.

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Strategy I Activities

- 1) Continue to establish collaborative relationships with local foundations, universities, and other partners to promote the district and recruit staff.
- 2) Work with community-based and district-based groups to enhance diversity recruiting efforts.
- 3) Continue to streamline the application process to successfully engage quality applicants through the hiring process.
- 4) Collaborate with the Communications department to expand branding, marketing efforts, social media presence, candidate sourcing, and proactive recruitment efforts.
- 5) Host and attend multiple job fairs throughout the year to attract and retain qualified and diverse candidates.

Strategy I Activity Milestones with Progress Monitoring Targets

Activity 1: <i>Continue to establish collaborative relationships with local foundations, universities, and other partners to promote the district and recruit staff.</i>		2021-2022	2022-2023	2023-2024
1	Have a team of administrators participate in the Urban Schools Human Capital Academy and present to other administrators and district leaders.	Summer 2022		
2	Strengthen our partnership with SCF, Women's Resource Center, Children First, and other local agencies to promote and share employment opportunities within the district.		Fall 2022	
3	Partner with universities to host interns, provide information sessions with the interns, and offer jobs to successful interns upon successful completion of their program.		Winter 2022-2023	
4	Partner with HBCUs and HACUS to recruit diverse applicants to our district.		Summer 2023	
5	Work with the Community Foundation to establish 2Gen opportunities for parents.			Fall 2023

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Activity 2: <i>Work with community-based and district-based groups to enhance diversity recruiting efforts.</i>		2021-2022	2022-2023	2023-2024
1	Meet with equity committee to brainstorm ideas for recruitment and retention.	Summer 2022		
2	Put together a small focus group consisting of teachers and administrators of color from across the county/district to discuss areas of improvement.		Winter 2022-2023	
3	Foster strong relationships with different organizations and community groups of diverse individuals.		Spring 2023	

Activity 3: <i>Continue to streamline the application process to successfully engage quality applicants through the hiring process.</i>		2021-2022	2022-2023	2023-2024
1	Continue to improve connectivity with applicants (post-event follow-up messages, check-in emails, etc.) to ensure they are engaged and, therefore, make it through the application process.	Summer 2022		
2	Increase communication with cost center heads to understand their needs and ultimately be able to make more informed candidate matches.		Fall 2022	
3	Work with other departments to communicate training opportunities to eliminate obstacles caused by testing and certification requirements at all levels (classified, instructional, and administrative).			Summer 2024

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Activity 4: <i>Collaborate with the Communications department to expand branding, marketing efforts, social media presence, candidate sourcing, and proactive recruitment efforts.</i>		2021-2022	2022-2023	2023-2024
1	Reach out to businesses and foundations to request donations/funding for district recruitment efforts.		Fall 2022	
2	Expand advertising to multiple employment websites.		Fall 2022	
3	Create a marketing recruitment strategy with creative recruitment materials and engaging themes (e.g., Teach by the Beach, SRQ - Sarasota County Schools R ecruits, R ecognizes, and R etains Q uality Teachers & Staff)!		Summer 2023	

Activity 5: <i>Host and attend multiple job fairs throughout the year to attract and retain qualified and diverse candidates.</i>		2021-2022	2022-2023	2023-2024
1	Host multiple job fairs (virtual and in-person) throughout the year as needed.	Summer 2022		
2	Create strategic recruiting plan each year and attend multiple job fairs (virtual and in-person) to recruit and attract diverse employees to the district.		Fall 2022	
3	Advertise job opportunities in diverse publications and job boards.		Fall 2022	
4	Increase attendance at recruitment fairs and events at colleges and universities with high percentages of diverse populations.			Fall 2023

Strategy I Progress Reflection

Major Accomplishments	<ul style="list-style-type: none"> Increased in-person job fairs at school sites and community locations Hosted district's first ever Virtual Teacher Job Fairs Developing data dashboard with Urban Schools Human Capital Academy (USHCA) Partnership with local organizations (Barancik Foundation, Women's Resource Center, Children First, 2Gen contacts)
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	<ul style="list-style-type: none">• Increased attendance at college/university recruitment events with strong emphasis on local schools (New College, SCF, USF)• Revitalization of Cultural Diversity Enrichment Association (CDEA) to promote recruitment and retention of diverse staff• Improved connectivity with applicants through multiple recruiter touch points and support with application process• Growing applicant pool and developed more efficient tracking through applicant database• Increased connectivity with cost center heads/ principals regarding staffing needs• Enhanced advertisement for events and recruitment efforts through social media, district website, Florida Department of Education website, Connect Ed communication, print and radio ads• Sourcing of candidates through multiple platforms (Indeed, LinkedIn, Frontline, ZipRecruiter, Handshake)• Integrated WinOcular application system with Indeed• Procured HR Sponsorship funds from local business partners to support recruitment efforts
Perceived Challenges	<ul style="list-style-type: none">• Limited ability to reach candidates without advertising on a larger scale• Decreased engagement with candidates when using a virtual format for job fairs• Recruiting for very specific positions that are not common to all cost centers• Diminished customer service due to high volume of requests• Impact on instructional focus due to increased need for classified recruitment
Immediate Next Steps	<ul style="list-style-type: none">• Develop data dashboard• Continue focus on diversity recruitment efforts<ul style="list-style-type: none">- Revitalization of Cultural Diversity Enrichment Association (CDEA)- Work with local sorority to share opportunities- Explore local fraternity networking opportunities• Offset expense of drug test and fingerprints• Deep dive into the applicant tracking system• Offer advanced contracts for the following school year

STRATEGY 2: PROVIDE AN EXCEPTIONAL EMPLOYEE EXPERIENCE TO PROMOTE RETENTION OF HIGH-QUALITY EMPLOYEES.

Goal Leads: Al Harayda, Valeta Clark, Alanna Smith, and Calyn Tully

Strategy 2

Description

The purpose of this strategy is to set new hires up for success and promote an exceptional experience for ALL employees starting with recruitment, followed by on-boarding, retention, and engagement. Studies indicate that companies with an effective onboarding process are able to better retain and engage employees, and engaged employees are more likely to remain with the company (reduced staff turnover).

Rationale

By promoting an exceptional employee experience and creating a culture of customer service, employees are more likely to view Sarasota Schools as a premier employer. Additionally, wellness and recognition programs show employees that the company values them; this increases their morale and keeps them with the district for a longer time. Continuity of staff remaining within the district has potential to impact academic achievement. By focusing our efforts on employee engagement beginning with the recruitment process, our employees will begin their employment journey on the right path to a successful lifespan within the district, reduce turnover, and strengthen our culture.

Definition of Success

Success looks like a delivery model that offers an exceptional employee experience through the entire employee life cycle. The Human Resources department will evolve into a "one-stop-shop" where employees and applicants can go to have all their employment needs met. Employees will have access to a work environment that embraces and values belonging and dignity by helping all employees feel part of the district's culture leading to increased employee engagement and reduced turnover.

Strategy 2 Activities

- 1) Create a welcoming first impression for all new employees to the district.
- 2) Establish and administer customer satisfaction surveys and analyze the data to identify process improvements.

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- 3) Provide exceptional customer service to all employees to promote a supportive work environment that embraces and values belonging and dignity.
- 4) Promote, support, and leverage technology, resources, and tools to respond to customer needs, improve and enhance workflow efficiency, and improve customer service.
- 5) Establish an employee recognition program to enrich the district's culture, increase employee engagement, reduce turnover, and provide a fulfilling employee experience.

Strategy 2 Activity Milestones with Progress Monitoring Targets

Activity 1: <i>Create a welcoming first impression for all new employees to the district.</i>		2021-2022	2022-2023	2023-2024
1	Revamp NEO to create a live webinar that is welcoming and interactive to create a positive HR relationship with all new employees.	Winter 2021-2022		
2	HR generalists will reach out to all new employees to welcome them to the district and to guide them through the onboarding process.	Summer 2022		
3	Create New Hire Guides for new employees and cost center administrators.		Summer 2023	
4	Provide a welcome bag to all new employees with promotional materials from district business partners.		Summer 2023	

Activity 2: <i>Establish and administer customer satisfaction surveys and analyze the data to identify process improvements.</i>		2021-2022	2022-2023	2023-2024
1	Conduct electronic customer satisfaction surveys for the hiring process for all new Board appointed employees. Use the results to continue to improve the hiring process.		Fall 2022	

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2	Send electronic customer satisfaction surveys to all employees after they have contacted the department for assistance with HR needs. Use the data to improve processes.			Winter 2023-24
3	Improve and distribute exit surveys electronically and present the data to Cabinet for district-wide planning purposes.			Winter 2023-24

Activity 3: <i>Provide exceptional customer service to all employees to promote a supportive work environment that embraces and values belonging and dignity.</i>		2021-2022	2022-2023	2023-2024
1	HR Generalists will meet monthly with cost center heads to check-in, answer questions, and establish positive relationships.	Winter 2021-22		
2	Enhance HR's efficiency by creating Employee Engagement Teams dividing cost centers to provide excellent customer service.	Winter 2021-22		
3	Distribute a quarterly newsletter that communicates the services provided in HR and shares, explains, and reinforces the district's culture.	Spring 2022		
4	Establish and communicate an organizational structure that adequately addresses all HR areas. Provide customer service training for all leaders and front office staff.		Fall 2022	
5	Provide customer service training for all leaders and front office staff.		Winter 2022-23	

Activity 4: <i>Promote, support, and leverage technology, resources, and tools to respond to customer needs, improve and enhance workflow efficiency, and improve customer service.</i>		2021-2022	2022-2023	2023-2024
1	Partner with Businessolver to create intranet benefits website.	Winter 2021-22		

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2	Create interactive, welcoming, and user-friendly HR web resources for interested applicants.		Winter 2022-23	
3	Begin efforts to create digital employee records.		Spring 2023	
4	Work with ESD, Winocular, Businessolver, and other partners to maximize technology resources to better serve all employees.			Fall 2023
5	Work with technology department to create one online location where employees can view their information: salary, benefits, certifications, professional development credits, etc.			Spring 2024

Activity 5: <i>Establish an employee recognition program to enrich the district's culture, increase employee engagement, reduce turnover, and provide a fulfilling employee experience.</i>		2021-2022	2022-2023	2023-2024
1	Continue with districtwide SREOY program.	Summer 2022		
2	Set up a committee to outline employee recognition program objectives.			Spring 2024
3	Develop years of service recognition program (1 year, 5 year, etc.).			Spring 2024
4	Create online platform for district-wide employee recognition.			Winter 2024-25

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Strategy 2 Progress Reflection

Major Accomplishments	<ul style="list-style-type: none">• Many procedures have been updated and streamlined including payment of stipends, resignation forms, Board reports, paperwork for contracts and extra duty days, benefit enrollment eligibility, and more.• We have started the process to convert all employee files to digital records with an estimated completion date of June.• We have divided the cost centers into three Employee Engagement Teams to provide more personalized customer service to our schools and cost centers.• We revamped the New Employee Orientation to create an interactive and informative webinar that is welcoming and develops positive HR relationships with our new employees.• All new hires receive a phone call from their HR Generalist to welcome them to the district, establish relationships as HR point of contact, and answer questions.• HR Generalists offer monthly check-in meetings with all cost center heads and attend bid meetings for transportation, facilities, and food and nutrition.• The department has added many new HR responsibilities including the calculation and processing of salary raises, contracts, and extra duty days from the finance team; certification responsibilities for approximately 500 teachers at the charter schools; recruitment for classified and instructional positions; and investigations for all schools and departments, with over 300 investigations already this year.
Perceived Challenges	<ul style="list-style-type: none">• We are still working on getting buy-in from all schools/cost centers regarding HR generalist support.• We continue to work on different ways to effectively communicate with all employees.• Certification assuming responsibility for charter schools does not allow for the same level of customer service for school board employees, i.e. sending notices of certification needs/renewal information/updates.• Housing investigations in the HR department has many advantages; however, it is a challenge to have all stakeholders understand that a fair and thorough investigation takes time to complete.• Implementation of bachelor's +30 and master's +45 will initially take time for certification to verify.• We are using three subs to scan 5,200 active employee files and then 1,000 retention files. The project is exciting but will take some time to complete.

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Immediate Next Steps

- HR University will be offered on June 2, 2022, to provide information to all administrators in the following areas:
 - Hiring, Certification, and Staffing
 - Employee Relations, Equity, Salary, and Leaves
 - Risk Management, Wellness, and Benefits
- At HR University, we will provide a binder with important information related to all areas of our department.
- Our department is working with John Reichert to update all surveys including hiring, stay, and exit.
- In collaboration with Urban Schools Human Capital Academy (USHCA), our team is working to create a dashboard/visual display of HR metrics to be shared with Cabinet, principals, and cost center heads.
- USHCA will offer customer service training for all employees in our department.
- In collaboration with the technology department, we are exploring the creation of a mobile employee app to make communication more accessible for all.
- Our HR generalists and recruiters are connecting with business partners to provide welcome bags for all new employees.

STRATEGY 3: REFINE AND COMMUNICATE A COMPETITIVE COMPENSATION AND BENEFITS PLAN.

Goal Leads: Allison Foster, Al Harayda, Lynn Peterson, and Erin Singerman

Strategy 3

Description

The strategy is to ensure the district provides and communicates a comprehensive, fair, and equitable compensation and benefits plan to attract and retain the most qualified employees for all positions.

Rationale

Maintaining a strong salary structure is important to the success of any organization. Personnel costs in school districts typically make up 80-85% of the total budget. It is important for the district to conduct regular reviews of salaries and benefits to ensure that the district is staying competitive with comparable and surrounding districts and other industries. When there is a shortage of employees, especially in key areas, it is important to conduct salary studies to make necessary changes to the salary schedule. Benefits also play a key role in the overall compensation package. Our district has always offered an attractive benefits program. The hope is by improving the communication of the overall compensation, incentive, and benefits package, the HR department will be able to provide qualified applicants and current employees with the necessary knowledge and information about the value of the complete compensation package that the district provides.

Definition of Success

Success looks like an increased number of qualified applicants for all positions and a higher retention rate for all positions, especially jobs that are difficult to fill. Success also is a better understanding of benefits as demonstrated by an increase in staff preventative care visits and engagement with district wellness initiatives.

Strategy 3 Activities

- 1) Analyze and adjust salary schedules to reflect an equitable and competitive salary structure for all positions.
- 2) Create a fiscally responsible compensation salary structure that is fair, equitable, and accessible online.
- 3) Implement a communication campaign to promote and educate applicants and employees about the district's compensation package and incentives.

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- 4) Collaborate with key stakeholders to establish an intranet system to provide employees simple and easy access to all benefit, wellness, and incentive programs.
- 5) Continue to develop and deliver data driven wellness programs that enhance overall employee engagement, reduce turnover, and provide a fulfilling employee experience.

Strategy 3 Activity Milestones with Progress Monitoring Targets

Activity 1: <i>Analyze and adjust salary schedules to reflect an equitable and competitive salary structure for all positions.</i>		2021-2022	2022-2023	2023-2024
1	Establish a Technical Salary Schedule.	Summer 2022		
2	Complete a salary analysis of all positions to determine salary inequities.		Spring 2023	
3	During negotiations, address "hard-to-fill" areas by adjusting salary schedules when necessary. Conduct salary studies on key positions identified by Cabinet.		Spring 2023	
4	Clearly define salary schedules and movement between salary schedules (e.g., classified to instructional, instructional to administrative).		Summer 2023	
5	Establish clear placement system on salary schedules for new employees.		Summer 2023	
6	Update all job descriptions to align with salary schedules.			Spring 2024

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Activity 2: <i>Create a fiscally responsible compensation salary structure that is fair, equitable, and accessible online.</i>		2021-2022	2022-2023	2023-2024
1	Host meetings with principals and cost center heads to inform them about decisions made regarding contract negotiations.	Spring 2022		
2	Produce an annual compensation book and make available online.			Winter 2023-24
3	Create compensation system that allows applicants to understand what their salary will be prior to applying for a position.			Winter 2023-24
4	Create an objective salary placement system that promotes fair and equitable salaries for all positions.			Winter 2023-24
5	Clearly communicate with Cabinet the district salary structure and salary placement process. Work with Cabinet to implement a fiscally responsible compensation plan.			Winter 2023-24

Activity 3: <i>Implement a communication campaign to promote and educate applicants and employees about the district's compensation package and incentives</i>		2021-2022	2022-2023	2023-2024
1	Implement HR quarterly newsletter to include compensation and benefit information for all employees.	Fall 2021		
2	Provide recruiters with compensation and benefits package details for distribution at recruitment events.	Spring 2022		
3	Begin monthly benefit reminders to be sent to employees via the benefit system.		Fall 2022	
4	Email routine tips to all employees about benefits and wellness.		Fall 2022	
5	Create a landing page on the benefit system for perspective employees to view the district's complete compensation and incentive package.			Fall 2023

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Activity 4: <i>Collaborate with key stakeholders to establish an intranet system to provide employees simple and easy access to all benefit, wellness, and incentive programs.</i>		2021-2022	2022-2023	2023-2024
1	Work with different providers to fund Businessolver program.	Fall 2021		
2	Communicate how to access Businessolver to all employees.		Winter 2022-23	
3	Monitor use of intranet system and make adjustments to best meet employee needs.			Winter 2023-24
Activity 5: <i>Continue to develop and deliver data driven wellness programs that enhance overall employee engagement, reduce turnover, and provide a fulfilling employee experience.</i>		2021-2022	2022-2023	2023-2024
1	Maintain Wellness Champions to support and promote District and on-site employee wellness programs.	Fall 2021		
2	Use data analysis to identify wellness programs through review of FL Blue claims data, health screening data, and annual employee interest surveys.			Winter 2023-24
3	Share evidence-based wellness programs with district leadership including principals, assistant principals, and cost center heads to obtain support, and make programs accessible to all staff.			Spring 2024
4	Expand on-site preventative screenings to include every school or department site at least once every 36 months.			Summer 2025

Strategy 3 Progress Reflection

Major Accomplishments	<p><u>Salary & Contract Negotiations</u></p> <ul style="list-style-type: none"> As a result of salary negotiations, classified salaries were increased \$2/hour bringing our base hourly rate for Board appointed employees to \$14.36, and instructional salaries were increased 5.25% to a starting annual salary of \$50,000.
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- Three salary lanes were added to the classified salary schedule to address the need for a technical salary schedule for specialized technology positions.
- The results of contract negotiations were shared with principals during a Zoom meeting and were shared with all employees through email.
- The HR generalists have hosted multiple sessions for teachers on the addition of the +30/+45 lanes to the salary agreement.
- We have done a Request for Proposal (RFP) to select a highly qualified, well established, and experienced firm/consultant to complete a comprehensive district wide compensation study and analysis.

Benefits & Wellness

- District has successfully implemented a new benefit system with Businessolver fully funded by technology credits from benefit providers in the amount of \$274,000 per year. The new benefit system has the capability to customize benefit communication to employees and deliver the communication in the method of employee's desired method of receipt. The Businessolver system has a virtual assistant, Sophia, to educate employees on benefits and assist with benefit questions and selections. The new benefit system was successfully introduced to all employees during 2022 Open Enrollment with 91% employee participation.
- Benefit and Wellness Fairs are provided bi-annually to provide employees the opportunity to obtain benefit and wellness information from benefit and wellness providers, as well as obtain preventative health screenings.
- District has an established Employee Wellness Program that continues to provide programming for staff, including both physical and mental health activities. Current wellness programming includes:
 - Emotional wellbeing and mental health activities included in Goal 2 Stocktake
 - Wellness Champions at all school sites and cost centers
 - Wellness Incentive, Prevention Pays
 - Onsite screenings to include mobile mammography, dermatology, and biometric health screenings
 - Onsite flu vaccine clinics at all school sites
 - Two health expos, one in North County in the fall and a second in South County in the spring
 - Wellness challenges, webinars, and other activities
 - Wellness Center at the Landings
 - Programs available through Florida Blue, including free health coaching, gym membership programs, lifestyle improvement programs, and more.
- We distribute a quarterly HR newsletter to all employees.
- Biometric Health Screenings were completed at 1/3 of school sites for 2021-2022.
- Starting in 2024, wellness exam requirement will be tied to employee health benefit options.

Sarasota County Schools Strategic Plan Stocktake:

March 2022

	<ul style="list-style-type: none">• Barancik Foundation has agreed to provide funds to offer Employee Resource Groups (ERG) districtwide and to build a wellness space for employees at Tuttle Elementary as a pilot program. We continue to collaborate with community partners to explore opportunities to expand programming.
Perceived Challenges	<ul style="list-style-type: none">• The competitive job market leads to challenges in creating competitive salary schedules. We need to continue to analyze our salary schedules and fill rates for positions to adjust salaries for positions as needed to reflect the industry rates.• We are in the process of selecting a firm or consultant to complete a comprehensive district wide compensation study and analysis. Once that work is complete, we will need to revise how we handle the creation and revision of job descriptions and how we handle salary placement and movement across salary schedules in order to maintain the results of the salary study.• When we look at creating a competitive compensation and benefits plan, it is important to also consider the cost of living in Sarasota for our employees. The increasing housing expenses have added another challenge to filling our positions. We are very excited for the contribution by the Barancik Foundation to offer 15 units for teachers and 15 units for Hometown Heroes in the new affordable housing complex, Lofts on Lemon. We understand that affordable housing will continue to be a big challenge in recruiting and retaining staff. We are excited to work with the Barancik Foundation, Community Foundation, Gulf Coast Community Foundation, and others to begin exploring other community efforts to expand affordable housing in our community.• Employees can choose not to engage in activities related to their benefits.• With competing priorities, we continue to try to determine the best avenues to provide wellness opportunities to meet employee needs.
Immediate Next Steps	<ul style="list-style-type: none">• Analyze and adjust salary schedules to reflect an equitable and competitive salary structure for all positions.• Create a fiscally responsible compensation salary structure that is fair, equitable, and accessible online.• Implement a communication campaign to promote and educate applicants and employees about the district's compensation package and incentives.• Collaborate with key stakeholders to establish an intranet system to provide employees simple and easy access to all benefit, wellness, and incentive programs.• Continue to develop and deliver data driven wellness programs that enhance overall employee engagement, reduce turnover, and provide a fulfilling employee experience.



April 12, 2022 Board Meeting
Agenda Item 4.

Title

INCLUDED IN GOAL 3 DISCUSSION: TELADOC MENTAL HEALTH SERVICES

Description

Recommendation

Contact

PETERSON

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Teladoc	4/6/2022	Cover Memo

TELADOC

- Teladoc is current benefit to all members on the medical plan with Florida Blue
 - This benefit covers primary care visits on all plans
 - Co-pay is discounted by \$5 for each plan and a flat \$25 copay for the Low PPO
 - Provides a discounted office visit charge to the plan of \$42 vs. the average cost of \$119
- Currently exploring the addition of mental health visits coverage to Teladoc.
Considerations include:
 - Financial impact to the plan
 - high initial virtual mental health visit cost
 - Utilization benchmarking from other Florida Blue school districts
 - In-person versus virtual
 - Initial/ongoing



TELADOC

- Teladoc mental health program through Florida Blue is \$0.50 PEPM.
- As of January 2022, enrollment in the medical plan is about 5440 so administrative cost for adding mental health component to the plan is approximately \$32,640.
- Service costs for mental health for current Florida Blue contracts and Teladoc are as follows:

		CY 2021 FL Blue	Teladoc
Therapist/Psychologist	In-Network	\$73	\$90
	Out-of-Network	\$81	
Psychiatrist	In-Network	\$91	\$220 Initial / \$100 Ongoing
	Out-of-Network	\$100	



TELADOC

- Aon performed a cost estimate for adding Teladoc services to the medical plan.
- Aon looked at a report from Florida Blue for calendar year 2021 with the mental health service counts and costs split between in and out-of-network for psychiatrist, licensed therapist and psychologist. Aon used this report to compare services costs between Florida Blue and Teladoc, as well as an estimate that the utilization will shift to Teladoc.
- In the marketplace, Aon does see high out-of-network utilization for mental health providers, but Sarasota's services utilization was mostly in network as seen below:

	IN	OON
Therapist/Psychologist	92%	8%
Psychiatrist	97%	3%



TELADOC

Estimated additional costs to SBSC for each scenario, including the annual program cost of \$32,640:

- **Best Estimate:** **\$228,000**
- Low Cost Scenario: \$ 89,000
- High Cost Scenario: \$371,000

The above cost estimates assume that members will have **no cost share** for Teladoc mental health services, consistent with the current plan design for in-network mental health services. If the current physician Teladoc copays are applied to these mental health Teladoc services (which range from \$15-\$25), the resulting estimated additional cost to SBSC would be reduced to:

- **Best Estimate:** **\$182,000**
- Low Cost Scenario: \$ 71,000
- High Cost Scenario: \$263,000





April 12, 2022 Board Meeting
Agenda Item 5.

Title

OPERATING BUDGET

Description

Recommendation

Contact

CORCORAN & CURTNER

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Budget Documents	4/5/2022	Cover Memo

General Fund Revenues/Appropriations

	A	B	C	P	Q	R	S	T	U	V	W	X	Y
1						Adopted		Amended		Projected		Variance	
2				Actuals		Budget		Budget		Actuals		Actuals v. Amended	
3				2020-2021		2021-2022		2021-2022		2021-2022		2021-2022	
4		Estimated Revenues											
5		Federal Sources											
6		ROTC/PELL/SEOG		\$ 450,020		\$ 392,101		\$ 392,101		\$ 392,101		\$ -	
7		Medicaid Reimbursement		2,058,870		1,457,780		1,457,780		1,457,780		-	
9		Total Federal Sources		2,544,890		1,849,881		1,849,881		1,849,881		-	
10													
48		State Sources											
49		Florida Education Finance Program (FEFP)		(7,992,924)		(8,232,037)		(1,097,561)		(1,097,561)		-	
50		Scholarships (McKay, Gardiner, Empowerment)		(5,856,547)		(7,687,962)		(13,216,835)		(13,216,835)		-	
51		FEFP Instructional Materials		3,624,587		3,600,697		3,772,107		3,772,107		-	
52		FEFP Transportation		6,945,853		7,090,818		7,836,171		7,836,171		-	
53		FEFP Safe Schools		2,754,631		2,789,417		2,817,708		2,817,708		-	
54		FEFP Supplemental Academic Instruction		8,770,234		8,835,618		9,061,801		9,061,801		-	
55		FEFP Reading Instruction		2,018,530		2,009,189		2,040,033		2,040,033		-	
56		FEFP Teacher Lead Program		838,149		831,458		831,458		831,458		-	
57		FEFP Digital Classrooms		110,910		110,750		110,932		110,932		-	
58		FEFP Teacher Salary Increase Allocation		7,852,311		8,575,226		8,575,226		8,575,226		-	
59		FEFP Mental Health Assistance Allocation		1,544,780		1,797,011		1,828,185		1,828,185		-	
60		Class Size Reduction		49,186,425		44,869,228		45,607,623		45,607,623		-	
62		Workforce Development (GAA)		8,393,009		8,414,899		8,417,099		8,417,099		-	
63		CO & DS Withheld for Bonds/Admin		26,986		26,986		26,986		26,986		-	
64		Race Track Funds		446,500		446,500		446,500		446,500		-	
65		State License Tax		248,842		243,160		243,160		243,160		-	
66		Other Miscellaneous State Revenue		95,628		58,568		853,158		853,158		-	
69		Total State Sources		79,007,904		73,779,526		78,153,751		78,153,751		-	
70													
71		Local Sources											
72		Local Ad Valorem Taxes (Required Local Effort & District School Tax Discretionary)		\$ 298,588,971		\$ 301,391,672		\$ 301,391,672		\$ 301,391,672		\$ -	
73		Local Voted Referendum		66,561,624		71,606,480		71,606,480		71,606,480		-	
74		Course Fees		2,236,390		1,690,000		1,711,140		1,711,140		-	
75		Rental		192,587		388,676		388,676		388,676		-	
76		Interest		594,065		259,620		259,620		259,620		-	
77		Food Service Indirect Cost		396,845		400,000		400,000		400,000		-	
78		Childcare Fees - School Age		1,934,242		1,729,036		1,895,886		1,895,886		-	
79		Federal Indirect Cost		662,819		468,983		1,308,983		1,308,983		-	
80		Miscellaneous Local Revenue		4,666,123		2,172,768		2,837,263		2,837,263		-	
81		Total Local Sources		375,833,666		380,107,235		381,799,720		381,799,720		-	
82													
83		Total Revenues		457,386,460		455,736,642		461,803,352		461,803,352		-	

General Fund Revenues/Appropriations

	A	B	C	P	Q	R	S	T	U	V	W	X	Y
1						Adopted		Amended		Projected		Variance	
2				Actuals		Budget		Budget		Actuals		Actuals v. Amended	
3				2020-2021		2021-2022		2021-2022		2021-2022		2021-2022	
84													
85		Other Financing Sources											
86		Loss Recoveries		173,962		-		-		-		-	
87		Transfer from Grants		529,122		7,806,432		7,394,905		7,394,905		-	
88		Transfer from Capital		26,492,222		31,838,915		33,125,131		33,125,131		-	
89		Total Other Financing Sources		27,195,306		39,645,347		40,520,036		40,520,036		-	
90													
91		Total Revenues and Other Financing Sources (Net)		484,581,766		495,381,989		502,323,388		502,323,388		-	
92													
93		Beginning Fund Balance		86,844,175		95,648,801		95,648,801		95,648,801		-	
94													
95		Total Funds Available		\$ 571,425,941		\$ 591,030,790		\$ 597,972,189		\$ 597,972,189		\$ -	
96													

General Fund Revenues/Appropriations

	A	B	C	P	Q	R	S	T	U	V	W	X	Y
1						Adopted		Amended		Projected		Variance	
2				Actuals		Budget		Budget		Actuals		Actuals v. Amended	
3				2020-2021		2021-2022		2021-2022		2021-2022		2021-2022	
97		Appropriations											
98		Appropriations by Object											
99		Salaries		\$ 268,795,405		\$ 288,900,276		\$ 295,095,993		\$ 294,811,618		\$ (284,375)	
100		Benefits		91,332,985		103,013,552		102,165,013		101,848,620		(316,393)	
101		Purchased Services District		28,570,289		35,226,738		34,177,089		33,287,826		(889,263)	
102		Purchased Services Charter		55,167,334		60,117,902		57,076,059		57,062,255		(13,804)	
103		Energy Services		9,543,960		10,780,114		11,052,513		11,041,124		(11,389)	
104		Materials and Supplies		15,907,430		13,806,516		11,813,133		10,915,508		(897,625)	
105		Capital Outlay		1,117,519		2,218,924		2,118,962		1,522,889		(596,073)	
106		Other Expenses		5,342,218		6,702,128		7,267,388		6,559,872		(707,516)	
107		Total Appropriations		475,777,140		520,766,150		520,766,150		517,049,712		(3,716,438)	
108													
115		Total Appropriations and Transfers Out		\$ 475,777,140		\$ 520,766,150		\$ 520,766,150		\$ 517,049,712		\$ (3,716,438)	
116													
117		Ending Fund Balance		\$ 95,648,801		\$ 70,264,640		\$ 77,206,039		\$ 80,922,477		\$ 3,716,438	
118													
119		Composition of Ending Fund Balance											
120		Nonspendable Fund Balance		\$ 11,045,142		\$ 11,045,142		\$ 11,045,142		\$ 11,045,142		\$ -	
121		Restricted Fund Balance		9,003,244		9,003,244		9,003,244		9,003,244		-	
122		Assigned Fund Balance		6,546,514		6,546,514		6,546,514		6,546,514		-	
123		Unassigned Fund Balance		69,053,901		43,669,740		50,611,139		54,327,577		3,716,438	
124		TOTAL RESERVES AND FUND BALANCE		\$ 95,648,801		\$ 70,264,640		\$ 77,206,039		\$ 80,922,477		\$ 3,716,438	
125								-		-			
126		TOTAL EXPENDITURES, TRANSFERS AND FUND BALANCE		\$ 571,425,941		\$ 591,030,790		\$ 597,972,189		\$ 597,972,189		\$ -	
127													
128		Surplus (Deficit) of Revenues and Transfers over Appropriations/Expenditures		\$ 8,804,626		\$ (25,384,161)		\$ (18,442,762)		\$ (14,726,324)		\$ 3,716,438	
129													
130		Financial Condition		16.53%		11.02%		12.38%		13.18%		0.80%	
131													

General Fund Revenues/Appropriations

	A	B	C	P	Q	R	S	T	U	V	W	X	Y
1						Adopted		Amended		Projected		Variance	
2				Actuals		Budget		Budget		Actuals		Actuals v. Amended	
3				2020-2021		2021-2022		2021-2022		2021-2022		2021-2022	
132		Appropriations											
133		Appropriations by Function											
134		Instruction		\$ 303,713,635		\$ 336,254,876		\$ 328,858,459		\$ 328,739,374		\$ (119,085)	
135		Pupil Personnel Services		27,465,486		29,073,639		30,560,234		\$ 30,545,081		(15,153)	
136		Instructional Media Services		9,342,189		6,435,255		6,514,969		\$ 5,917,845		(597,124)	
137		Instruction and Curriculum Development Services		3,462,388		3,763,948		3,776,913		\$ 3,768,164		(8,749)	
138		Instructional Staff Training Services		1,376,838		1,636,796		1,835,618		\$ 1,548,995		(286,623)	
139		Instruction-Related Technology		5,554,509		4,836,874		5,538,738		\$ 5,490,179		(48,559)	
140		Board of Education		944,028		1,634,555		1,607,908		\$ 1,388,077		(219,831)	
141		Legal Services		1,060,011		1,037,828		1,287,400		\$ 1,274,421		(12,979)	
142		General Administration		2,062,792		2,315,871		2,393,052		\$ 2,334,916		(58,136)	
143		School Administration		21,798,739		22,687,808		24,719,075		\$ 24,704,715		(14,360)	
144		Facilities Acquisition and Construction		3,421,417		3,827,150		3,932,544		\$ 3,736,044		(196,500)	
145		Fiscal Services		2,352,537		2,829,811		2,828,810		\$ 2,589,990		(238,820)	
146		Food Services		57,038		38,386		6,914		\$ 3,313		(3,601)	
147		Central Services		7,339,590		8,115,252		8,629,201		\$ 7,964,579		(664,622)	
148		Pupil Transportation		15,931,660		19,612,716		19,619,243		\$ 18,738,226		(881,017)	
149		Operation of Plant		44,869,085		48,545,605		49,440,492		\$ 49,409,403		(31,089)	
150		Maintenance of Plant		19,139,359		21,449,971		22,283,589		\$ 22,003,243		(280,346)	
151		Administrative Technology Services		3,185,385		3,326,851		3,395,374		\$ 3,360,222		(35,152)	
152		Community Services		2,700,454		3,342,958		3,537,617		\$ 3,532,925		(4,692)	
153		Total Appropriations		475,777,140		520,766,150		520,766,150		517,049,712		(3,716,438)	
154													
162		Total Appropriations and Transfers Out		\$ 475,777,140		\$ 520,766,150		\$ 520,766,150		\$ 517,049,712		\$ (3,716,438)	
163													
164		Ending Fund Balance		\$ 95,648,801		\$ 70,264,640		\$ 77,206,039		\$ 80,922,477		\$ 3,716,438	
165													
166		Composition of Ending Fund Balance											
167		Nonspendable Fund Balance		\$ 11,045,142		\$ 11,045,142		\$ 11,045,142		\$ 11,045,142		\$ -	
168		Restricted Fund Balance		9,003,244		9,003,244		9,003,244		9,003,244		-	
170		Assigned Fund Balance		6,546,514		6,546,514		6,546,514		6,546,514		-	
175		Unassigned Fund Balance		69,053,901		43,669,740		50,611,139		54,327,577		3,716,438	
176		TOTAL RESERVES AND FUND BALANCE		\$ 95,648,801		\$ 70,264,640		\$ 77,206,039		\$ 80,922,477		\$ 3,716,438	
177													
178		TOTAL EXPENDITURES, TRANSFERS AND FUND BALANCE		\$ 571,425,941		\$ 591,030,790		\$ 597,972,189		\$ 597,972,189		\$ -	
179													
180		Surplus (Deficit) of Revenues and Transfers over Appropriations/Expenditures		8,804,626		(25,384,161)		(18,442,762)		(14,726,324)		3,716,438	
181													
182		Ending Financial Condition Ratio (per F.S. 1011.051)		16.53%		11.02%		12.38%		13.18%		0.80%	

The School Board of Sarasota County, Florida
General Fund
Budget Amendment Number Two
Fiscal Year 2021-2022 (School Board Pending Approval 04/19/2022)

Account Definition	2021-2022 Adopted Budget	2021-2022 Current Budget	Increase	Decrease	2021-2022 Amended Budget
Estimated Revenues					
Federal	1,849,881	1,849,881	-	-	1,849,881
State	73,779,526	73,779,526	4,374,225	-	78,153,751
Local	380,107,235	380,107,235	1,692,485	-	381,799,720
Total Estimated Revenue	455,736,642	455,736,642	6,066,710	-	461,803,352
Net Increase (Decrease) In Estimated Revenues			6,066,710		
Estimated Appropriations (Summary by Object)					
Salaries	288,900,276	288,900,276	6,195,717	-	295,095,993
Employee Benefits	103,013,552	103,013,552	-	848,539	102,165,013
Purchased Services	95,344,640	95,344,640	-	4,091,492	91,253,148
Energy Services	10,780,114	10,780,114	272,399	-	11,052,513
Materials and Supplies	13,806,516	13,806,516	-	1,993,383	11,813,133
Capital Outlay	2,218,924	2,218,924	-	99,962	2,118,962
Other Expenses	6,702,128	6,702,128	565,260	-	7,267,388
Total Estimated Appropriations by Object	520,766,150	520,766,150	7,033,376	7,033,376	520,766,150
Net Increase (Decrease) In Estimated Appropriations by Object			-		
Estimated Appropriations (Summary by Function)					
Instructional Services	336,254,876	336,254,876	-	7,396,417	328,858,459
Pupil Personnel Services	29,073,639	29,073,639	1,486,595	-	30,560,234
Instructional Media Services	6,435,255	6,435,255	79,714	-	6,514,969
Instruction and Curriculum Development Services	3,763,948	3,763,948	12,965	-	3,776,913
Instructional Staff Training	1,636,796	1,636,796	198,822	-	1,835,618
Instructional Related Technology	4,836,874	4,836,874	701,864	-	5,538,738
Board of Education	1,634,555	1,634,555	-	26,647	1,607,908
Legal Services	1,037,828	1,037,828	249,572	-	1,287,400
General Administration	2,315,871	2,315,871	77,181	-	2,393,052
School Administration	22,687,808	22,687,808	2,031,267	-	24,719,075
Facilities Acquisition and Construction	3,827,150	3,827,150	105,394	-	3,932,544
Fiscal Services	2,829,811	2,829,811	-	1,001	2,828,810
Food Services	38,386	38,386	-	31,472	6,914
Central Services	8,115,252	8,115,252	513,949	-	8,629,201
Pupil Transportation Services	19,612,716	19,612,716	6,527	-	19,619,243
Operation of Plant	48,545,605	48,545,605	894,887	-	49,440,492
Maintenance of Plant	21,449,971	21,449,971	833,618	-	22,283,589
Administrative Technology Services	3,326,851	3,326,851	68,523	-	3,395,374
Community Services	3,342,958	3,342,958	194,659	-	3,537,617
Total Estimated Appropriations by Function	520,766,150	520,766,150	7,455,537	7,455,537	520,766,150
Net Increase (Decrease) In Estimated Appropriations by Function			-		
Other Financing Sources (Uses)					
Transfers In Public Education Capital Outlay	3,654,321	3,654,321	331,408	-	3,985,729
Transfers In Millage Fund	28,184,594	28,184,594	954,808	-	29,139,402
Transfers from Grants	7,806,432	7,806,432	-	411,527	7,394,905
Total Other Financing Sources and Uses	39,645,347	39,645,347	874,689	-	40,520,036
Excess (Deficiency) of Revenues over Appropriations and Other Uses	(25,384,161)	(25,384,161)	6,941,399	-	(18,442,762)
Fund Balance					
Beginning Gross Fund Balance	95,648,801	95,648,801	-	-	95,648,801
Ending Gross Fund Balance	70,264,640	70,264,640	6,941,399	-	77,206,039

General Fund Budget Amendment Two

The General Fund Budget Amendment Number Two is amending the budget based upon the actual results of operations through March 31, 2022. Overall, State revenues are increasing by approximately \$4.37M. The Third Calculation of the FEFP received in January 2022, showed unweighted FTE increased by 1,477 to 44,707, however the total funds per unweighted FTE decreased by \$84.70. While state and local FEFP increased by \$8.2M, McKay and Florida Family Empowerment Scholarships adjusted that increase to approximately \$2.84M. Class size reduction funding increased by \$738,395. A Reading Initiative Pilot grant in the amount of \$704K, and a DCF Behavioral Health Network grant in the amount of \$40K also increased state revenues. Overall, Local revenues are increasing by approximately \$1.7M. The primary driver of this increase is substantially higher federal indirect costs that can be charged to the ESSER II grant for allowable administrative fees, of approximately \$840K. Childcare fees are trending slightly higher than budgeted. Also included in local revenues is an increase of approximately \$395K due to the sale of surplus property, that was not forecasted in the adopted budget. Capital transfers have increased due to an increase in eligible capital expenditures and repairs and maintenance, and the receipt of a Safety and Security grant. Projected year end appropriations for 2021-22 will be within the Adopted Budget of \$520,766,150. Budget by object and function has been amended primarily to accommodate the mid-year raise, retroactive to July 1, 2021, that was approved by the Board in February 2022. Purchased services has decreased primarily due to reduced enrollment in Charter school FTE, a \$3M savings in Charter school payments. Energy services are increasing slightly, with the expectation that our new contract with Cenergistics will offset any future increases. A decrease in materials and supplies can be attributed to projected spending by schools and departments that did not occur. Increases in Other Expenses are primarily attributed to IB, AP, and AICE testing supplies.

	A	Z	AG	AH	AI
1	Comparison of FEFP School Funding:				
2	(Formula Funding does not include Workforce Development)				
3		2021-2022	2021-2022	2021-2022	VARIANCE
4		Conference Report	2nd Calculation	3rd Calculation	3rd Calc vs.
5		4/27/2021	7/16/2021	1/25/2022	2nd Calc
6	MAJOR FEFP FORMULA COMPONENTS				
7	Unweighted FTE	43,229.91	43,229.91	44,707.01	1,477
8	Weighted FTE (Funded)	48,819.16	48,819.16	50,303.06	1,484
9	School Taxable Value	\$ 72,344,240,198	\$ 74,590,082,549	\$ 74,590,082,549	-
10					-
11	Required Local Effort Millage	3.711	3.447	3.447	-
12	Discretionary Millage	0.748	0.748	0.748	-
13					-
14	Total Millage	4.459	4.195	4.195	-
15					-
16	Base Student Allocation	\$ 4,372.91	\$ 4,372.91	\$ 4,372.91	-
17					-
18	FEFP DETAIL				
19	WFTE x BSA x DCD(1.0068-2021/1.0110-2022)	\$ 215,830,093	\$ 215,830,093	\$ 222,390,432	6,560,339
20	Teacher Salary Increase Allocation / Best and				
21	Brightest	8,575,226	8,575,226	8,575,226	-
22	Safe Schools	2,729,820	2,789,417	2,817,708	28,291
23	Supplemental Academic Instruction	8,835,618	8,835,618	9,061,801	226,183
24	Reading Instruction Allocation	2,009,189	2,009,189	2,040,033	30,844
25	ESE Guaranteed Allocation	22,765,404	22,765,404	23,180,193	414,789
26	Digital Classrooms Allocation/Distance Learning	110,750	110,750	110,932	182
27	Mental Health Assistance	1,797,011	1,797,011	1,828,185	31,174
28	Teacher Lead Allocation	831,458	831,458	831,458	-
29	Student Transportation	7,090,818	7,090,818	7,836,171	745,353
30	Instructional Materials	3,600,697	3,600,697	3,772,107	171,410
31					-
32	TOTAL STATE AND LOCAL FEFP	274,176,084	274,235,681	282,444,246	8,208,565
33					-
34	LOCAL FEFP FUNDS				
35	Required Local Effort Taxes	246,757,522	246,827,534	246,827,534	-
36		90.00%	90.01%	87.39%	(0)
37					
38	STATE FEFP FUNDS				
39		27,418,562	27,408,147	35,616,712	8,208,565
40	Prior Year Adjustment			137,889	137,889
41	Funding Adjustment				-
42	Proration to Funds Available			(2,920,466)	(2,920,466)
43	Student Reserve Allocation			2,920,466	2,920,466
44	Net State FEFP	27,418,562	27,408,147	35,754,601	8,346,454
45		10.00%	9.99%	12.61%	0
46					
47	NET STATE FEFP FUNDS				
48		27,418,562	27,408,147	35,754,601	8,346,454
49	Adjustment for Florida Family Empowerment	(2,573,484)	(2,573,484)	(8,848,097)	(6,274,613)
50	Adjustment for McKay Scholarships	(3,283,063)	(3,278,692)	(4,368,738)	(1,090,046)
51	Prior Year Adjustments for Scholarship Deductions	-		21,459	21,459
52	ADJUSTED NET STATE FEFP FUNDS	21,562,015	21,555,971	22,559,225	1,003,254
53					-
54	STATE CATEGORICAL PROGRAMS				
55	School Recognition				-
56	Class Size Reduction	44,869,228	44,869,228	45,607,623	738,395
57	Total State Categorical Programs	44,869,228	44,869,228	45,607,623	738,395
58					-
59	TOTAL STATE FUNDING (not adj for scholarships)	72,287,790	72,277,375	81,224,335	8,946,960
60					-
61	LOCAL FUNDING				
62	Total Required Local Effort	246,757,522	246,827,534	246,827,534	-
63	.498/.748 Discretionary Local Effort	51,948,952	53,561,646	53,561,646	-
64					-
65	TOTAL LOCAL FUNDING	298,706,474	300,389,180	300,389,180	-
66					-
67	TOTAL FUNDING	\$ 370,994,264	\$ 372,666,555	\$ 381,613,515	8,946,960
68					
69	TOTAL ADJUSTED FUNDING (to budget in GF)	\$ 365,137,717	\$ 366,814,379	\$ 368,556,028	1,741,649
70					-
71	TOTAL FUNDS PER UNWEIGHTED FTE	\$ 8,581.89	\$ 8,620.57	\$ 8,535.88	(84.70)
72	Change in Funds per unweighted FTE from Last	\$ 72.95	\$ 38.68	\$ (84.70)	(123.38)



April 12, 2022 Board Meeting
Agenda Item 6.

Title

IMPACT FEE STUDY

Description

Recommendation

Contact

DUMAS

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Impact Fee Study	4/5/2022	Cover Memo
Presentation	4/8/2022	Cover Memo



Educational System Impact Fee Study

Prepared for:
School District of Sarasota County

April 4, 2022



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EXECUTIVE SUMMARY

The School District of Sarasota County retained TischlerBise, Inc., to prepare an update to its Educational System Impact Fee Program. Impact fees are one-time payments used to construct system improvements needed to accommodate new development. An impact fee represents new growth's proportionate share of capital facility needs. Impact fees do have limitations, and should not be regarded as the total solution for infrastructure funding needs. Rather, they are one component of a comprehensive portfolio to ensure provision of adequate public facilities needed to serve new development. In contrast to general taxes, impact fees may not be used for operations, maintenance, replacement of infrastructure, or correcting existing deficiencies.

SCHOOL DISTRICT OF SARASOTA IMPACT FEE OVERVIEW

The School District's last impact fee study was prepared by Tindale Oliver in October of 2015. The School District has seen significant residential growth over the past several years and with it increased enrollment. This growth is expected to continue in the future.

The School District of Sarasota County Educational System Impact Fees are derived using the incremental expansion approach. This approach determines current level-of-service standards for school buildings (i.e., elementary, middle, and high), land for school sites, and buses. Level-of-service standards are derived using 2021-2022 permanent capacity and enrollment data and are expressed as follows:

1. School buildings: Square feet per student by type of school
2. Land: Acres per student by type of school
3. Buses: Buses per student

Credits are included in the Educational System Impact Fee to account for outstanding principal on existing Certificates of Participation issued for school construction projects that added capacity (student seats) and other revenues planned in the future to fund school expansion projects. Further detail on the approach, levels of service, costs, and credits is provided in the body of this report.

GENERAL LEGAL FRAMEWORK

This section discusses the authority under which impact fees are imposed in Florida, but is not exhaustive of every aspect of the body of law now related to impact fees. **In addition, TischlerBise has documented in bold type how this analysis ensures the "dual rational nexus" discussed in this section is met.** The authority for Florida counties to adopt and collect impact fees to offset the demands new development creates for new infrastructure is well established. *St. Johns County v. Northeast Florida Builders Association* (583 So. 2d 635, 638 Fla. 1991) states, "The use of impact fees has become an accepted

method of paying for public improvements that must be constructed to serve new growth.”¹ State statutes specifically “encourage the use of innovative land development regulations which include provisions such as ... impact fees,” and Florida courts have upheld local government’s authority to adopt fees under general home rule and police power theories.²

In 2006, the Florida legislature passed the “Florida Impact Fee Act,” which recognized impact fees as “an outgrowth of the home rule power of a local government to provide certain services within its jurisdiction.” § 163.31801(2), Fla. Stat. The statute – concerned mostly with procedural and methodological limitations – did not expressly allow or disallow any particular public facility type from being funded with impact fees. The Act did specify procedural and methodological prerequisites, most of which were common to the practice already. Subsequent amendments to the Act, in 2009, removed prior notice requirements for impact fee reductions (but not increases) and purported to elevate the standard of judicial review.³

In the most recent amendments to the Florida Impact Fee Act, House Bill 750 (2021) specified that impact fees can only be used for fixed capital expenditures, revised requirements for crediting contributions against the collection of impact fees, and restricted impact fee increases. Among the increase restrictions, an adopted increase of 25 percent or less must be phased over two years; increases between 25-50

¹ Citing *Home Builders & Contractors Ass’n. v. Palm Beach Cty.*, 446 So.2d 140 (Fla. 4th DCA 1984); *Hollywood, Inc. v. Broward County*, 431 So.2d 606 (Fla. 4th DCA 1983).

² See §163.3202(3), Fla. Stat.; see also *Home Builders & Contractors Ass’n.*, 446 So.2d 140.

³ The “Florida Impact Fee Act” currently reads as follows:

163.31801 Impact fees; short title; intent; definitions; ordinances levying impact fees.

(1) This section may be cited as the “Florida Impact Fee Act.”

(2) The Legislature finds that impact fees are an important source of revenue for a local government to use in funding the infrastructure necessitated by new growth. The Legislature further finds that impact fees are an outgrowth of the home rule power of a local government to provide certain services within its jurisdiction. Due to the growth of impact fee collections and local governments’ reliance on impact fees, it is the intent of the Legislature to ensure that, when a county or municipality adopts an impact fee by ordinance or a special district adopts an impact fee by resolution, the governing authority complies with this section.

(3) An impact fee adopted by ordinance of a county or municipality or by resolution of a special district must, at minimum:

(a) Require that the calculation of the impact fee be based on the most recent and localized data.

(b) Provide for accounting and reporting of impact fee collections and expenditures. If a local governmental entity imposes an impact fee to address its infrastructure needs, the entity shall account for the revenues and expenditures of such impact fee in a separate accounting fund.

(c) Limit administrative charges for the collection of impact fees to actual costs.

(d) Require that notice be provided no less than 90 days before the effective date of an ordinance or resolution imposing a new or increased impact fee. A county or municipality is not required to wait 90 days to decrease, suspend, or eliminate an impact fee.

(4) Audits of financial statements of local governmental entities and district school boards which are performed by a certified public accountant pursuant to s. 218.39 and submitted to the Auditor General must include an affidavit signed by the chief financial officer of the local governmental entity or district school board stating that the local governmental entity or district school board has complied with this section.

(5) In any action challenging an impact fee, the government has the burden of proving by a preponderance of the evidence that the imposition or amount of the fee meets the requirements of state legal precedent or this section. The court may not use a deferential standard.

percent must be phased over four years; no increase can exceed 50 percent; and impact fees cannot be increased more than once every four years. The restrictions can be bypassed if the jurisdiction complies with the impact fee rational nexus test; and the jurisdiction hold two publicly noticed workshops dedicated to the need to exceed the limitations; and the increase is approved by no less than two-thirds vote of the governing body.

Under Florida law, impact fees must comply with the “dual rational nexus” test, which requires “a reasonable connection, or rational nexus, between the need for additional capital facilities and the growth in service units generated by new development. In addition, the government must show a reasonable connection, or rational nexus, between the expenditures of the funds collected and the benefits accruing to the subdivision,” St. Johns County, 583 So.2d at 637 (quoting Hollywood, Inc. 431 So. 2d at 611-12). Impact fee calculation studies, generally speaking, establish the pro rata, or proportionate, “need” for new infrastructure and implementing ordinances to ensure that new growth paying the fees receive a pro rata “benefit” from their expenditure.

The School District of Sarasota County is updating its impact fees in order to fund capital facilities needed to meet the demand created by new growth in the County. **As documented in this report, it is anticipated that new residential development will generate 1,213 additional elementary students, 151 middle school students, and 700 high school students, or a total of 2,064 additional students over the next ten years.** The need for these services, and the infrastructure necessary to provide them, is driven by residential development; therefore, as vacant lands within Sarasota County convert to residential uses, or as existing uses expand, the demand imposed upon the School District for additional capital facilities increases proportionately.

The need for additional capacity for new development is further shown through the School District’s existing work plan. Hollywood, Inc., 431 So.2d at 611 (holding that a plan for providing facilities at a reasonable level of service demonstrates “a reasonable connection between the need for additional park facilities and the growth in population”). Capital facilities necessary to provide this infrastructure have been provided by the School District to date; however, as new development occurs, the School District will need to provide new residents with the same levels of services and facilities. The expenditures required to maintain levels of service are not necessitated by existing residents, but rather by new growth. **As documented in this report, the School District has four school construction projects and land purchases planned that will provide capacity for future students.**

Furthermore, through the implementation of the School District’s work plan, new development paying impact fees will receive a pro rata benefit from new facilities built with those fees. **While excess capacity may exist today systemwide at the elementary, middle, and high school levels, capacity needs at individual schools are not concentrated in specific areas of the County, but exist in all areas of the County. As a result, the School District’s planned and anticipated growth-related capital expansions over the next ten years will not be limited to certain areas of the County, and will therefore benefit all fee payers as additional student seats are constructed and attendance zones are redrawn in order to reflect the construction of additional school capacity and to balance capacity and enrollment.** In

addition, the County's Impact Fee Ordinance, including any amendments necessary to implement the fees recommended in this study, earmarks Educational System Impact Fees solely for the purpose of providing growth necessitated capital improvements and additions to educational plants and ancillary plants of the County educational system.

Finally, there are several steps the School District will take to ensure ongoing compliance with applicable Florida laws related to impact fees. It will continue to update and implement plans for expending impact fee revenues on the types of facilities TischlerBise has used to develop the fees in this study. In Florida, this typically is done through the Capital Improvement Plan (CIP) and Capital Improvements Element (CIE) framework.

CONCEPTUAL IMPACT FEE CALCULATION

In contrast to project-level improvements, impact fees fund growth-related infrastructure that will benefit multiple development projects, or the entire jurisdiction (referred to as system improvements). The first step is to determine an appropriate demand indicator for the particular type of infrastructure. The demand indicator measures the number of demand units for each unit of development. For example, an appropriate indicator of the demand for schools is population growth, and the increase in population can be estimated from the average number of students per housing unit. The second step in the impact fee formula is to determine infrastructure units per demand unit, typically called level-of-service (LOS) standards. In keeping with the school example, a common LOS standard is square footage per student. The third step in the impact fee formula is the cost of various infrastructure units. To complete the school example, this part of the formula would establish the cost per square foot for school facility construction.

GENERAL METHODOLOGIES

There are three general methods for calculating impact fees. The choice of a particular method depends primarily on the timing of infrastructure construction (past, concurrent, or future) and service characteristics of the facility type being addressed. Each method has advantages and disadvantages in a particular situation, and can be used simultaneously for different cost components.

Reduced to its simplest terms, the process of calculating impact fees involves two main steps: (1) determining the cost of development-related capital improvements and (2) allocating those costs equitably to various types of development. In practice, though, the calculation of impact fees can become quite complicated because of the many variables involved in defining the relationship between development and the need for facilities within the designated service area. The following paragraphs discuss three basic methods for calculating impact fees and how those methods can be applied.

Cost Recovery (Past Improvements)

The rationale for recoupment, often called cost recovery, is that new development is paying for its share of the useful life and remaining capacity of facilities already built, or land already purchased, from which

new growth will benefit. This methodology is often used for utility systems that must provide adequate capacity before new development can take place.

Incremental Expansion (Concurrent Improvements)

The incremental expansion method documents current level-of-service (LOS) standards for each type of public facility, using both quantitative and qualitative measures. This approach ensures that there are no existing infrastructure deficiencies or surplus capacity in infrastructure. New development is only paying its proportionate share for growth-related infrastructure. Revenue will be used to expand or provide additional facilities, as needed, to accommodate new development. An incremental expansion cost method is best suited for public facilities that will be expanded in regular increment to keep pace with development, and is the methodology used for all components of this Educational System Impact Fee calculation.

Plan-Based Fee (Future Improvements)

The plan-based method allocates costs for a specified set of improvements to a specified amount of development. Improvements are typically identified in a long-range facility plan and development potential is identified by a land use plan. There are two options for determining the cost per demand unit: (1) total cost of a public facility can be divided by total demand units (average cost), or (2) the growth-share of the public facility cost can be divided by the net increase in demand units over the planning timeframe (marginal cost).

Credits

Regardless of the methodology, a consideration of “credits” is integral to the development of a legally defensible impact fee methodology. There are two types of “credits” with specific characteristics, both of which should be addressed in development impact fee studies and ordinances.

- First, a revenue credit might be necessary if there is a double payment situation and other revenues are contributing to the capital costs of infrastructure to be funded by impact fees. This type of credit is integrated into the impact fee calculation, thus reducing the fee amount.
- Second, a site-specific credit or developer reimbursement might be necessary for dedication of land or construction of system improvements funded by impact fees. This type of credit is addressed in the administration and implementation of the impact fee program.

A note on rounding: Calculations throughout this report are based on an analysis conducted using Excel software. Most results are discussed in the report using one, two, and three digit places, which represent rounded figures. However, the analysis itself uses figures carried to their ultimate decimal places; therefore, the sums and products generated in the analysis may not equal the sum or product if the reader replicates the calculation with the factors shown in the report (due to the rounding of figures shown, not in the analysis).

PROPOSED EDUCATIONAL SYSTEM IMPACT FEE SCHEDULE

As documented in this report, the School District of Sarasota County has complied with the Florida Development Impact Fee Act and applicable legal precedents. Educational System Impact Fees are proportionate and reasonably related to capital improvement demands of new development. Specific costs have been identified using local data and current dollars. With input from School District staff, TischlerBise determined demand indicators for each type of capital facility to allocate costs to new development. This report documents the formulas and input variables used to calculate the Educational System Impact Fees. The impact fee methodology also identifies the extent to which new development is entitled to various types of credits to avoid potential double payment of growth-related capital costs.

Figure 1 provides the proposed Educational System Impact Fees for Sarasota County. Educational System Impact Fees are applied only to residential development and are calculated per housing unit, reflecting the proportionate demand by type of unit. The amounts shown are “maximum supportable” amounts based on the methodologies, levels of service, and costs for the capital improvements identified herein. The fees represent the highest amount feasible for each type of residential unit, which represent new growth’s fair share of the capital costs as detailed in this report. The Board of County Commissioners can adopt, or the School Board recommend, amounts that are lower than the maximum amounts shown; however, a reduction in fee revenue will necessitate an increase in other revenues, a decrease in planned capital expenditures, and/or a decrease in the School District’s level of service.

Figure 1: Maximum Supportable Educational System Impact Fees

Maximum Supportable Education System Impact Fees				
	<i>Elementary (K-5)</i>	<i>Middle (6-8)</i>	<i>High (9-12)</i>	<i>Total</i>
Single Family	\$2,593	\$761	\$3,179	\$6,533
Multifamily (Apt/Condo/Townhouse)	\$960	\$249	\$984	\$2,193
Mobile Home / RV Park	\$263	\$81	\$248	\$592

In Figure 2, the results of the 2015 impact fee study are listed, the current fee amounts, and the results of this study. The results of this study are less than the 2015 study, however, the maximum supportable fee amounts from this study are greater than the current fees being charged. For a single family unit, the current fee is \$4,501 less than the results of this study.

Figure 2: History of Sarasota County School District Impact Fee Amounts

Housing Type	2015 Study Results [1]	Current Fee	2022 Maximum Supportable	Increase from Current Fee
Per Housing Unit				
Single Family	\$7,835	\$2,032	\$6,533	\$4,501
Multifamily	\$2,165	\$516	\$2,193	\$1,677
Mobile Home	\$722	\$188	\$592	\$404

[1] Tindale Oliver, 2015

STUDENT GENERATION RATES

Impact fees often use per capita standards and persons per housing unit to derive proportionate share fee amounts. A school impact fee study more accurately captures the demand on education facilities (i.e., schools and buses) when the analysis uses student generation rates. Housing types have varying number of students and, consequently, a varying demand on School Board infrastructure and services. Thus, it is important to differentiate between housing types. Three housing types have been included in this analysis: single family detached, multifamily (apt/condo/townhouse), and mobile home/RV park.

Note: the student generation analysis was completed with 2020-2021 school year data. The analysis was performed in 2021 and it is assumed that if generation rates have changed in the past year, it would be a marginal difference, having no impact on the analysis.

Student generation rates were calculated by utilizing geocoded student data from the School Board of Sarasota County and a Geographic Information System (GIS) database of property parcels provided by the Sarasota County Assessor's Office. No personal identifying information of students were made available. The calculations were conducted by overlaying both databases together and spatially joining them. This process creates a new GIS layer which includes the student and property information; thus, we are able to identify the housing type and grade level of each student.

There are three groups of students that were excluded from the student generation calculations: students attending charter schools, students that do not live in Sarasota County, and students that were spatially joined to a nonresidential development type. The charter student group is the largest (almost 5,000 students) and are not included since only public schools are funded with impact fees. There are nearly 2,200 students that do not live in the County but attend County schools. This group was not included in the analysis because only developments in Sarasota County can be charged an impact fee. Lastly, less than 300 students were not spatially joined to a housing unit. Based on the number of students compared to the total enrollment, it was determined that it would be time prohibitive to identify each of these students and join individually to a housing type. Overall, there were 37,558 students included in the analysis, compared to 245,205 housing units.

Finally, the housing type and grade level of the students are compared to calculate the student generation rates (SGR). Shown in Figure 3, the average SGR for a single family detached unit is 0.219 students; the average SGR for a multifamily unit is 0.075 students; and the average SGR for a mobile home is 0.021 students.

Figure 3: Total Student Generation Rate by Housing Type

Housing Type	Total Units [1]	Total Students [2]	Student Generation
Single Family (Detached)	140,655	30,782	0.219
Multifamily (Apt/Condo/Townhouse)	84,391	6,296	0.075
Mobile Home / RV Park	23,159	480	0.021
Total	248,205	37,558	0.151

[1] Source: Sarasota County Assessor's Office parcel GIS database

[2] Source: School Board of Sarasota County student geocoded database

Below, the SGR by housing type is calculated by the grade level. These rates will determine the different demand on elementary, middle, and high schools.

Figure 4: Student Generation Rate by Grade Level and Housing Type

Housing Type	ES SGR	MS SGR	HS SGR	Total SGR
Single Family (Detached)	0.103	0.042	0.073	0.219
Multifamily (Apt/Condo/Townhouse)	0.038	0.014	0.023	0.075
Mobile Home / RV Park	0.010	0.005	0.006	0.021

Source: Sarasota County Assessor's Office parcel GIS database; School Board of Sarasota County student geocoded database

Figure 5 below compares the student generation rates by housing type from the School District's current impact fee study (2015) to the student generation rates calculated for this update. As shown in Figure 5, the student generation rate for single family units have declined by 4% and the multifamily rate has increased by 19%. The mobile home rate remains the same.

Figure 5: Comparison of 2015 and 2022 Student Generation Rates

Housing Type	2015 SGR [1]	2022 SGR	SGR Change	Percent Change
Single Family (Detached)	0.228	0.219	(0.009)	-4%
Multifamily (Apt/Condo/Townhouse)	0.063	0.075	0.012	19%
Mobile Home / RV Park	0.021	0.021	0.000	0%

[1] Source: Tindale-Oliver Educational System Impact Fee Update Study, 2015

SUMMARY OF GROWTH INDICATORS

Demographic projections through school year 2031-2032 are summarized in Figure 6. Sarasota County is projected to grow by 14.5 percent over the next ten years, an increase of 63,824 residents. Housing development is assumed to grow at the same rate as population. As a result, over the next ten years, there will be an increase of 36,648 housing units.

Figure 6: Population and Housing Projections

Sarasota County, FL	Base Year 2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Increase
Population [1]	438,816	445,473	452,130	458,786	465,443	472,100	477,320	482,540	487,760	492,980	502,640	63,824
Annual Percent Increase		1.5%	1.5%	1.5%	1.5%	1.4%	1.1%	1.1%	1.1%	1.1%	2.0%	14.5%
Housing Type [2]												
Single Family	142,789	144,955	147,121	149,287	151,453	153,619	155,318	157,016	158,715	160,413	163,557	20,768
Multifamily	85,671	86,971	88,270	89,570	90,870	92,169	93,188	94,208	95,227	96,246	98,132	12,461
Mobile Home	23,510	23,867	24,224	24,580	24,937	25,294	25,573	25,853	26,133	26,412	26,930	3,419
Total	251,970	255,793	259,615	263,437	267,260	271,082	274,079	277,077	280,074	283,071	288,618	36,648

[1] Source: School Board of Sarasota County, 2021-2022 *Capital Improvement Plan*

[2] Housing units are assumed to grow at the same rate as the projected population

Student Enrollment Projections

Student enrollment is provided by District staff. Annual enrollment projections are provided through 2026. Enrollment estimates for the 2027-2031 school years are based on the annual average increase between 2015-2026, excluding 2020 because of the impact from the covid-19 pandemic. As a result, 1,213 elementary school students are projected, 151 middle school students, and 700 high school students; or an overall increase of 5.6 percent since the base year.

Figure 7: Projected Student Enrollment

Student Enrollment	Base Year 2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Increase
Elementary School	16,978	17,383	17,390	17,470	17,498	17,711	17,807	17,903	17,999	18,095	18,191	1,213
Middle School	7,470	7,379	7,227	7,326	7,408	7,469	7,499	7,530	7,560	7,591	7,621	151
High School	12,656	12,668	12,792	12,804	12,825	12,942	13,025	13,108	13,190	13,273	13,356	700
Total	37,104	37,430	37,409	37,599	37,731	38,122	38,331	38,540	38,750	38,959	39,168	2,064

Source: Enrollment projections through 2026 are based on analysis conducted by School District's Finance Department. The projections from 2027-2031 is based on the average enrollment changes from the previous five years and projected five years.

Permanent Capacity Utilization

The School District of Sarasota County's current permanent capacity is 44,224 student stations. By school type, permanent capacity is as follows: elementary school – 19,882; middle school – 11,219; and high school – 13,123. Based on the 2021-2022 enrollment, current permanent capacity utilization is 85% for elementary schools, 67% for middle schools, and 96% for high schools.

Figure 8: Current Enrollment and Permanent Capacity Comparison

School District of Sarasota County	21/22 October Enrollment	Permanent Capacity [1]	Available Capacity	Enrollment vs Capacity
Elementary School	16,978	19,882	2,904	85%
Middle School	7,470	11,219	3,749	67%
High School	12,656	13,123	467	96%
Total	37,104	44,224	7,120	84%

[1] Source: Florida Department of Education, Florida Inventory of School Houses (FISH)

As the School District's student enrollment increases, new development will demand additional school infrastructure. Figure 9 lists the projects in the School District's *Draft Capital Improvement Plan* that will increase the capacity and accommodate future demand. The capacity-increasing projects and land purchases total \$376.8 million.

Figure 9: Planned Capacity Increasing Projects and Land Purchases

Project	FY22-23	FY23-24	FY24-25	FY25-26	FY26-27	Total
Lakewood Ranch Elementary (new school)	\$0	\$0	\$0	\$0	\$40,000,000	\$40,000,000
Wellen Park High School (new school)	\$10,500,000	\$143,500,000	\$1,000,000	\$0	\$0	\$155,000,000
Wellen Park K-8 (new school)	\$0	\$80,000,000	\$1,000,000	\$0	\$0	\$81,000,000
Clark and Lorraine K-8 (new school)	\$81,000,000	\$0	\$0	\$0	\$0	\$81,000,000
School Site Purchases	\$0	\$7,960,000	\$0	\$0	\$11,850,000	\$19,810,000
TOTAL	\$91,500,000	\$231,460,000	\$2,000,000	\$0	\$51,850,000	\$376,810,000

Source: Sarasota County School District, *Draft 2022/2023 Capital Improvement Plan*

EDUCATIONAL SYSTEM IMPACT FEE

METHODOLOGY

The School District of Sarasota County Educational System Impact Fee methodology is based on current average public school student generation rates, level-of-service standards, and local costs. The Educational System Impact Fees use an incremental expansion approach, which documents the current level of service for public facilities in both quantitative and qualitative measures. The intent is to use impact fee revenue to provide growth necessitated capital improvements and additions to educational plants and ancillary plants of the County educational system, based on the current level of service and cost to provide capital improvements. All school levels are included in the fees. Costs for school buildings, land for school sites, and buses are included in the fee. Finally, credits for future principal payments on existing and future debt on Certificates of Participation issued to construction school capacity are included.

SERVICE AREA

The School District of Sarasota County provides the students of the County with a range of educational facilities. These facilities are located throughout the County and serve students located within the facility's attendance zone. As enrollment at individual facilities changes, attendance zones can be redrawn in order to better utilize District resources. Although each school has an attendance zone, students may utilize the Choice program and attend a school outside of the student's assigned district. Because of the growing popularity of the Choice program, as supported by the Florida Department of Education, and the ability to reconfigure attendance zones in order to balance capacity and enrollment, a Countywide Educational System Impact Fee service area is appropriate for Sarasota County.

BUILDING AND SITE LEVEL-OF-SERVICE STANDARDS

This section provides current inventories of elementary, middle, and high schools in the School District of Sarasota County. The data contained in these tables are used to determine infrastructure standards for school buildings and sites on which the Educational System Impact Fees are based.

Elementary Schools

The inventory and current levels of service for the School District of Sarasota County elementary schools are shown below in Figure 10. As indicated below, elementary school buildings have a total of 2,876,375 square feet of building floor area on 610 acres. Total enrollment in all elementary schools for the 2021-2022 school year is 16,978 and total permanent capacity is 19,882. Overall, elementary schools are operating at 85 percent capacity.

Since elementary schools overall are currently operating under capacity, *the level of service standard on which the facility fees are based is calculated using permanent capacity* (shaded in Figure 10). This ensures new development is not charged for a higher level of service than what is currently provided or what is

planned to be provided, using a level of service that is based on capacity represents the level of service the School District provides (or will ultimately provide).

Levels of service are calculated by dividing the amount of infrastructure by capacity. For example, 2,876,375 square feet of school building space is divided by a permanent capacity of 19,882 students to arrive at 144.67 square feet per student.

Figure 10: School District of Sarasota County Elementary Schools

School	Building Sq Ft*	Acreage*	2021-2022 Enrollment**	Permanent Capacity*	Enrollment vs Capacity
Alta Vista Elementary	139,005	21	475	848	56%
Ashton Elementary	102,186	22	1,031	734	140%
Atwater Elementary	130,501	35	672	1,028	65%
Bay Haven School of Basics Plus	82,545	5	587	664	88%
Brentwood Elementary	101,148	19	603	1,043	58%
Cranberry Elementary	119,614	29	723	761	95%
Emma E. Booker Elementary	109,902	28	517	746	69%
Englewood Elementary	100,719	20	575	644	89%
Fruitville Elementary	126,325	15	745	985	76%
Garden Elementary	66,927	30	535	482	111%
Glenallen Elementary	136,724	47	669	930	72%
Gocio Elementary	95,960	20	617	584	106%
Gulf Gate Elementary	153,189	20	700	913	77%
Lakeview Elementary	68,423	40	685	594	115%
Lamarque Elementary	150,300	30	1,027	1,069	96%
Phillippi Shores Elementary	121,162	13	761	731	104%
Southside Elementary	102,888	8	681	826	82%
Tatum Ridge Elementary	121,776	27	784	761	103%
Taylor Ranch Elementary	124,605	25	868	781	111%
Toledo Blade Elementary	133,044	27	766	853	90%
Tuttle Elementary	107,357	18	666	849	78%
Venice Elementary	126,673	22	540	766	70%
Wilkinson Elementary	143,242	24	437	786	56%
Laurel Nokomis	117,892	36	783	900	87%
Oak Park	56,621	12	99	215	46%
Pine View	37,647	17	432	388	111%
Total	2,876,375	610	16,978	19,882	85%

<i>Elementary School Levels of Service</i>	<i>Building SF</i>	<i>Site Acreage</i>
LOS per Student (current enrollment)	169.42	0.036
LOS per Student (current capacity)	144.67	0.031

*Florida Inventory of School Houses (FISH)

**October enrollment totals

Middle Schools

The inventory and current levels of service for the School District of Sarasota County middle schools are shown below in Figure 11. As indicated below, middle school buildings have a total of 1,550,302 square feet of building floor area on 434 acres. Total enrollment in all middle schools is 7,470 and total permanent capacity is 11,219. Overall, middle schools are operating at 67 percent capacity.

Since middle schools overall are currently operating under capacity, *the level of service standard on which the facility fees are based is calculated using permanent capacity* (shaded in Figure 11). This ensures new development is not charged for a higher level of service than what is currently provided or what is planned to be provided, using a level of service that is based on capacity represents the level of service the School District provides (or will ultimately provide).

Levels of service are calculated by dividing the amount of infrastructure by capacity. For example, 1,550,302 square feet of school building space is divided by a permanent capacity of 11,219 students to arrive at 138.18 square feet per student.

Figure 11: School District of Sarasota County Middle Schools

School	Building Sq Ft*	Acreage*	2021-2022 Enrollment**	Permanent Capacity*	Enrollment vs Capacity
Booker Middle	216,057	42	911	1,819	50%
Brookside Middle	194,811	19	760	1,484	51%
Heron Creek Middle	212,014	93	835	1,531	55%
McIntosh Middle	209,637	77	846	1,235	69%
Sarasota Middle	177,432	41	1,215	1,406	86%
Venice Middle	151,775	51	760	1,090	70%
Woodland Middle	227,483	57	972	1,410	69%
Laurel Nokomis	73,365	22	540	560	96%
Oak Park	33,872	7	57	129	44%
Pine View	53,856	25	574	555	103%
Total	1,550,302	434	7,470	11,219	67%

Middle School Levels of Service

	Building SF	Site Acreage
LOS per Student (current enrollment)	207.54	0.058
LOS per Student (current capacity)	138.18	0.039

*Florida Inventory of School Houses (FISH)

**October enrollment totals

High Schools

The inventory and current levels of service for the School District of Sarasota County high schools are shown below in Figure 12. As indicated below, high school buildings have a total of 2,381,185 square feet of building floor area on 348 acres. Total enrollment in all high schools is 12,656 and total permanent capacity is 13,123. Overall, high schools are operating at 96 percent capacity.

Since high schools overall are currently operating under capacity, *the level of service standard on which the facility fees are based is calculated using permanent capacity* (shaded in Figure 12). This ensures new

development is not charged for a higher level of service than what is currently provided or what is planned to be provided, using a level of service that is based on capacity represents the level of service the School District provides (or will ultimately provide).

Levels of service are calculated by dividing the amount of infrastructure by capacity. For example, 2,381,185 square feet of school building space is divided by a permanent capacity of 12,686 students to arrive at 181.45 square feet per student.

Figure 12: School District of Sarasota County High Schools

School	Building Sq Ft*	Acreage*	2021-2022 Enrollment**	Permanent Capacity*	Enrollment vs Capacity
Booker High	290,081	43	1,299	1,535	85%
North Port High	476,879	104	2,461	2,783	88%
Riverview High	486,714	43	2,543	2,646	96%
Sarasota High	497,331	52	2,506	2,442	103%
Suncoast Polytechnical High	78,177	9	540	576	94%
Venice High	413,009	50	2,451	2,155	114%
Oak Park	68,754	15	119	262	45%
Pine View	70,240	32	737	724	102%
Total	2,381,185	348	12,656	13,123	96%

High School Levels of Service	<i>Building SF</i>	<i>Site Acreage</i>
LOS per Student (current enrollment)	188.15	0.028
LOS per Student (current capacity)	181.45	0.027

*Florida Inventory of School Houses (FISH)

**October enrollment totals

COST OF SCHOOL CONSTRUCTION

The Florida Department of Education provides an annual report of statewide school construction projects. The report breaks down the costs into categories and includes the type of school and square footage. This allows for construction costs per square foot to be calculated. Listed in Figure 13, the average cost per square foot for elementary school construction is \$254, middle school \$207, and high school \$307.

Figure 13: Cost of School Construction

School Level	Construction Cost per Square Foot
Elementary	\$254
Middle	\$207
High	\$307

Source: Florida Department of Education 2020 report of of statewide school construction. Excludes land costs

LAND COSTS

The School District of Sarasota County anticipates the need to purchase land for future school sites to accommodate school capital needs brought about by growth in the County. Below is a list of recent land purchases by the District. The weighted average of the three transactions is \$122,000 per acre, rounded.

Figure 14: Land Cost Component

Land Purchases	Year	Acres	Cost	Cost per Acre
Clark Road	2020	65.0	\$6,300,000	\$96,900
Lakewood Ranch	2021	60.0	\$7,650,000	\$127,500
Wellen Park	2021	130.4	\$17,216,403	\$132,000
Total		255.4	\$31,166,403	\$122,000

Source: Sarasota County School District

BUS LEVEL-OF-SERVICE AND COSTS

Buses are another infrastructure component included in the Educational System Impact Fee. New buses will need to be purchased to accommodate increased enrollment due to new development. There are 320 buses in the District's fleet and total current value of the is estimated at approximately \$44.8 million. The current level of service is .009 buses per student.

Figure 15: School District of Sarasota County Bus Fleet

Type	Units	Cost	Total Value
School Buses	320	\$140,000	\$44,800,000
Total	320		\$44,800,000

Level of Service	
Total Current Enrollment	37,104
Buses per Student	0.009

Average Cost per Bus	\$140,000
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CREDIT FOR FUTURE PRINCIPAL PAYMENTS ON EXISTING DEBT

Because the School District of Sarasota County debt-financed recent school capacity expansions through Certificates of Participation (COPs), a credit is included for future principal payments on this outstanding debt. A credit is necessary since new residential units that will pay the Educational System Impact Fee will also contribute to future principal payments on this remaining debt through property taxes. A credit is not necessary for interest payments because interest costs are not included in the Educational System Impact Fee calculation.

School District staff provided outstanding amortization schedules for existing COPs for capacity adding school construction projects. *(It is important to note that not all of the debt incurred as part of these COPs was strictly for capacity projects.)* However, in addition, although property tax from nonresidential

properties also contribute to the retirement of these debt issuances, the Educational System Impact Fee methodology is crediting 100 percent of the debt payments to residential units.

As shown in Figure 16, outstanding principal payments is approximately \$54.3 million. Annual principal payments are divided by projected student enrollment in each year to get a per student credit. For example, in the 2022-2023 school year, the total principal to be paid is \$14,519,437. This is divided by total enrollment of 37,430 for a principal payment per student of \$388. To account for the time value of money, annual payments per student are discounted using a net present value formula based on the interest rate of each issuance (in this case 1.74 percent). The total net present value of future principal payments per student is \$1,388. This amount is subtracted from the gross capital cost per student to derive a net capital cost per student.

Figure 16: Credit for Future Principal Payments on Existing Certificates of Participation

Year	COP Principal Payments	Student Enrollment	Payment per Student
2022	\$14,519,437	37,430	\$388
2023	\$14,739,437	37,409	\$394
2024	\$14,959,437	37,599	\$398
2025	\$8,179,437	37,731	\$217
2026	\$1,924,437	38,122	\$50
Total	\$54,322,185		\$1,447

Capitalization Rate 1.74%

Net Present Value per Student \$1,388

CREDIT FOR FUTURE REVENUE

Future school capacity construction projects will be funded through a combination of impact fees, the District's 1.5 capital millage rate, and the School District's share of the Countywide local option sales tax. To ensure there is no double payment for future non-impact fee revenue generated by new development, an additional credit is included. The cost of future capacity increasing construction projects are shown below in Figure 17. The total cost of these planned projects (\$357 million) is spread over ten years (\$35.7 million annually) and compared to the projected enrollment in ten years (39,168) to derive a revenue credit of \$911 per student. Finally, the total credit is estimated over a 20-year period, which corresponds to a typical debt issuance. This results in a credit of \$15,277 per student. **It is recognized this provides more credit than what is legally required, as this approach credits new development for 100% of non-impact fee revenue.**

Figure 17: Credit for Future Revenues

Project	Cost
Future Capacity Increasing Projects	
Lakewood Ranch Elementary (new school)	\$40,000,000
Wellen Park High School (new school)	\$155,000,000
Wellen Park K-8 (new school)	\$81,000,000
Clark and Lorraine K-8 (new school)	\$81,000,000
10-Year Capital Expenditures Eligible for Credit:	\$357,000,000
10-Year Grand Total	\$357,000,000
Annual Average	\$35,700,000
Projected Enrollment in 10 Years	39,168
Revenue Credit per Student	\$911
Capitalization Rate	1.74%
Capitalization Period, Years	20
Present Value of Revenue Credit per Student	\$15,277

EDUCATIONAL SYSTEM IMPACT FEE INPUT VARIABLES SUMMARY

The fees are calculated by multiplying the student generation rate for each housing type by the net capital cost per student for each type of school. Each component is then added together to derive the total Educational System Impact Fee. Factors used to derive the School District of Sarasota County's Educational System Impact Fees are summarized in Figure 18. Level-of-service standards are based on current costs per student for school buildings, school land, and buses as described in the previous sections and summarized below.

The gross capital cost per student is the sum of the cost per student for each component. For example, for the elementary school portion, the calculation is as follows: $\$36,747$ [building construction] + $\$3,746$ [land] + $\$1,260$ [buses] = $\$41,753$ gross capital cost per student.

The net capital cost per student is the sum of the gross capital cost per student and the recommended credits for future principal payments on existing COPs and future revenues. Continuing with the elementary school example, the calculation is as follows: $\$41,753$ [gross capital cost per student] - $\$1,388$ [future principal payment COPs] - $\$15,277$ [future revenues] = $\$25,088$ net capital cost per student. The same approach is followed for middle and high schools.

Figure 18: Educational System Impact Fee Input Variables Summary

<i>Public School Students per Housing Unit</i>	School Level			<i>Total</i>
	<i>Elementary (K-5)</i>	<i>Middle (6-8)</i>	<i>High (9-12)</i>	
Single Family (Detached)	0.103	0.042	0.073	0.219
Multifamily (Apt/Condo/Townhouse)	0.038	0.014	0.023	0.075
Mobile Home / RV Park	0.010	0.005	0.006	0.021

Current Level of Service Standards				
	<i>Elementary</i>	<i>Middle</i>	<i>High</i>	
Permanent Building Square Feet per Student	144.67	138.18	181.45	
Total Cost per Square Foot	\$254	\$207	\$307	
Total Building Construction Cost per Student	\$36,747	\$28,603	\$55,706	
Acreage per Student	0.031	0.039	0.027	
Land Cost per Acre	\$122,000	\$122,000	\$122,000	
Land Cost per Student	\$3,746	\$4,723	\$3,238	
Buses per Student	0.009	0.009	0.009	
Cost per Bus	\$140,000	\$140,000	\$140,000	
Bus Cost per Student	\$1,260	\$1,260	\$1,260	
Total Gross Capital Cost per Student	\$41,753	\$34,586	\$60,203	
Credit for Existing COPS Payments	(\$1,388)	(\$1,388)	(\$1,388)	
Credit for Future Revenue for Capital Projects	(\$15,277)	(\$15,277)	(\$15,277)	
Total Net Local Capital Cost per Student	\$25,088	\$17,921	\$43,538	

MAXIMUM SUPPORTABLE EDUCATIONAL SYSTEM IMPACT FEES

For example, for a single family unit, the elementary school portion of the fee is calculated by multiplying the student generation rate of .103 by the net capital cost per elementary student of \$25,088, which results in \$2,593 per single family unit. This is repeated for the other school levels. Totals for the three school levels of the fee are added together to calculate the total fee per single-family unit of \$6,533 (\$2,593 + \$761 + \$3,179 = \$6,533). This is repeated for each housing unit type.

Figure 19: Maximum Supportable Educational System Impact Fees

Maximum Supportable Education System Impact Fees				
	<i>Elementary (K-5)</i>	<i>Middle (6-8)</i>	<i>High (9-12)</i>	<i>Total</i>
Single Family	\$2,593	\$761	\$3,179	\$6,533
Multifamily (Apt/Condo/Townhouse)	\$960	\$249	\$984	\$2,193
Mobile Home / RV Park	\$263	\$81	\$248	\$592

Figure 20 lists the results of the 2015 impact fee study, the current fee amounts, and the results of this study. The results of this study are less than the 2015 study, however, the maximum supportable amounts found in this study are over three times that of the current fees being collected.

Figure 20: Comparison to Current Education System Impact Fees

Housing Type	2015 Study Results [1]	Current Fee	2022 Maximum Supportable	Increase from Current Fee
Per Housing Unit				
Single Family	\$7,835	\$2,032	\$6,533	\$4,501
Multifamily	\$2,165	\$516	\$2,193	\$1,677
Mobile Home	\$722	\$188	\$592	\$404

[1] Tindale Oliver, 2015



School District of Sarasota County

Impact Fee Study Update
April 12, 2022



40-year consulting practice serving local governments nationwide

- Impact fees/infrastructure financing strategies
- Fiscal/economic impact analyses
- Capital improvement planning
- Infrastructure finance/revenue enhancement
- Real estate and market feasibility

Clay County
Schools

DeSoto County
Schools

Flagler County
Schools

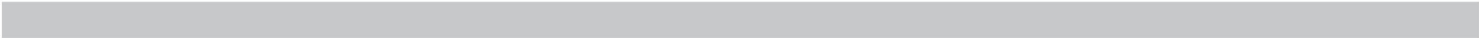
Lee County
Schools

Manatee
County
Schools

Osceola
County
Schools

Pasco County
Schools

Sarasota
County
Schools



- One-time payment for growth-related infrastructure
- Can't be used for operations, maintenance, or replacement
- Not a tax but more like a contractual arrangement to build infrastructure, with three requirements
 - » Need
 - » Benefit
 - Short range expenditures
 - Geographic service areas and/or benefit districts
 - » Proportionate to demand

Recent Legislative Changes

- Florida's dual nexus test was codified in the Florida Impact Fee Act 163.31801 in 2019
 - » “the impact fee must be proportional and reasonably connected to, or have a rational nexus with, the need for additional capital facilities and the increased capacity and the increased demand generated by the new residential construction”
 - » “the impact fee must be proportional and reasonably connected to, or have a rational nexus with, the expenditure of the funds collected and the benefits accruing to the new residential construction
- Needs to reflect the most current and localized data
 - » Burden of proof is on public agencies



Recent Legislative Changes

■ Impact fee increases

- » An increase of not more than 25% must be implemented in two equal annual increments
- » An increase between 25% and 50% must be implemented in four equal increments
- » An impact fee increase may not exceed 50% of the current rate

■ Fee increase can exceed the phase-in limitations if:

- » Conduct an analysis demonstrating “extraordinary circumstances”
- » Two publicly noticed workshops
- » Increase must be approved by at least two-thirds vote of the governing body



Recent Legislative Changes

- A county, municipality, or special district may provide an exception or waiver for an impact fee for the development or construction of affordable housing, as defined in s. 420.9071
 - » It is not necessary to offset the waiver or exception with other revenue

■ Site specific

- » Developer constructs a capital facility included in fee calculations

■ Debt service

- » Avoid double payment due to existing or future bonds

■ Dedicated revenues

- » Property tax, local option sales tax



Educational Facility Impact Fee

- Bricks and mortar classroom space
 - » Elementary Schools
 - » Middle Schools
 - » High Schools
- Land for future schools
- Buses
- Credits for existing and future debt service

Student Generation Rates

- To establish **proportionately**, student generation rates are calculated for single family and multifamily units

Housing Type	ES SGR	MS SGR	HS SGR	Total SGR
Single Family (Detached)	0.103	0.042	0.073	0.219
Multifamily (Apt/Condo/Townhouse)	0.038	0.014	0.023	0.075
Mobile Home / RV Park	0.010	0.005	0.006	0.021

Source: Sarasota County Assessor's Office parcel GIS database; School Board of Sarasota County student geocoded database

Housing Type	2015 SGR [1]	2022 SGR	SGR Change	Percent Change
Single Family (Detached)	0.228	0.219	(0.009)	-4%
Multifamily (Apt/Condo/Townhouse)	0.063	0.075	0.012	19%
Mobile Home / RV Park	0.021	0.021	0.000	0%

[1] Source: Tindale-Oliver Educational System Impact Fee Update Study, 2015

Summary of Residential Demand

Sarasota County, FL	Base Year 2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Increase
Population [1]	438,816	445,473	452,130	458,786	465,443	472,100	477,320	482,540	487,760	492,980	502,640	63,824
Annual Percent Increase		1.5%	1.5%	1.5%	1.5%	1.4%	1.1%	1.1%	1.1%	1.1%	2.0%	14.5%
Housing Type [2]												
Single Family	142,789	144,955	147,121	149,287	151,453	153,619	155,318	157,016	158,715	160,413	163,557	20,768
Multifamily	85,671	86,971	88,270	89,570	90,870	92,169	93,188	94,208	95,227	96,246	98,132	12,461
Mobile Home	23,510	23,867	24,224	24,580	24,937	25,294	25,573	25,853	26,133	26,412	26,930	3,419
Total	251,970	255,793	259,615	263,437	267,260	271,082	274,079	277,077	280,074	283,071	288,618	36,648

[1] Source: School Board of Sarasota County, *2021-2022 Capital Improvement Plan*

[2] Housing units are assumed to grow at the same rate as the projected population

Projection of Enrollment

- Large number of students returning to “bricks and mortar” classroom space in 2021 and 2022

» *Projections have little affect the impact fee calculation*

Student Enrollment	Base Year 2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Increase
Elementary School	16,978	17,383	17,390	17,470	17,498	17,711	17,807	17,903	17,999	18,095	18,191	1,213
Middle School	7,470	7,379	7,227	7,326	7,408	7,469	7,499	7,530	7,560	7,591	7,621	151
High School	12,656	12,668	12,792	12,804	12,825	12,942	13,025	13,108	13,190	13,273	13,356	700
Total	37,104	37,430	37,409	37,599	37,731	38,122	38,331	38,540	38,750	38,959	39,168	2,064

Source: Enrollment projections through 2026 are based on analysis conducted by School District's Finance Department. The projections from 2027-2031 is based on the average enrollment changes from the previous five years and projected five years.

Enrollment to Capacity

School District of Sarasota County	21/22 October Enrollment	Permanent Capacity [1]	Available Capacity	Enrollment vs Capacity
Elementary School	16,978	19,882	2,904	85%
Middle School	7,470	11,219	3,749	67%
High School	12,656	13,123	467	96%
Total	37,104	44,224	7,120	84%

[1] Source: Florida Department of Education, Florida Inventory of School Houses (FISH)

	Green equals Preferred Capacity of .89499 or less
	Yellow equals Warning Capacity of .895 - .99499
	Red equals Maximum Capacity of .995 or above

Level of Service (student station)

<i>Elementary School Levels of Service</i>	<i>Building SF</i>	<i>Site Acreage</i>
LOS per Student (current enrollment)	169.42	0.036
LOS per Student (current capacity)	144.67	0.031

*Florida Inventory of School Houses (FISH)

**October enrollment totals

<i>Middle School Levels of Service</i>	<i>Building SF</i>	<i>Site Acreage</i>
LOS per Student (current enrollment)	207.54	0.058
LOS per Student (current capacity)	138.18	0.039

*Florida Inventory of School Houses (FISH)

**October enrollment totals

<i>High School Levels of Service</i>	<i>Building SF</i>	<i>Site Acreage</i>
LOS per Student (current enrollment)	188.15	0.028
LOS per Student (current capacity)	181.45	0.027

*Florida Inventory of School Houses (FISH)

**October enrollment totals

The factors shown in green shading are used to determine the cost per student station

Planned Capacity Projects

Project	FY22-23	FY23-24	FY24-25	FY25-26	FY26-27	Total
Lakewood Ranch Elementary (new school)	\$0	\$0	\$0	\$0	\$40,000,000	\$40,000,000
Wellen Park High School (new school)	\$10,500,000	\$143,500,000	\$1,000,000	\$0	\$0	\$155,000,000
Wellen Park K-8 (new school)	\$0	\$80,000,000	\$1,000,000	\$0	\$0	\$81,000,000
Clark and Lorraine K-8 (new school)	\$81,000,000	\$0	\$0	\$0	\$0	\$81,000,000
School Site Purchases	\$0	\$7,960,000	\$0	\$0	\$11,850,000	\$19,810,000
TOTAL	\$91,500,000	\$231,460,000	\$2,000,000	\$0	\$51,850,000	\$376,810,000

Source: Sarasota County School District, *Draft 2022/2023 Capital Improvement Plan*

Cost of Construction

■ Florida DOE costs typically lag two years

- » Costs for planned construction projects are coming in higher

School Level	Construction Cost per Square Foot
Elementary	\$254
Middle	\$207
High	\$307

Source: Florida Department of Education 2020 report of of statewide school construction. Excludes land costs

School Type	2020 DOE Report	2022 SCS Costs	Difference	%
Elementary	\$ 254	\$ 397	\$ (143)	-56%
Middle	\$ 207	\$ 341	\$ (134)	-65%
High	\$ 307	\$ 418	\$ (111)	-36%

Land Cost Component

Land Purchases	Year	Acres	Cost	Cost per Acre
Clark Road	2020	65.0	\$6,300,000	\$96,900
Lakewood Ranch	2021	60.0	\$7,650,000	\$127,500
Wellen Park	2021	130.4	\$17,216,403	\$132,000
Total		255.4	\$31,166,403	\$122,000

Source: Sarasota County School District

Bus Component

Type	Units	Cost	Total Value
School Buses	320	\$140,000	\$44,800,000
Total	320		\$44,800,000

Level of Service	
Total Current Enrollment	37,104
Buses per Student	0.009

Average Cost per Bus	\$140,000
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■ Existing Certificates of Participation

Year	COP Principal Payments	Student Enrollment	Payment per Student
2022	\$14,519,437	37,430	\$388
2023	\$14,739,437	37,409	\$394
2024	\$14,959,437	37,599	\$398
2025	\$8,179,437	37,731	\$217
2026	\$1,924,437	38,122	\$50
Total	\$54,322,185		\$1,447

Capitalization Rate 1.74%

Net Present Value per Student	\$1,388
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Credits

- Conservative approach for future revenue (sales tax, debt payments) that gives more credit than legally required

Project	Cost
Future Capacity Increasing Projects	
Lakewood Ranch Elementary (new school)	\$40,000,000
Wellen Park High School (new school)	\$155,000,000
Wellen Park K-8 (new school)	\$81,000,000
Clark and Lorraine K-8 (new school)	\$81,000,000
10-Year Capital Expenditures Eligible for Credit:	\$357,000,000

10-Year Grand Total	\$357,000,000
Annual Average	\$35,700,000
Projected Enrollment in 10 Years	39,168
Revenue Credit per Student	\$911
Capitalization Rate	1.74%
Capitalization Period, Years	20
Present Value of Revenue Credit per Student	\$15,277

Summary of Inputs

<i>Public School Students per Housing Unit</i>	School Level			<i>Total</i>
	<i>Elementary (K-5)</i>	<i>Middle (6-8)</i>	<i>High (9-12)</i>	
Single Family (Detached)	0.103	0.042	0.073	0.219
Multifamily (Apt/Condo/Townhouse)	0.038	0.014	0.023	0.075
Mobile Home / RV Park	0.010	0.005	0.006	0.021

Current Level of Service Standards			
	<i>Elementary</i>	<i>Middle</i>	<i>High</i>
Permanent Building Square Feet per Student	144.67	138.18	181.45
Total Cost per Square Foot	\$254	\$207	\$307
Total Building Construction Cost per Student	\$36,747	\$28,603	\$55,706
Acreage per Student	0.031	0.039	0.027
Land Cost per Acre	\$122,000	\$122,000	\$122,000
Land Cost per Student	\$3,746	\$4,723	\$3,238
Buses per Student	0.009	0.009	0.009
Cost per Bus	\$140,000	\$140,000	\$140,000
Bus Cost per Student	\$1,260	\$1,260	\$1,260
Total Gross Capital Cost per Student	\$41,753	\$34,586	\$60,203
Credit for Existing COPS Payments	(\$1,388)	(\$1,388)	(\$1,388)
Credit for Future Revenue for Capital Projects	(\$15,277)	(\$15,277)	(\$15,277)
Total Net Local Capital Cost per Student	\$25,088	\$17,921	\$43,538

Draft Impact Fee

Maximum Supportable Education System Impact Fees				
	<i>Elementary (K-5)</i>	<i>Middle (6-8)</i>	<i>High (9-12)</i>	<i>Total</i>
Single Family	\$2,593	\$761	\$3,179	\$6,533
Multifamily (Apt/Condo/Townhouse)	\$960	\$249	\$984	\$2,193
Mobile Home / RV Park	\$263	\$81	\$248	\$592

Housing Type	2015 Study Results [1]	Current Fee	2022 Maximum Supportable	Increase from Current Fee
Per Housing Unit				
Single Family	\$7,835	\$2,032	\$6,533	\$4,501
Multifamily	\$2,165	\$516	\$2,193	\$1,677
Mobile Home	\$722	\$188	\$592	\$404

[1] Tindale Oliver, 2015

Implementation Options

Maximum Supportable Education System Impact Fee Phase In (25% Increase)				
	<i>Maximum</i>	<i>Allowable</i>		
	Fee	Increase @ 25%	2022	2023
Single Family	\$2,540	\$508	\$2,286	\$2,540
Multifamily (Apt/Condo/Townhouse)	\$645	\$129	\$581	\$645
Mobile Home / RV Park	\$235	\$47	\$212	\$235

Maximum Supportable Education System Impact Fee Phase In (50% Increase)						
	<i>Maximum</i>	<i>Allowable</i>				
	Fee	Increase @ 50%	2022	2023	2024	2025
Single Family	\$3,048	\$1,016	\$2,286	\$2,540	\$2,794	\$3,048
Multifamily (Apt/Condo/Townhouse)	\$774	\$258	\$581	\$645	\$710	\$774
Mobile Home / RV Park	\$282	\$94	\$212	\$235	\$259	\$282

Impact Fee Comparisons

Educational Facilities IF Schedule Comparison

County ⁽¹⁾	Date of Last Update ⁽²⁾	Adoption Percentage ⁽²⁾	Adopted Single Family Impact Fee ⁽²⁾
Osceola County	2017	100%	\$11,823
Broward County (4 Bedroom)	2022	100%	\$11,070
Lake County	2015	100%	\$9,324
Seminole County	2017	73%	\$9,000
Broward County (3 Bedrooms or less)	2022	100%	\$8,809
Collier County ⁽⁵⁾	2015	67%	\$8,790
Orange County	2016	100%	\$8,784
Pasco County	2017	79%	\$7,128
Clay County	2009	77%	\$7,034
St. Lucie County ⁽⁵⁾	2009	100%	\$6,529
Manatee County	2017	100%	\$6,127
Martin County	2006	100%	\$5,567
Nassau County	2017	100%	\$5,431
Polk County	2015	50%	\$5,242
Brevard County	2015	50%	\$5,097
St. Johns County	2018	100%	\$4,725
Palm Beach County	2019	61%	\$4,237
Hillsborough County	2004	92%	\$4,000
Marion County ^{(5)*}	2006	48%	\$3,967
Flagler County	2004	76%	\$3,600
Hernando County ⁽⁴⁾	2005	50%	\$3,176
Sarasota County ⁽³⁾ - Proposed Maximum @50%	2022	100%	\$3,048
Volusia County	2013	67%	\$3,000
Lee County ⁽⁵⁾	2015	47.5%	\$2,605
Sarasota County ⁽³⁾ - Proposed Maximum @25%	2022	50%	\$2,540
Miami-Dade County	1995	100%	\$2,448
Sarasota County - Current	2015	26%	\$2,032
Indian River County	2014	28%	\$1,702
Citrus County	2014	50%	\$1,261

1) County's tagged with an asterisk (*) have fees that are currently suspended

2) Source: Published impact fee schedules and discussions with representatives from each County

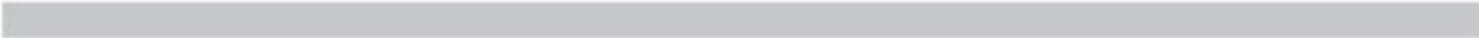
3) Maximum fee assumes new limitation on fee increases

4) Effective June 2020

5) Fees are indexed annually



Questions/Comments





April 12, 2022 Board Meeting
Agenda Item 7.

Title

CAPITAL IMPROVEMENT PLAN (CIP)

Description

Recommendation

Contact

DUMAS

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Capital Budget Update	4/8/2022	Cover Memo
Worksheets	4/8/2022	Cover Memo

Capital Budget Update

Board Work Session

04/12/2022

Capital Budget

- Due to construction cost escalations and revising the capital project priorities to align with the District's growth and preservation goals for existing space, staff is presenting this information and recommendations for revisions to the existing Capital Plan.
- The Capital Projects Team (CPT) reviewed the current 5-Year Capital Plan to determine if scopes, budgets and timelines were appropriate. Specific projects targeted were:
 - New High School in Wellen Park
 - Sarasota High Building 13 & 14 Renovation
 - Gocio Elementary Building 3 Replacement & Partial Renovation
 - Booker Middle School Re-roof
 - Oak Park "1 Wing Per Year"
- Scope validation included recommendations from the Comprehensive Facility Assessment completed by Jacobs Engineering in 2021.
- Budget validation included adjustments for current cost escalations, reviewing alternative materials more readily available (ie: concrete in lieu of steel), and understanding the most recent historical data.
- Timeline validation included input from Architects and Construction Managers, and consideration of potential phasing (ie: SHS Renovation), portables or other swing space, summer work, and seasonal work.
- These new projects align with the [District's Strategic Plan](#):
 - **Goal 2** – Foster a healthy, supportive learning environment for ALL students
 - **Strategy 5** – Create an environment in which physical safety is a priority
 - **Goal 4** – Collaborate with and engage school communities to support the achievement of our students
 - **Strategy 1** – Strengthen our brand through effective marketing and two-way district and school-based communications
 - **Goal 5** – Efficient and effective operations through fiscal stewardship
 - **Strategy 1** – Maximize efficiency of operations
 - **Strategy 3** – Focus on environmental sustainability

The Construction Services Department (CSD) utilized all available resources to ensure scopes, budgets, and timelines presented to the Board were complete, current and accurate.



Scope/Budget/Timeline Validation

SCS engaged a third-party firm to validate project scope, budget, and timeline for the following projects:

- New High School in Wellen Park
 - 325,000 s.f.
 - 1,900 student stations with core capacity for 2,100
 - Shared CEP for HS & K-8
- Sarasota High Building 13 & 14
 - Phased
 - Complete renovation, including: portables for swing space, new HVAC systems and equipment, new ceilings, new lighting, painting, flooring, some new doors and hardware, some new casework, upgrading group restrooms and enclosing the open vestibules for security.

A third-party Architect, (SchenkelShultz Architecture), was engaged to validate that the high school and K-8 would fit on the District's 130 acre site located in Wellen Park, including full amenities such as parking, queuing, driveways, play fields, athletic facilities, retention, and school buildings.

This aerial photograph shows the proposed site plan for the new high school. The plan includes a large central building footprint, several parking lots, and various sports facilities. A large, irregularly shaped pond is located in the lower-left portion of the site. The surrounding landscape is a mix of green fields and wooded areas. The plan is overlaid on a color-coded map showing different land use zones.

The current budget of \$155 million is adequate.

A third-party Construction Manager (Gilbane), was engaged to validate the scope, review the displacement of classrooms, determine the portable requirements, and create a master schedule for the project. They prepared a conceptual estimate based on current, local data including subcontractor input.

The current budget is \$30.8 million.
The revised budget is \$37.5 million.

[illegible]

Booker Middle School Re-roof

The Construction Manager (Jon Swift Construction) and Architect (PBA Design Group) have been collaborating with the Principal, CSD and Facilities to prepare Construction Documents and secure the necessary permit to remove/replace the metal roofing and enhance the structure to meet current building codes. This work will be phased so the majority of the project can be completed during the summer months.



The current placeholder budget is \$7.5 million.
The revised budget is \$13 million.

Oak Park One Wing Per Year

The plan for Oak Park is to complete the renovation of one wing per year to be designed and permitted during the school year, with the majority of the work being completed over the summer months, in order to minimize disruption to the students. Building 6 was done during Summer 2021. Based upon that scope and the best phasing plan for the school, the following was developed:

Building #	S.F.	Construction Cost	FFE Cost	Total
14	13,000	\$ 1,481,989.00	\$ 150,000.00	\$ 1,631,989.00
10	17,000	\$ 2,454,260.00	\$ 150,000.00	\$ 2,604,260.00
11	16,000	\$ 2,656,376.00	\$ 150,000.00	\$ 2,806,376.00
4	35,000	\$ 6,682,446.00	\$ 300,000.00	\$ 6,982,446.00
1+2+3	15,000	\$ 3,293,491.00	\$ 150,000.00	\$ 3,443,491.00

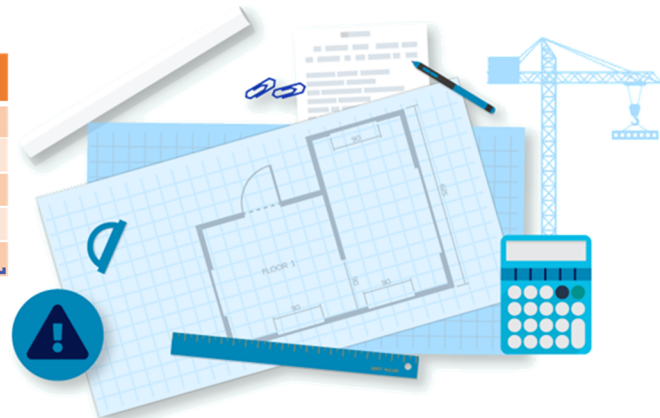
Gocio Elementary

The Construction Manager (Willis A. Smith Construction) and Architect (Fawley Bryant Architecture) have been collaborating with the Principal, CSD and District staff to complete Schematic Documents. This includes validating the scope, reviewing the Comprehensive Facility Assessment done in 2021, and ensuring the educational program needs are being met. Last month, the team met with Jody Dumas and Don Hampton to review.

Added components at Gocio Elementary include:

- Larger classroom building space for specialized student services, consolidating the Music and Arts programs, and providing lab spaces
- Locating all Pre-K and Kindergarten classrooms in Building 1
- Enlarging the clinic
- New covered play area with restrooms and storage
- Upgrades to the Central Energy Plant
- Additional queuing space and site drainage
- Security fencing to enhance single point of entry and overall campus security

The current budget is \$15 million.
The revised budget is \$25 million.



2022/23 Capital Plan Budget

	2021-2022 Pending Budget Amendment	2022-2023 Projection	2023-2024 Projection	2024-2025 Projection	2025-2026 Projection	2026-2027 Projection	2027-2028 Projection
Revenues							
Begin Fund Balance	126,795,895	43,097,853	47,489,146	52,093,430	65,433,584	76,493,323	61,758,678
Estimated Revenues	135,661,505	152,354,645	130,384,718	147,565,004	153,388,757	156,717,341	160,498,516
Impact Fees	4,200,000	4,100,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000
New Debt	-	108,188,668	299,000,000	59,020,000	-	53,240,000	-
Total Revenues & Begin Fund Balance	287,512,593	307,741,166	480,873,864	262,678,434	222,822,341	290,450,664	226,257,194
Recurring Appropriations							
Transfers & Debt Srv	70,783,703	76,652,914	89,435,611	89,481,561	84,651,872	82,127,145	76,658,735
Transfers & Debt Srv - Charter (State Funded PECO)	3,554,281	3,316,404	3,316,404	3,316,404	3,316,404	3,316,404	3,720,644
Recurring Expenses	53,437,220	37,531,851	33,682,669	34,425,884	44,527,471	46,027,471	51,914,762
Charter School Payments - Millage	1,737,802	1,666,750	1,666,750	1,666,750	1,666,750	1,666,750	2,682,436
Charter School Payments - Sales Tax	-	-	-	2,047,875	4,164,075	4,300,725	4,437,375
Total Recurring Appropriations	129,513,006	119,167,919	128,101,434	130,938,474	138,326,572	137,438,495	139,413,952
Capital Projects							
Bay Haven Building 4	12,705,000	5,400,000	-	-	-	-	-
Booker High VPA	23,050,307	-	-	-	-	-	-
Booker Middle Roofing	12,923,098	-	-	-	-	-	-
Englewood Building 6 Rebuild	3,306,710	-	-	-	-	-	-
Fruitville Building 5 Rebuild instead of Remodel	-	-	-	-	-	9,900,000	8,200,000
Garden Rebuild New School Current Site	-	-	40,000,000	-	-	-	-
Gocio New Classroom Wing and Campus Refresh	14,206,567	10,793,433	-	-	-	-	-
High School Track & Football Field Upgrades	3,105,820	2,420,000	2,662,000	2,480,000	1,020,000	1,020,000	1,020,000
Landings Restroom Repairs/Renovation	3,191,086	-	-	-	-	-	-
McIntosh Middle Farm Upgrades	-	3,200,000	-	-	-	-	-
New Construction Elementary Lakewood Ranch	-	-	-	-	-	53,240,000	-
New Construction High School Wellen Park	-	10,500,000	143,500,000	1,000,000	-	-	-
New Construction K-8 Wellen Park	100,000	-	84,000,000	1,000,000	-	-	-
New Construction K-8/Clark and Lorraine	811,332	84,188,668	-	-	-	-	-
New Construction K-12 Magnet School North of Fruitvi	643,254	-	-	-	-	-	-
North Port High HVAC & Science Wing Refresh	-	-	-	59,020,000	-	-	-
Oak Park Special Olympics Track	-	-	3,500,000	-	-	-	-
Oak Park Wing Renovation	6,837,977	1,632,000	2,607,000	2,806,376	6,982,446	3,443,491	4,695,018
Pine View New Classroom Wing	13,254,019	-	-	-	-	-	-
Sarasota High Chiller Plant/HVAC Refresh (East Side)	-	21,050,000	16,450,000	-	-	-	-
Sarasota High Tennis Courts	-	500,000	-	-	-	-	-
Sarasota Middle Roof	-	-	-	-	-	-	500,000
School Site Purchases	9,186,908	-	7,960,000	-	-	11,850,000	3,950,000
SHS School Avenue Project (Project 3057)	2,579,656	-	-	-	-	-	-
STC COOP (Continuity of Operations)	1,800,000	1,400,000	-	-	-	-	-
STC Fire Science Academy Relocation	5,000,000	-	-	-	-	-	-
STC Renovation - Phase III	-	-	-	-	-	11,800,000	3,400,000
Venice High Locker Room/Equipment Bldg	2,200,000	-	-	-	-	-	-
Total Funded Projects	114,901,734	141,084,101	300,679,000	66,306,376	8,002,446	91,253,491	21,765,018
Total Recurring Exp. & Funded Projects	244,414,740	260,252,020	428,780,434	197,244,850	146,329,018	228,691,986	161,178,970
Ending Fund Balance	43,097,853	47,489,146	52,093,430	65,433,584	76,493,323	61,758,678	65,078,224
Required Capital Fund Reserve	(9,495,882)	(9,924,366)	(10,210,174)	(10,597,421)	(11,147,977)	(11,397,621)	(11,650,891)
Final Balance (Less Reserve)	33,601,971	37,564,780	41,883,256	54,836,163	65,345,346	50,361,057	53,427,333

18,826,120

3,247,660



April 12, 2022 Board Meeting
Agenda Item 8.

Title

ELEMENTARY PROGRESS MONITORING

Description

Recommendation

Contact

JOHNSON & ELLINGTON

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Progress Monitoring	4/5/2022	Cover Memo

Progress Monitoring and Problem Solving

Elementary Schools





Teacher Response

Refine Student Instruction

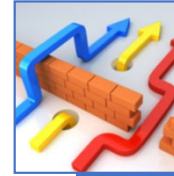
- Grade Level PLC examines common assessments to identify trends and respond – Will this help more students learn at higher levels?
- Review Data for Tier I Response
- Identify Small Group Instructional Targets for Tier 1
- Intervention Response



School Response

Refine Building System

- Leadership Team identifies school level trends in data
- Leadership Team responds to scheduling, staffing, professional learning and curriculum needs



District Response

Eliminating Barriers

- Elementary Curriculum Team identifies district trends and develops professional learning response
- Instructional Leadership ensures foundational elements are in place to support a robust Multi-Tiered System of Support

Aligning ELA Assessment & Practices.



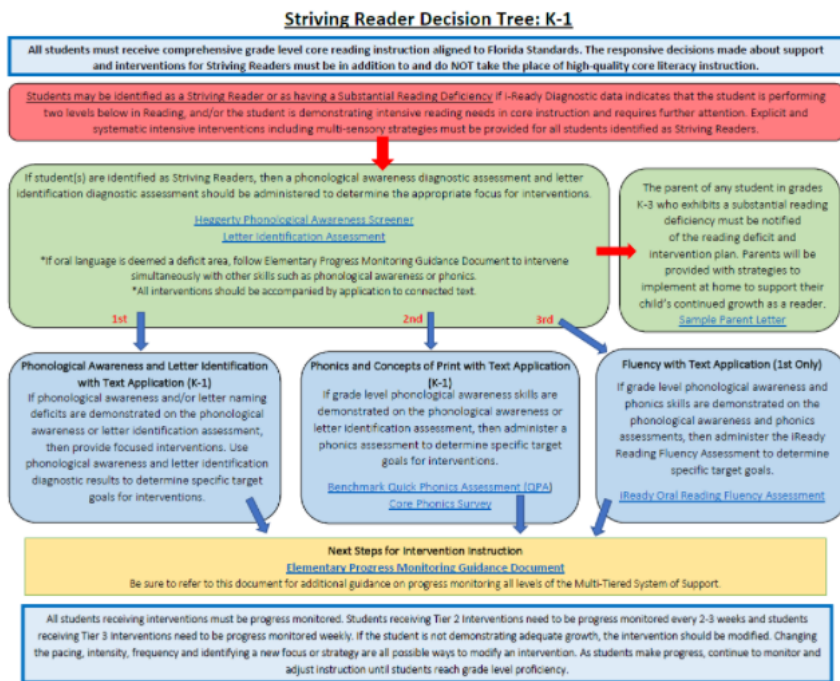
K-5 Universal Screener i-Ready Reading and Math

Kindergarten	1st Grade	2nd Grade	3rd -5th Grade
Phonemic Awareness	Phonemic Awareness	Phonics	Fluency
Phonics	Phonics	Fluency	Running Record
Concepts of Print	Fluency	Running Record	Reading Interim Assessment
Oral Language	Running Record	Reading Interim Assessment	Writing Interim Assessment
Running Record	Reading Interim Assessment	Writing Interim Assessment	
Reading Interim Assessment			

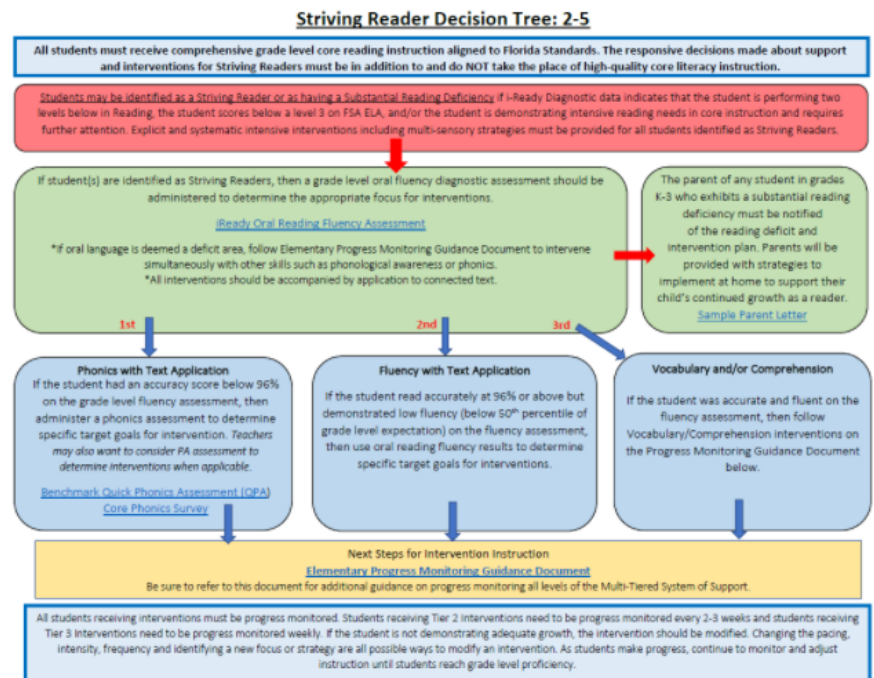
Grade 2 Tier I Targeted Progress Monitoring

Student Name	Phonics			Fluency			Running Record			Reading Interim Assessment*								Writing Interim Assessment*			i-Ready*					
	Beginning of Year	Mid-Year	End of Year	Beginning of Year	Mid-Year	End of Year	Beginning of Year	Mid-Year	End of Year	2				3				1	2	3	Reading			Math		
Date Range	Aug 10- Sept 3	Nov 8- Dec 10	May 2- May 27	Aug 10- Sept 3	Nov 8- Dec 10	May 2- May 27	Aug 10- Sept 3	Nov 8- Dec 10	May 2- May 27	Nov 8- Nov 12				Feb 14- Feb 18				Nov 8- Nov 12	Feb 14- Feb 18	May 23- May 27	Aug 16- Sept 3	Dec 1- Dec 21	May 2- May 20	Aug 16- Sept 3	Dec 1- Dec 21	May 2- May 20
Meeting Expectations Target	14	14	21	50 WCPM	84 WCPM	100 WCPM	J 18	K 20	M 28	Reading Lit 75%	Reading Info 70%	Foundational 80%	Editing 80%	Reading Lit 73%	Reading Info 71%	Foundational 80%	Editing 80%	2	3	3	AP1 460	AP2 489	AP3 505	AP1 402	AP2 418	AP3 434
% of Class Meeting Expectations																										
Student 1	6	1		11	47		B	D		56%	73%	30%	40%	50%	50%	60%	40%	0	1		392	405		369	373	
Student 2	8	4		43	66		G	J		56%	45%	60%	20%	92%	88%	80%	60%	1	2		427	454		403	413	
Student 3	9	10		70	94		I	L		78%	55%	50%	80%	75%	88%	80%	20%	1	2		457	488		400	428	
Student 4	12	15		83	119		L	N		88%	36%	80%	60%	92%	88%	80%	60%	3	2		494	520		422	449	
Student 5	14	9		58	85		D	H		56%	18%	70%	20%	25%	13%	90%	60%	1	1		401	436		378	405	
Student 6	14	11		58	85		J	m		56%	55%	100%	80%	75%	88%	90%	80%	3	3	Meeting Expectations						
Student 7	2	0		0	7		B	c		56%	27%	60%	40%	25%	25%	20%	40%	0	1	Watch Zone						
Student 8	0	3		2	13		B	d		25%	27%	90%	20%	50%	25%	80%	20%	1	1	Problem Solving						
Student 9	13	14		94	120		I	m		89%	27%	50%	60%	75%	50%	60%	100%	2	2	Problem Solving						
Student 10	10	11		57	90		K	m		67%	0%	70%	40%	67%	75%	80%	20%	2	2	Problem Solving						
Student 11	15	13		62	83		I	l		33%	27%	90%	60%	67%	75%	80%	60%	1	3	Problem Solving						
Student 12	15	14		117	131		K	n		89%	45%	80%	20%	92%	88%	90%	80%	2	3	Problem Solving						
Student 13	14	15		97	129		M	n		78%	55%	70%	80%	92%	75%	100%	60%	2	3	Problem Solving						
Student 14	5	4		16	41		F	l		50%	9%	50%	60%	100%	88%	100%	80%	2	2	Problem Solving						
Student 15	11	12		82	119		K	L		67%	55%	60%	60%	75%	75%	100%	20%	1	3	Problem Solving						
Student 16	0	0		0	5		A	A		33%	9%	70%	40%	25%	56%	60%	40%	0	1	Problem Solving						
				Decision Trees: Before beginning any intervention, please utilize the Decision Trees to ensure proper placement, identification of target skill and suggested resources.																						

K-1 STRIVING READER DECISION TREE



2-5 STRIVING READER DECISION TREE



LEVEL 1

Reading Component or Strand	Name of Assessment to Pinpoint Deficit	Assessment Type	To Whom is the assessment administered?	Criteria to Move to Tier 2 or Tier 3 Interventions	Suggested Interventions		Progress Monitoring Tool
					Tier 2	Tier 3	
Phonological Awareness	Heggerty Phonological	Screeners	<u>Kindergarten:</u>	If students fall in the	Small group	Benchmark	Portions of
Oral Language	Mondo Oral Language	Screeners	<u>Kindergarten:</u> Every student mid-	<u>Kindergarten:</u> At mid-year, the	Intentional Use of One-to-One	Intervention to be determined	
Letter Identification	Letter Identification Assessment	Screeners	<u>Kindergarten:</u> All students by mid-year	<u>Kindergarten:</u> If the student knows less than 40 letters, upper and lower	Phonics Skill Bags: Start Up Kit Lessons for Letter	Targeted instruction the spe letters	
Phonics	Benchmark	Screeners	<u>Grades K-5:</u>	If the student scores less than 80% on	Benchmark Advance Phonics Skill Bags: Start Up, Build Up.	Benchmark Advance	
Fluency	i-Ready Oral Reading Fluency Assessment	Screeners	<u>Grades K-5:</u> If i-Ready diagnostic data indicates that	<u>Grades K-5:</u> If the student scores below the 50 th	Double Dose of targeted Fluency Routines from Benchmark	Benchmark Advance	i-Ready Oral Reading Fluency Normatives at
Vocabulary	i-Ready Diagnostic	Diagnostic	<u>K-5:</u> If i-Ready diagnostic data indicates that the	<u>K-5:</u> If i-Ready diagnostic data indicates that the	Double Dose of Benchmark	ACT Now Comprehension	Determine the meaning of Tier 2
Comprehension	i-Ready Diagnostic	Diagnostic	<u>Grades K-5:</u> If i-Ready diagnostic data indicates that the student is performing two levels below in Reading, and/or the student is demonstrating intensive reading needs in core instruction and requires further attention in the area of Comprehension . *These students have proven a deficit	<u>K-5:</u> If i-Ready diagnostic data indicates that the student is performing two levels below in Reading, and/or the student is demonstrating intensive reading needs in core instruction and requires further attention in the area of Comprehension. These students have proven a deficit has	Path 1: Overall Comprehension Leveled Literacy Intervention-LLI (done in addition to small group reading instruction that occurs in Tier 1) *If available at school sites. Path 2: Standards/Skill Based Instruction Benchmark Advance Targeted Intervention for Comprehension connected to Tier 1 whole-group instruction, and can	ACT Now Comprehension connected to Tier 1	Path 1: Comprehension Retell Of a grade passage (c Narrative Re Non-Ficti Rub Path 2: Stan Based Ins Bench Advance Check Compreh ACT Nov

Targeted Intervention
Guidance
by Domain

Take a closer look!



and interventions for Striving Readers must be in addition to and do NOT take the place of high quality core literacy instruction.

Students may be identified as a Striving Reader or as having a Substantial Reading Deficiency if i-Ready Diagnostic data indicates that the student is performing two levels below in Reading, the student scores below a level 3 on FSA ELA, and/or the student is demonstrating intensive reading needs in core instruction and requires further attention. Explicit and systematic intensive interventions including multi-sensory strategies must be provided for all students identified as Striving Readers.

If student(s) are identified as Striving Readers, then a grade level oral fluency diagnostic assessment should be administered to determine the appropriate focus for interventions.

iReady Oral Reading Fluency Assessment

- If oral language is deemed a deficit area, follow Elementary Progress Monitoring Guidance Document to intervene simultaneously with other skills such as phonological awareness or phonics.
- All interventions should be accompanied by application to connected text.

The parent of any student in grades K-3 who exhibits a substantial reading deficiency must be notified of the reading deficit and intervention plan. Parents will be provided with strategies to implement at home to support their child's continued growth as a reader.

[Sample Parent Letter & Read At Home Plan](#)

1st

2nd

3rd

Phonics with Text Application

If the student had an accuracy score below 96% on the grade level fluency assessment, then administer a phonics assessment to determine specific target goals for intervention. *Teachers may also want to consider PA assessment to determine interventions when applicable.*

[Benchmark Quick Phonics Assessment \(QPA\)](#)
[Core Phonics Survey](#)

Fluency with Text Application

If the student read accurately at 96% or above but demonstrated low fluency (below 50th percentile of grade level expectation) on the fluency assessment, then use oral reading fluency results to determine specific target goals for interventions.

Vocabulary and/or Comprehension

If the student was accurate and fluent on the fluency assessment, then follow Vocabulary/Comprehension interventions on the Progress Monitoring Guidance Document below.

Next Steps for Intervention Instruction

[Elementary Progress Monitoring Guidance Document](#)

Be sure to refer to this document for additional guidance on progress monitoring all levels of the Multi-Tiered System of Support.



Elementary Progress Monitoring Guidance Document

Sarasota County Schools

2021-2022

Reading Component or Strand	Name of Assessment to Pinpoint Deficit	Assessment Type	To Whom is the assessment administered?	Criteria to Move to Tier 2 or Tier 3 Interventions	Suggested Interventions		Progress Monitoring Tools
					Tier 2	Tier 3	
Comprehension	i-Ready Diagnostic	Diagnostic	<u>Grades K-5:</u> If i-Ready diagnostic data indicates that the student is performing two levels below in Reading, and/or the student is demonstrating intensive reading needs in core instruction and requires further attention in the area of <i>Comprehension</i> .	<u>K-5:</u> If i-Ready diagnostic data indicates that the student is performing two levels below in Reading, and/or the student is demonstrating intensive reading needs in core instruction and requires further attention in the area of <i>Comprehension</i> . These students have proven a deficit has not been noted in Phonics, Fluency, and/or Phonological Awareness.	Path 1: Overall Comprehension Leveled Literacy Intervention-LLI (done in addition to small group reading instruction that occurs in Tier 1) *If available at school sites.	ACT Now Comprehension connected to Tier 1	Path 1: Overall Comprehension Retell Rubric Of a grade-level passage (cold read) Narrative Retell Rubric
	Running Records	Progress Monitoring			Path 2: Standards/Skill Based Instruction Benchmark Advance Targeted Intervention for Comprehension connected to Tier 1 whole-group instruction. and can be paired with multi-sensory instructional strategies from Reading Excellence Website		Non-Fiction Retell Rubric Path 2: Standards/Skill Based Instruction Benchmark Advance Quick Checks for Comprehension ACT Now Wrap Up/Check your Understanding
	Benchmark Advance Interim Assessments		*These students have proven a deficit has not been noted in Phonics, Fluency, and/or Phonological Awareness.				

Grade 2 Comprehension Intervention

Introduction Lessons at a Glance

Lesson 1: Ask Questions about Literary Text

Lesson 2: Answer Questions about Literary Text

Lesson 3: Retell the Story

Lesson 4: Identify and Explain Theme

Lesson 5: Describe How Characters Respond

Lesson 6: Identify and Explain Alliteration

Lesson 7: Identify Rhyme Scheme

Lesson 8: Identify and Explain Similes

Lesson 9: Describe Beginnings of Stories

Lesson 10: Describe Endings of Stories

Lesson 11: Identify Plot Structure



Lesson Objectives

- Students will ask questions about a story.
- Students will show their understanding of key details in a story.

Metacognitive Strategy

- Monitoring comprehension
- Note-taking

Academic Language

- labor

Additional Materials

- BLM 1, Mother Jones Comes to Town
- BLM 2, Ask Questions about Literary Text graphic organizer

Ask Questions About Literary Text

State Learning Goal

Tell students that the focus of today's lesson is to understand key details in a story.

Say: Today we're going to learn how to ask questions about a story. We will ask questions in the story.

BLACKLINE MASTER 1

Write the

We can

story. The

We call

Introduct

Say: The

BLACKLINE MASTER 2

Mother Jones Comes to Town

- 1 It was still dark when Ann's mother woke her. She moaned.
- 2 "I know it's hard," her mother said. "But it's a big day! Mother Jones is coming!"

Name _____ Date _____

Mother Jones Comes to Town

Ask Questions About Literary Text

Who?

What?

When?

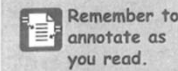
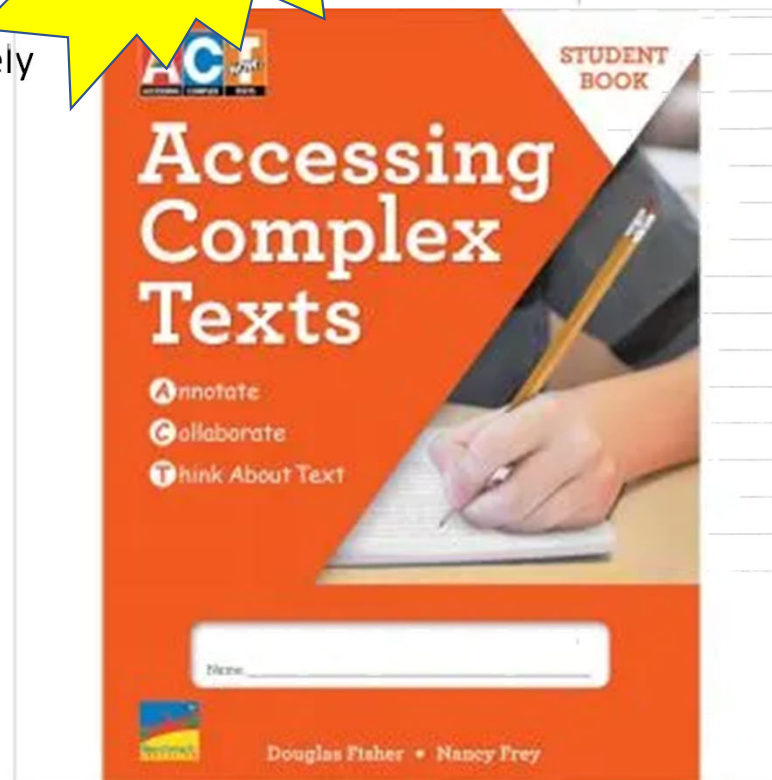
Where?

ACT Now!

Reading and Response Tools from Literacy Experts Fisher & Frey

- Annotating complex text is explicitly taught and effectively practiced.
- Collaborative conversations develop understanding and clarify thinking.
- Writing to sources enables students to create evidence-based answers.

Tier 3



Notes

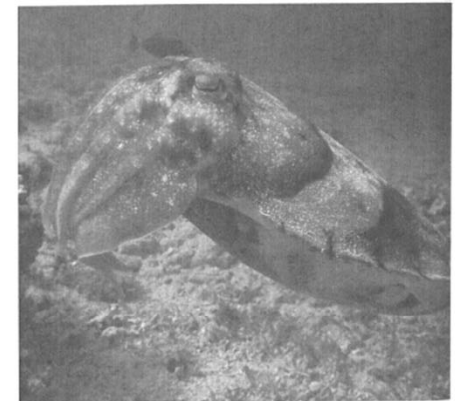
Passage 2

Unit 2 • Animals

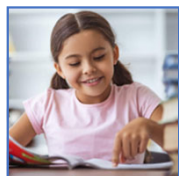
Cunning Cuttlefish

Cuttlefish are unusual animals. For starters, their blood is blue-green and they have three hearts. Their eyes are shaped like Ws. They have eight arms and two tentacles that spring from their head.

The cuttlefish name is misleading. A cuttlefish is not a fish at all. It is a mollusk. Think snail, slug, or clam. Millions of years ago, the cuttlefish had a hard shell, which provided protection from predators. But the cuttlefish has evolved into a soft-bodied animal. Today it has other ways to stay safe.



This is the pharaoh cuttlefish (*Sepia pharaonis*).



Teacher Response

Refine Student Instruction

- Grade Level PLC examines common assessments to identify trends and respond – Will this help more students learn at higher levels?
- Review Data for Tier I Response
- Identify Small Group Instructional Targets for Tier 1
- Intervention Response



School Response

Refine Building System

- Leadership Team identifies school level trends in data
- Leadership Team responds to scheduling, staffing, professional learning and curriculum needs



District Response

Eliminating Barriers

- Elementary Curriculum Team identifies district trends and develops professional learning response
- Instructional Leadership ensures foundational elements support a robust Multi-Tiered System of Support



April 12, 2022 Board Meeting
Agenda Item 9.

Title

NEW CHARTER SCHOOL APPLICANT

Description

Recommendation

Contact

CANTALUPO & WHEELER

Financial Impact

ATTACHMENTS:

Description	Upload Date	Type
Table of Contents	4/5/2022	Cover Memo
CRC Overview	4/5/2022	Cover Memo
CPAWP Initial Application Evaluation	4/5/2022	Cover Memo
Clay Charter Academy	4/5/2022	Cover Memo
Preliminary Site Plan	4/5/2022	Cover Memo
CPA-WP Distance to Area Schools & Sites	4/5/2022	Cover Memo

**Preliminary Review for
College Preparatory Academy at Wellen Park**

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Please NOTE: These are Five Separate Documents with Individual Numbering

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 Clay County School District Review of Clay Charter Academy (School to be Replicated)

 Preliminary Site Plan-Charter School USA for Proposed New Sarasota Charter

 10 Mile Radius Area Traditional Schools, SCS School Sites and Charter Schools

**Complete Charter Application is 535 pages and available upon request.*

Sarasota County Schools
2021 – 2022 Charter School Application Process
Preliminary Review Summary – April 12, 2022

College Preparatory Academy at Wellen Park
Application for a High-Performing Charter Replication

On February 1, 2022, the district received the application from the Florida Charter Educational Foundation, Inc. to replicate a high-performing charter school pursuant to s. 1002.331, F.S. The applicant must provide evidence that the proposed school meets the statutory requirements of being a substantially similar replication of the high-performing school and evidence that the organization or individuals involved in the establishment and operation of the proposed school are significantly involved in the operation of the high-performing school that is being replicated.

- The high-performing charter school to be replicated is the Clay County Academy school located in Middleburg, Florida.
- The proposed school model proposes to provide students with a college and career readiness education in an equitable manner through rigorous academics and experiential learning.
- The proposed school plans to open in 2023-24 with an enrollment of 615 K-8 students in year one and increase to 765 students by year 5.
- The applicant proposed that the school will be in the developing Wellen Park area, a master-planned community located along Florida’s Gulf Coast in Sarasota County.
- The applicant proposes to hire an Educational Service Provider (ESP), Charter School USA, to provide comprehensive education services and business management services to the school via a management contract with the school’s governing board.

The district Charter Review Committee (CRC) followed the evaluation criteria specified in the 2019 *Florida Charter School Application Evaluation Instrument* and based their determination on the applicant’s proposed educational, organization, and business plans as described throughout the state-required *Model Florida Charter School Application* and in reference to the existing Clay Charter Academy as the school to be replicated.

A summary of the CRC’s initial ratings by program area is provided on page 4 of this document. On pages 5 and 6, the *Initial Ratings* chart provides separate ratings for each of the 22 standards as well as for the High-Performing Replication standards and ESP standards.

A separate and comprehensive report, the CRC *Analysis of Application and Initial Findings, April 5, 2022*, reflects the CRC’s preliminary findings and ratings following state’s evaluation tool format. The results are divided into three categories: 1) Strengths, 2) Concerns and 3) Questions. The CRC is offering the applicant an opportunity to address the “Concerns” and “Questions” and respond by April 13, 2022. However, **this clarification process may not be used to submit any new information which has not been requested or make substantive changes to the submitted application.**

It is important to note that a summary of charter school statute, other statutes and rules pertaining to the sections in the CRC Analysis were included so the reader can better understand why a concern is mentioned. Some concerns are mentioned in more than one section as it may be applicable to several.

During the April 12 School Board Work Session, the school’s governing board will meet with the School Board to discuss the application and the preliminary review findings. The applicant will also have the opportunity to participate in the CRC Capacity Interview on April 20, 2022, to discuss any unresolved issues and to corroborate the information in the application. Subsequently, the CRC will complete the evaluation and determine final evaluation ratings. The School Board will act to approve or deny the application at the June 7, 2022, Sarasota County School Board meeting.

High-Performing Replication Application

- 1002.331 High-performing charter schools. —
 - (1) A charter school is a high-performing charter school if it:
 - (a)1. Received at least two school grades of “A” and no school grade below “B,” pursuant to s. 1008.34, during each of the previous 3 school years or received at least two consecutive school grades of “A” in the most recent 2 school years for the years that the school received a grade; or
 - 2. Receives, during its first 3 years of operation, funding through the National Fund of the Charter School Growth Fund, and has received no school grade lower than a “C,” pursuant to s. 1008.34, during each of the previous 3 school years for the years that the school received a grade.
 - (b) Received an unqualified opinion on each annual financial audit required under s. 218.39 in the most recent 3 fiscal years for which such audits are available.
 - (c) Did not receive a financial audit that revealed one or more of the financial emergency conditions set forth in s. 218.503(1) in the most recent 3 fiscal years for which such audits are available. However, this requirement is deemed met for a charter school-in-the-workplace if there is a finding in an audit that the school has the monetary resources available to cover any reported deficiency or that the deficiency does not result in a deteriorating financial condition pursuant to s. 1002.345(1)(a)3.
 - (3)(a)1. A high-performing charter school may submit an application pursuant to s. 1002.33(6) in any school district in the state to establish and operate a new charter school that will substantially replicate its educational program. An application submitted by a high-performing charter school must state that the application is being submitted pursuant to this paragraph and must include the verification letter provided by the Commissioner of Education pursuant to subsection (4).
- FLDOE verified that Clay County Academy meets the criteria for high-performing charter school status pursuant to F.S. 12002.331 in a letter dated 08/14/2019. (505)

Proposed Charter Oversight and Management

The operations and business plan for the proposed Sarasota school is different than all current Sarasota Charter Schools. The Florida Charter Education Foundation (FCEF), located in Fort Lauderdale, is applying for the charter. FCEF will be responsible for developing and outlining the mission, vision, and values of College Preparatory Academy at Wellen Park (CPAWP); developing the appropriate policies to ensure those fundamentals are maintained; and effectively and properly managing public funds. It is important to note that the FCEF will not be involved in the daily management of the school. FCEF members will serve as the Board of Directors for the proposed charter school.

As indicated in the application FCEF’s primary role is to:

- Determine and preserve the organization’s mission and vision
- Create and oversee the organization’s operational policies
- Exercise continuing oversight over charter school operations
- Ensure effective organizational planning
- Ensure adequate resources, finances, and fiscal propriety
- Manage resources effectively (adopt and monitor budget and financials)
- Determine, monitor, and strengthen programs and services
 - Assure programs and services are consistent with the mission
 - Assess the quality of programs and services
- Ensure charter compliance
- Enhance public standing
- Ensure legal and ethical integrity and maintain academic and financial accountability
- Understand laws applicable to charter school board members
- Recruit and orient new board members and assess board performance

- Monitor school academic performance and ensure adequate progress is made
- Select ESP
- Perform operational oversight of the ESP
- Attending training and conferences regularly

Education Service Provider (ESP)

- 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.
- FCEF indicated that they did not have enough manpower or resources to market and operate a school of this size independently. They hired Charter Schools USA (CSUSA), a for-profit ESP, to manage day-to-day charter school operations.
- CSUSA currently manages 60 schools in Florida within 14 school districts.
- FCEF is the governing body for 11 charter schools in Florida. All are managed by CSUSA.
- CSUSA plans to grow its network of schools incrementally over the next five years. CSUSA will support its governing boards by submitting two applications in the state of Florida this year. Over the next five years, CSUSA expects to submit a similar number of applications each year both in and outside the state of Florida. In addition, CSUSA is currently scheduled to open one new school in the state of Florida for the upcoming 2022-23 year, and one new school in other states where they operate. Over the course of the next five years, CSUSA plans to open approximately ten new schools.
- The application indicated that CSUSA will be providing the following services for the proposed charter school:
 - 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 indicated that they may enter into other financial agreements outside of the management contract with CSUSA. These agreements may include other capital items such as technology.
- Although the FCEF presented a Code of Ethics and Conflict of Interest Policy, given the extent of the ESP services and the strong relationship between the ESP organization and FCEF, any other agreements with the ESP or its affiliates are a concern.

Sarasota County Schools
2021-2022 Charter School Application Process
Charter Review Committee (CRC) Preliminary Ratings – Summary

Applicant: College Preparatory Academy at Wellen Park

I. Educational Plan Standards 1 – 9	II. Organizational Plan Standards 10 – 15	III. Business Plan Standards 16 – 22
18% Meets 82% Partially Meets 0% Does Not Meet	21% Meets 79% Partially Meets 0% Does Not Meet	20% Meets 61% Partially Meets 18% Does Not Meet
Addendum A1: High-Performing Replication	Addendum B: Education Service Providers	Preliminary Total
0% Meets 80% Partially Meets 20% Does Not Meet	75% Meets 25% Partially Meets 0% Does Not Meet	20% Meets 74% Partially Meets 6% Does Not Meet

Sarasota County Schools
2021-2022 Charter School Application Process
Charter Review Committee (CRC) Preliminary Ratings - Detail

Applicant: College Preparatory Academy at Wellen Park

Charter School Application Section	Preliminary CRC Rating	Final CRC Rating
I. Educational Plan	18% Meets 82% Partially Meets 0% Does Not Meet	% Meets % Partially Meets % Does Not Meet
1. Mission, Guiding Principles and Purpose	Partially Meets	
2. Target Population and Student Body	Partially Meets	
3. Educational Program Design	Partially Meets	
4. Curriculum Plan	Partially Meets	
5. Student Performance, Assessment and Evaluation	Partially Meets	
6. Exceptional Students	Partially Meets	
7. English Language Learners	Partially Meets	
8. School Culture and Discipline	Partially Meets	
9. Supplemental Programming	NA	
II. Organizational Plan	21% Meets 79% Partially Meets 0% Does Not Meet	% Meets % Partially Meets % Does Not Meet
10. Governance	Meets	
11. Management and Staffing	Partially Meets	
12. Human Resources and Employment	Partially Meets	
13. Professional Development	NA	
14. Student Recruitment and Enrollment	Partially Meets	
15. Parent and Community Involvement	NA	

III. Business Plan	20% Meets 61% Partially Meets 18% Does Not Meet	% Meets % Partially Meets % Does Not Meet
16. Facilities	Partially Meets	
17. Transportation	Does Not Meet	
18. Food Service	Partially Meets	
19. School Safety and Security	Partially Meets	
20. Budget	Partially Meets	
21. Financial Management and Oversight	Meets	
22. Start-Up Plan	Partially Meets	
Addenda		
Addendum A1: High-Performing Replication	Partially Meets	
Addendum B: Education Service Providers	Meets	
Ratings Summary – All Standards (1-24)	20% Meets 74% Partially Meets 6% Does Not Meet	% Meets % Partially Meets % Does Not Meet

Due to rounding table percentages may not add to 100%

Note: Preliminary ratings are based on CRC’s review of the February 1, 2022 charter application. Final ratings are based on the evaluation of the initial application together with the applicant’s written response (Due April 13, 2022) to the *CRC Analysis and Initial Findings* report and the April 20, 2022, Clarification /Capacity Interview.

I. Educational Plan

The education plan should define what students will achieve, how they will achieve it, and how the school will evaluate performance. It should provide a clear picture of whata student who attends the school will experience in terms of educational climate, structure, assessment and outcomes.

- Mission, Guiding Principles and Purpose

The Mission, Guiding Principles and Purpose section should indicate what the school intends to do,for whom and to what degree.

Statutory References:

s. 1002.33(2)

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The vision and mission highlight a focus on college readiness and student success.• The applicant has provided the High Performing Verification Letter from the Commissioner of Education to document its application replication status required by F.S. 1002.331		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The school’s Mission and Vision are not clear and compelling and NOT unique. SCS (Sarasota County Schools) reviewers cannot understand how the applicant defines college and career readiness and student success. (3)		

<ul style="list-style-type: none"> • According to state statute a charter school should encourage the use of <i>“innovate learning methods and expand the capacity of the public school system.”</i> The applicant indicates that CPAWP’s Mission and Vision is shared with the school being replicated, Clay Charter Academy (CCA). • Two concerns regarding the above: <ul style="list-style-type: none"> ○ The SCS Review Committee does not understand how the Mission and Vision would not apply to every US School. A tangible description of innovation and capacity expansion is needed. (3) ○ CCA mission does not address or align with College and Career Readiness. No Vision statement could be located for Clay County Charter Academy. (3) 		
Questions	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none"> • How does the applicant define college and career readiness? • Which specific courses will be offered that are directly aligned to college and career readiness goal? • Which FLDOE and CareerSource Florida recognized industry certifications or credentials will students have the opportunity to earn? • What are the applicant’s plans for local employer engagement? • Will CPAWP offer the same courses as CCA? 		

- **Target Population and Student Body**

The Target Population and Student Body section should describe the anticipated target populationof the school and explain how the school will be organized by grade structure, class size and total student enrollment over the term of the school’s charter.

Statutory Reference(s):

s. 1002.33(10)

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

Strengths	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• The applicant attempted to capture key demographics of surrounding schools. (5)• The applicant noted they will comply with F.S. 1002.31 Controlled Open Enrollment (5)		
Concerns	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• The proposed school is to be built in Wellen Park, a master planned community in North Port. Real Estate listings in this community range from the mid-300,000 range to well over one million dollars. The Free and Reduced Lunch (FRL) percentage projection for this school is unlikely to be 52%, and therefore will not reflect the percentage in the surrounding schools mentioned in the application, which range from 32% FRL to 74% FRL. (5)• The surrounding schools provided in the application within the 15-minute drive reflect other public schools that may be impacted by a new school in this area. (5)		

- Although the demographics of 8 schools are used to project the demographics of the proposed charter, only Taylor Ranch and Venice Middle School are within 5 miles of the school. These two non-charter schools will be impacted disproportionately. (5)

- The replication charter has a different demographic profile than the proposed charter. The Charter to be replicated is comprised of 49% minority students while CPAWP is projected for 28% a 21% difference. Also, FRL at 36% for CCA and 52% for CPAWP is a –16% difference. This is a different demographic than surrounding schools and the proposed charter. (5;122)

School	FRL	Minority	ELL	ESE	ESE + Gifted Total
CPAWP	52%	28%	5%	18%	23%
CCA	36%	49%	3%	20%	26%
Difference:	<u>-16%</u>	<u>21%</u>	<u>-2%</u>	<u>2%</u>	<u>3%</u>

- Although similar in percent ELL and ESE, the SCS schools differ on FRL and ethnicity representation

School	FRL	White	Black	Hispanic
CPAWP*	35%-79%	60%-78%	0% - 9%	10%-24%
CCA**	36%	40%	27%	25%

*Sarasota data based on Survey 3, ranges for schools identified by the applicant on page 5 of the application.
 **CCA Data from FLDOE

- The projected enrollment fluctuates without explanation. For example, Grade 1,2 loses two students from SY 23-24 to SY24-25. Grade 6 loses 20 in SY 24-25 and grade 7 loses 20 in SY 25-26. (6)

- The student enrollment to staff ratios as listed in this application don't appear to meet FLDOE class size requirements. For example, as presented, the school would be over in K-3 grade span (21.59) and in grades 4-8 (22.64). Per formal records request, the Charter Review Committee (CRC) discovered two FCEF schools in Hillsborough County that were out of compliance with FLDOE class-size requirements in SY 20-21. (6)

Year	1	2	3	4	5
Grade	2023-24	2024-25	2025-26	2026-27	2027-28
Total K-3 Classrooms	17	17	17	17	17
Total K-3 Students:	366	360	360	360	360
K-3 Class Size Average:	21.53	21.18	21.18	21.18	21.18

Year	1	2	3	4	5
Grade	2023-24	2024-25	2025-26	2026-27	2027-28
Total 4-8 Classrooms	11	14	17	17	17
Total 4-8 Students:	249	330	405	405	405
4-8 Class Size Average:	22.64	23.57	23.82	23.82	23.82

- The SCS has a K-8 funded in the Five-Year Work Plan planned to open 2025-26 located within 1.5+/- miles (as the crow flies) from the potential location of CPAWP which will impact CPAWP Targeted Population and Student Body.
- The Charter Application denotes a projected enrollment of 765 students by year 5, but the Site Application filed with the City of North Porth Port cites a “K-8 Charter School for 960 students.” (6; CNP Site Plan Application))

<ul style="list-style-type: none">• The applicant did not provide an explanation of the alignment between the target population and the overall mission of the school.		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• Explain why there are increases and decreases in projected enrollment as the cohort moves up the grade levels.• CCA site appears to have different demographics than the proposed replication charter. How will this alter programming if at all?		

- **Educational Program Design**

The Educational Program Design section should describe the educational foundation of the school and the teaching and learning strategies that will be employed.

Statutory Reference(s):

s. 1002.33(7)(a)2.

Evaluation Criteria:

A response that meets the standard will present an educational program design that:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• The applicant appears to have a strong Educational Model including the continuous improvement framework and systems of support built into the master schedule to provide remediation/enrichment for individual students. They are using research based instructional models and appear to have a focus on improving literacy for all. (8-18)• SCS supports the 30-minute Success Block built-in to the master schedule to provide targeted remediation and intervention. (12)• Sarasota County Schools (SCS) supports the scheduled 120 minutes of ELA instruction and 90-minute block of math. (20, 22)• These levels of support show their commitment to providing additional instructional time including intervention and tutoring to close reading deficiency gaps. (34)		

Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• Are the tutoring groups designed to have 15 students with one teacher? If all 15 are struggling, a more effective strategy would be to have a smaller teacher-to-student ratio. The application described tutoring more like a whole class strategy, which does not fit with intensive intervention. (17-18)• Throughout the teaching and learning cycle narrative, the application reports several activities that ‘may’ occur. Since this is a replication, the plan should be more definitive. For example, CPAWP may use: the Chalk Lesson Learning Platform; may incorporate SEL into instructional periods; teachers may use pre-recorded lessons. (10-14) The Clay County District charter authorizer recently conducted an annual site visit to Clay Charter Academy, the school proposed to be replicated in Sarasota. Per formal records request, the CRC discovered that the site visit uncovered concerns regarding CCA’s reading instruction:<ul style="list-style-type: none">○ “During classroom visits, the evidence-based reading program was observed as present in the classroom and portions of the lesson were referenced on the board. However, the student materials from the curriculum were not being utilized. The materials observed in use by students were “worksheet packets” and online programs (e.g., ABC Mouse)”○ “Evidence-based supplemental reading intervention materials are listed in the CCUSA-Clay Reading plan. However, evidence of the use of these materials was not present during the walkthrough. The sample lesson plans, and the “Small Groupings PDF” do not provide documentation that these materials are being implemented.”○ There is “Minimal evidence of the core ELA programs outlined in the 2021-2022 CCA Reading Plan is being implemented on a consistent basis: Packets of handouts containing items from multiple sources not aligned with the adopted core instructional materials, students using materials and resources from past adopted curriculum in K-2 (Wonders) (TPT)”		

<ul style="list-style-type: none"> ○ “Adopted core curriculum was observed to be in classrooms, but not being used as outlined on the Teacher Curriculum List in the CCA Submission Folder.” ○ “An overreliance of technology and digital materials: students were observed interacting with the digital curriculum but could not articulate the purpose of doing so when questioned other than it is what they are told to do or they have to complete so many minutes, some students were accessing other sites while others were drawing or coloring and not engaged in the online learning content.” (Site Visit Documentation) • In grades K-4, only weekly minutes are listed for Science Instruction, which alludes to non-daily instruction. Science instruction should be occurring daily. (22,23) • Only 20 minutes of daily PE scheduled on the sample K-5 schedule, which does not add up to the required 150 min/week per FS 1003.455. (30,31,138) • There is no allotted time on the sample schedule for the 20/day of required recess for grades K-5 per FS 1003.455. (30,31,138) 		
Questions	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none"> • “Lessons learned from CCA’s successful implementation will guide CPAWP’s efforts in planning and delivery of the educational program and purposeful collaboration sessions with CCA’s leadership team will support CPAWP’s critical first years.” What were the lessons learned? Please specify those lessons and how FCEF changed the approach to align with the mission. (8) • What exact strategies covered in the Education Plan will definitively be operational in the proposed replication charter school? • The CCA review revealed that the educational design was not being implemented effectively. Although the design in this application had merit, how will the applicant ensure that the instructional deficiencies in CCA will not be replicated in CPAWP? 		

- Curriculum Plan

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

Statutory Reference(s):

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

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

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• Sarasota County Schools (SCS) supports the scheduled 120 minutes of ELA instruction and 90-minute block of math. (20, 22)• These levels of support show their commitment to providing additional instructional time including intervention and tutoring to close reading deficiency gaps. (34)		
Concerns	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• The application is limited in detail regarding advanced coursework and acceleration in alignment with their CCR mission. (19)• The AVID curriculum has a strong college approach. Only one AVID course appears to be related to college and career courses. (31)• In grades K-4, only weekly minutes are listed for Science Instruction, which alludes to non-daily instruction. Science instruction should be occurring daily. (22,23)		

<ul style="list-style-type: none"> • Only 20 minutes of daily PE scheduled on the sample K-5 schedule, which does not add up to the required 150 min/week per FS 1003.455. (30,31,138) • There is no allotted time on the sample schedule for the 20/day of required recess for grades K-5 per FS 1003.455. (30,31,138) 		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • How will CPAWP be providing the state required career instruction? FLDOE requires that middle school students complete a career exploration course. How will the applicant meet this requirement? • Provide more detail regarding meeting patterns and instructional minutes to meet all the instructional requirements. • Which career courses will you provide to ensure ALL students have success in alignment with your mission? • Which high school credit courses are you offering for middle school acceleration, and are any of them CTE and in alignment with your mission? 		

- **Student Performance, Assessment and Evaluation**

The Student Performance, Assessment and Evaluation section should define what students attending the school should know and be able to do and reflect how the academic progress of individual students, cohorts over time, and the school will be measured.

Statutory Reference(s):

s. 1002.33(6)(a)3.; s.1002.33(7)(a)3.; s.1002.33(7)(a)4.; s.1002.33(7)(a)5.

Evaluation Criteria:

A response that meets the standard will present:

- An understanding of academic accountability provisions and goals mandated by the state.
- An indication that the applicant will hold high expectations for student academic performance.
- Measurable goals for student academic growth and improvement.
- Promotion standards that are based on high expectations and provide clear criteria for promotion from one level to the next, and for graduation (if applicable).
- Evidence that a range of valid and reliable assessments will be used to measure student performance.
- A proposed assessment plan that is sufficient to determine whether students are making adequate progress.
- Evidence of a comprehensive and effective plan to use student achievement data to inform decisions about and adjustments to the educational program.
- Plans for sharing student performance information that will keep students and parents well informed of academic progress.
- Acknowledgement of and general plan to meet FERPA requirements.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The applicant indicates knowledge of the existing Florida Accountability System and recognizes that these will change as the BEST Standards and FAST assessment program is introduced.• The applicant used SMART goals in alignment with the current Florida Accountability System.• The areas outlined in the Data Security Plan on page 47 look appropriate and in alignment with the best practices in the industry.		

Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">Although it is recognized that the exact calculations of proficiency in the new Florida Accountability System are not known at this time:<ul style="list-style-type: none">The proposed 10% reduction of those not reaching proficiency in ELA, Mathematics, Science and Social Studies is extremely ambitious.The proposed 10% increase in those earning learning gains in ELA and Mathematics is extremely ambitious.Additionally, the second option written for the above goals is that if the proposed school does not meet a 10% reduction or increase, it will perform better than demographically comparable schools. This same comparative goal is stated for all other components of school grade for the proposed school. SCS understanding of goal setting is that it is uniquely tied to academic programming. If CPAWP is a proposed to be a charter offering unique programming to Sarasota County, why would goal setting be in comparison to other schools in a norm based fashion? These goals should be set in a criterion fashion estimated to set targets for students resulting from the success of the proposed charter's programming. (38-40)The Mission related goals listed about college and career are inconsistent with the electives noted on Page 31 where AVID is mentioned only as a potential elective. (31)All Vision related goals are process and NOT outcome goals. These are much easier to achieve as they indicate they would enroll students in specific courses, instructional programming, and register them for conferences. Since the school's mission relates to college and careers, these goals should be outcome driven to measure the achievement of students in these areas. (42)		

<ul style="list-style-type: none">• The applicant listed several interim assessments that MAY be given several times a year to monitor progress: I-Ready, NWEA MAP, USA Test Prep, in addition to Instructional Focus Assessments, Quarterly Assessments. The list is flexible, noting that the school MAY do some assessments at various times in lieu of others. For the CRC to understand this, it would have been clearer to provide a standardized schedule that WILL be used at the school and be reflective of the replicated school to the greatest extent. (Attachment F, 265)• The applicant listed assessments for grade levels they will not be serving. (Attachment F, 265)• The applicant lists Digital Information Technology (DIT) as an MS Acceleration course. SCS no longer offers this course as the MOS Industry Certifications associated with DIT are no longer eligible for acceleration. Also, DIT is not a standalone course, but the first course in a CTE pathway. The intent of CTE is to complete entire pathways towards career readiness. (43)• In addition, the applicant also lists Biology and US History which are also not offered at the MS level within SCS. Although the charter can offer different courses as desired, this will be out of alignment with SCS course offerings rendering transfer and assessment difficult across campuses. (243)• The proposed charter’s Student Progression Plan (SPP) is unclear as to which course will include the required career component and an explanation of what the curriculum entail. This is key in reference to their mission. (254)• The SPP references High School coursework and credits even though the proposed school is only K-8.• More clarification is needed in the SPP for ESE students with excessive absences in relation to their disability. (243;260)• The Reading Levels identified on the Progression Charts are for <i>Independent Levels of Accuracy</i> which should be <i>Instructional Levels of Accuracy</i>. (257-258)• Applicant’s SPP provides for exemption ELLs less than one year on statewide assessments. (239)		
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<ul style="list-style-type: none"> ○ SCS practice is that all ELL students are assessed with statewide assessment(s) regardless of time in program. ○ SPP does not address credit allotment for students with transcripts from their country. • The college and career enrollment performance projections for MS acceleration are low considering that this is proposed to be a school focused on college and career. (41) 		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • Can CSUSA provide us with the Computer System and Internet Policy for review? • Will 100% of students be enrolled in AVID so this goal is measurable? • Which course(s) will include the mandated career component and what will that curriculum include? • Please describe the proprietary report card. Does this mean the school will not report all grades in the Student Information System? • What interim assessments will be given at the school? Are these the same at the school to be replicated? • Given the volume of assessments to be given, how will the school be able to schedule these, and the new FAST assessments given several times a year? 		

- **Exceptional Students**

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

Statutory Reference(s):

s. 1002.33(16)(a)3.

Evaluation Criteria:

A response that meets the standard will present:

- A clear description of the programs, strategies and supports the school will provide to students with disabilities that will ensure appropriate access for students with disabilities and that the school will not discriminate based on disability.
- A clear description of how the school will ensure students with disabilities will have an equal opportunity of being selected for enrolment.
- A comprehensive and compelling plan for appropriate identification of students with special needs to ensure they are served in the least restrictive environment possible, have appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities in the same manner as non-disabled students, receive required and appropriate support services as outlined in their Individual Education Plans and 504 plans, and participate in standardized testing.
- An understanding and commitment to collaborating with the sponsor to ensure that placement decisions for students with disabilities will be made based on each student's unique needs through the IEP process.
- An appropriate plan for evaluating the school's effectiveness in serving exceptional students, including gifted.
- A realistic enrollment projection (SWD) and a staffing plan that aligns with the projections.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• MTSS was well documented in Section 6. (49-50)• The application had a clear enrollment process.• The applicant proposes to offer contracted related service providers to meet the needs of students (i.e., SLP, OT,).		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• District supported school psychologists are not assigned to charter schools; CPAWP's will have to contract their own school psychologist. (Similar to other contract related service providers.) (50)		

<ul style="list-style-type: none">• The application indicated that staff would have ESE certification requirements K-12. The best practice is to have ESE and content area certifications. (52)• The last paragraph needs to be corrected to "CPAWP's gifted students will receive services in alignment with the services indicated on their Educational Plan (EP). Service models will include those described in FLDOE's Resource Guide for the Education of Gifted Students in Florida." (53)• According to the CCA Site Visit review, there were ESE compliance errors of concern including:<ul style="list-style-type: none">○ "There are several discrepancies in regards to the frequency of services and the goal page. According the A&P Manual: Frequency of Services – Indicate how often the services indicated will be provided. Measurable Goals and Short Term Objectives – Based on the student's present level of performance, identify at least one measurable goal with two short term objectives that identify what knowledge, skills, and/or abilities beyond the general curriculum the student will be expected to master."○ "The gifted teacher is welcome to attend district trainings for policy and procedure updates, information on best practices, and support with new systems. The gifted teacher does not currently have their endorsement and there is no evidence that they have completed coursework through an approved program. For re-appointment, they will need to successfully complete two gifted endorsement courses through an approved institution and submit the certificates prior to June 30, 2022."○ "Random IEPs were chosen and the Meeting Participation did not always match 331384: Purpose of meeting incorrect- 1 and 3 should have been checked since consent for re-evaluation occurred"○ "Language eligibilities held without any indication of MTSS"○ "Case managers are not assigned to all students with IEPs. 21 IEPs have ESE staffing specialist listed, 73 have admin support assigned. Without case managers correctly identified who is		
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<p>progress monitoring these IEPs, and how is progress shared with parents? Best practice would be to write a draft IEP prior to meetings that ESE staffing specialist can preview prior to meeting. There have been times when IEPs are being written at the table and meetings are not efficient and parents are having to wait as a result due to scheduling of back to back meetings.”</p> <ul style="list-style-type: none">○ “Therapy services (speech & language) not provided due to IEP meetings (all day Tuesday set for IEP meetings currently) and cancellation for admin. duties? and testing. Suggestion: Look at schedules (build in testing time and planning time) some students seen individually, consider grouping when possible based on IEP. Also, a single digital spreadsheet would help to include: student name, IEP and re-evaluation due dates, scheduled days and time for therapy, etc. rather than handwritten information on multiple pages (the spreadsheet would be easier to update information and any schedule changes). Random IEPs were chosen and progress monitoring of goals could not be found in ESE Star or Synergy on randomly selected students for academics”		
Questions	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• Based on limited ESE district staff, and critical shortages in Florida and nationally, how would CPAWP be able to contract ESE Representatives and School Psychologist to address needs? If unable to hire for these services, how will they be provided?• Are all ESE teachers expected to be dual-certified in both ESE K-12 and core subject areas?• Application references SCS procedures. Which specific procedures? Is the applicant referring to resources referenced regarding the evaluation process?		

- **English Language Learners**

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

Statutory Reference(s):

s. 1002.33(10)(f)

Evaluation Criteria:

A response that meets the standard will present:

- Demonstrated understanding of legal obligations regarding the education of English Language Learners.
- A comprehensive and compelling plan for educating English Language Learner students that reflect the full range of programs and services required to provide all students with a high-quality education.
- A clear plan for monitoring and evaluating the progress of ELL students, including exiting students from ELL services.
- Demonstrated capacity to meet the school's obligations under state and federal law regarding the education of English Language Learners.
 - A realistic enrollment projection (ELL) and a staffing plan that aligns with the projections.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">The applicant indicated that the proposed school, CPAWP, is willing to comply with Sarasota County School's ELL Plan.CPAWP shows willingness to implement an ESOL Program that meets compliance and services to ELL students and Families.		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">Screening<ul style="list-style-type: none">Applicant purports to use a language screener other than one used in SCS. However, the applicant also wrote that they will follow the SCS District ELL Plan: "CPAWP will follow all Sarasota County Schools, state, and federal guidelines related to		

<p>the identification, provision of service, assessment, monitoring, and exit of ELLs. We will adhere to the Sarasota County Schools’ ELL Plan...” (p57). The approved 2022-2025 SCS ELL Plan (DELLP) establishes that the district will use the Online WIDA Screener, and IPT in grade K (DELLP p 6-8)</p> <ul style="list-style-type: none">○ The applicant states that that if a potential ELL student does not qualify for placement based on a language screening, CPAWP may place the student in program based on an ELL committee meeting. Best practice as outlined in state statute is more complex:<ul style="list-style-type: none">▪ F.A.C. 6A-6.0902, requires the following for ELL students who may not qualify based on language screening: “1. Any student in grades K through 12 who scores within the limited English proficient range as determined by the publisher’s standards on a Department of Education approved aural and oral language proficiency test or scores below the English proficient level on a Department of Education approved assessment in listening and speaking [reading and writing], shall be classified as an English Language Learner and shall be provided appropriate services (§ (2) (a) 1)○ Upon request of a parent or teacher, a student who is determined not to be an English Language Learner or any student determined to be an English Language Learner based solely on one reading or writing assessment may be referred to an ELL Committee. The parents’ preference as to whether a student is determined to be an ELL or not to be an ELL shall be considered in the final decision. The ELL Committee may determine a student to be an English Language Learner or not to be an English Language Learner according to consideration of at least two (2) of the following criteria in addition to the test results from subparagraphs (2)(a)1. or 2. of this rule:<ul style="list-style-type: none">▪ a. Extent and nature of prior educational or academic experience, social experience, and a student interview,▪ b. Written recommendation and observation by current		
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<p>and previous instructional and supportive services staff,</p> <ul style="list-style-type: none">▪ c. Level of mastery of basic competencies or skills in English and heritage language according to local, state, or national criterion-referenced standards,▪ d. Grades from the current or previous years, or▪ e. Test results other than subparagraph (2)(a)1. or 2. of this rule”. <p>○ (b) Any determinations by the ELL Committee shall be contained in a written evaluation with a narrative description of the basis for the decision, which shall be placed in the ELL Student Plan. Such evaluations shall further set forth a plan, which will be implemented, to address the student’s English language needs. The basis and nature of the ELL Committee’s recommendations shall be documented and maintained in the student’s file."</p> <p>• Student Placement</p> <p>○ F.A.C. 6A-6.0902 provides specific criteria for placing student in ESOL program through an ELL committee in addition to results of the language proficiency assessment. F.A.C. 6A-6.0902, requires that the following for ELL students who qualify for ESOL services based on language screening be implemented: “The questions may appear on a school’s registration form or a separate survey form. The home language and the national origin of each student shall also be collected and retained in the district’s data system. Affirmative responses to question subsection (b) or (c), or both requires that the student be placed in the English for Speakers of Other Languages (ESOL) program until completion of the eligibility assessment. A student for whom the only affirmative response to the survey is question (a) does not need to be placed in the ESOL program pending assessment.</p> <p>○ ELL students with a “Yes” on the Home Language Survey (HLS) were not screened within the established timeline. (Clay County site visit report)</p>		
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<ul style="list-style-type: none">• Assessment to determine eligibility for appropriate services and funding.<ul style="list-style-type: none">○ (a) Each student who responded “yes” to any question on the home language survey shall be assessed to determine if the student is limited English proficient based on one of the standards set forth in this subsection. Any student identified by the home language survey who also meets one of the standards in subparagraphs (2)(a)1., 2. and 3. of this rule, shall be classified as an English Language Learner (ELL) and shall receive appropriate instruction and funding as specified in Sections 1003.56 and 1011.62, F.S.○ Any student in grades K through 12 who scores within the limited English proficient range as determined by the publisher’s standards on a Department of Education approved aural and oral language proficiency test or scores below the English proficient level on a Department of Education approved assessment in listening and speaking, shall be classified as an English Language Learner and shall be provided appropriate services. Assessment of each student’s aural and oral proficiency or listening and speaking should be completed as soon as possible after the student’s initial enrollment but not later than twenty (20) school days after the student’s enrollment.” The District ELL Plan requires student to be assessed within 10 days of enrollment and entered in SIS.○ Concerns regarding ELL assessment and initial placement were noted in the CCA site visit:<ul style="list-style-type: none">▪ “In reviewing folders and speaking with staff, there are students who were not tested within the state required timeline. Some have not been tested at all. ELL Coordinator is aware of this and working diligently to complete required tasks.”• Student ELL Plan<ul style="list-style-type: none">○ Applicant needs to clarify the procedure for student placement if they are coming from an out-of-state/country school district.		
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<ul style="list-style-type: none">○ F.A.C. 6A-6.0902 §(3)(b), requires that the following for ELL students who qualify for ESOL services be given equal credit for courses taken in their country of origin: “The school district shall award equal credit for courses taken in another country or a language other than English as they would the same courses taken in the United States or taken in English. For foreign-born students, the same district adopted policies regarding age-appropriate placement shall be followed as are followed for students born in the United States.”● Student Records<ul style="list-style-type: none">○ The ELL records were not up to date at the school the applicant is replicating. (Clay County site visit report)○ Entering ELL data in SIS was problematic at the school the applicant is replicating. (Clay County site visit report)○ Student information was not entered and updated by Date Certain in the school the applicant is replicating (Clay County site visit report)○ F.A.C. 6A-6.0902 §(1)(a), requires that the following for ELL students who qualify for ESOL services be reported for state funding○ “(a) English Language Learners shall have equal access to appropriate programs which shall include state funded English for Speakers of Other Languages (ESOL) instruction and instruction in basic subject areas which are understandable to English Language Learners and equal and comparable in amount, scope, sequence, and quality to that provided to English proficient students. Instructional services shall be documented in the form of an English Language Learner Student Plan”.○ F.A.C. 6A-6.0902 §(2) 3(d) states “An eligible student shall be reported for ESOL funding as specified in Section 1011.62, F.S.” Section 1011.62, F.S. §1(g) “A school district or a full-time virtual instruction program is eligible to report full-time equivalent student membership in the ESOL program in the		
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<p>Florida Education Finance Program provided the following conditions are met:</p> <ul style="list-style-type: none">▪ 1. The school district or the full-time virtual instruction program has a plan approved by the Department of Education.▪ 2. The eligible student is identified and assessed as limited English proficient based on assessment criteria.▪ 3.a. An eligible student may be reported for funding in the ESOL program for a base period of 3 years. However, a student whose English competency does not meet the criteria for proficiency after 3 years in the ESOL program may be reported for a fourth, fifth, and sixth year of funding, provided his or her limited English proficiency is assessed and properly documented prior to his or her enrollment in each additional year beyond the 3-year base period. b. If a student exits the program and is later reclassified as limited English proficient, the student may be reported in the ESOL program for funding for an additional year or extended annually for a period not to exceed a total of 6 years pursuant to this paragraph, based on an annual evaluation of the student’s status.▪ 4. An eligible student may be reported for funding in the ESOL program for membership in ESOL instruction in English and ESOL instruction or home language instruction in the basic subject areas of mathematics, science, social studies, and computer literacy”. <ul style="list-style-type: none">• Retention<ul style="list-style-type: none">○ Retention meetings for ESOL students were not evidenced in the school the applicant is replicating. (Clay County site visit report)○ F.A.C. 6A-1.09432 §(6)), requires that the following procedure for ELL students who qualify for ESOL services be followed for retention:		
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<p>“No promotion or retention decision may be made for any individual student classified as LEP based solely on a score on any single assessment instrument, whether such assessment instrument is part of the statewide assessment program or of a particular district’s formal assessment process. A formal retention recommendation regarding a LEP student may be made through action of a LEP committee.”</p> <p>Accommodations for State-wide Assessments</p> <ul style="list-style-type: none">○ Florida Administrative Code does not allow for oral presentation of prompts as stated in application (56).○ F.A.C. 6A-6.09091, § (2)(c) requires that the following procedure for ELL students who qualify for ESOL services be followed for student accommodations: (c) Assistance in the Heritage Language. ELLs may be provided limited assistance by an ESOL or heritage language teacher using the student’s heritage language for directions, prompts, items, and answer choices. This should not be interpreted as permission to provide oral presentation of prompts, items, and answer choices in English or in the student’s heritage language.● Instructional Model - Mainstream/Inclusion<ul style="list-style-type: none">○ The instructional model does not reference state adopted WIDA Standards to design and align instruction for language proficiency level(s). (56-57)● Extension of Services and Exiting ESOL<ul style="list-style-type: none">○ This must be based on state rule criteria for exiting and for extending ELL students from the ESOL Program, The applicant does not outline criteria for exiting or extending an ELL in the ESOL program. (58)○ 6A-1.09021 § (4) requires that the following procedure for ELL students who qualify for extension or exiting from ESOL using ACCESS for ELLs: “For students taking any administration of the Kindergarten ACCESS for ELLs or the ACCESS for ELLs 2.0 assessment, the English language proficiency level shall be a		
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<p>4.0 composite score or greater and at least 4.0 in the domain of reading. For students with significant cognitive disabilities taking any administration of the Alternate ACCESS for ELLs assessment, the proficiency level shall be a P1 composite score or greater”.</p> <ul style="list-style-type: none">○ No ELL Committing Meeting evidence that meetings took place at the school to be replicated. Signed documents of committee meeting members not evidenced. (Clay County site visit report)○ F.A.C 6A-6.0902 requires that the following procedure for ELL students who qualify for ESOL services be followed for all decisions requiring a committee decision: “Upon request of a parent or teacher, a student who is determined not to be an English Language Learner or any student determined to be an English Language Learner based solely on one reading or writing assessment may be referred to an ELL Committee. The parents’ preference as to whether a student is determined to be an ELL or not to be an ELL shall be considered in the final decision. The ELL Committee may determine a student to be an English Language Learner or not to be an English Language Learner according to consideration of at least two (2) of the following criteria in addition to the test results from subparagraphs (2)(a)1. or 2. of this rule:<ul style="list-style-type: none">▪ a. Extent and nature of prior educational or academic experience, social experience, and a student interview,▪ b. Written recommendation and observation by current and previous instructional and supportive services staff,▪ c. Level of mastery of basic competencies or skills in English and heritage language according to local, state or national criterion-referenced standards,▪ d. Grades from the current or previous years, or▪ e. Test results other than subparagraph (2)(a)1. or 2. of this rule.○ (b) Any determinations by the ELL Committee shall be contained in a written evaluation with a narrative description of the basis for the decision, which shall be placed in the ELL		
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<p>Student Plan. Such evaluations shall further set forth a plan, which will be implemented, to address the student’s English language needs. The basis and nature of the ELL Committee’s recommendations shall be documented and maintained in the student’s file.</p> <ul style="list-style-type: none">○ (c) An ELL Committee, after notification to the parent of the opportunity to participate in the meeting, shall conduct assessments referred to in subsections (2) and (3) of this rule and recommend an ELL Student Plan for such student.○ (c) Any teacher, administrator, parent, or parent’s designee may request the convening of an ELL Committee to review the student’s progress in attaining necessary subject area competencies or in overcoming persistent deficiencies in overall student performance. The ELL Committee may be reconvened at any time after a student has been served for a semester. The ELL Committee shall make recommendations for appropriate modifications in the student’s programming to address problems identified and shall document such modifications in the student’s ELL Student Plan”. <ul style="list-style-type: none">● Post-Program Review and Re-entry of ELL<ul style="list-style-type: none">○ Students do not follow procedures based on District ELL Plan and state rule F.A.C. 6A-6.0903. The ESOL Post Monitoring Form is used to document the process of exited ELL; no ELL committee is needed unless there are academic or linguistic concerns from any of the teachers. (58)○ F.A.C 6A-6.0903 and 2022-2025 District ELL Plan requires that the following procedure for post-monitoring ELL students “Monitoring takes place as follows from the date a student exits the program:<ul style="list-style-type: none">▪ 1. First Report Card- First full grading period after exit▪ 2. First Semi-Annual Review End of second full grading quarter after exit		
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<ul style="list-style-type: none"><ul style="list-style-type: none">▪ 3. Second Semi-Annual Review End of the third full grading quarter after exit▪ 4. End of Second Year Two years from the exit date• Post-Progress Monitoring of exited students (LF) -<ul style="list-style-type: none">○ There was no evidence that monitoring is occurring at the school the applicant is replicating. (Clay County site visit report)○ F.A.C 6A-6.0903 and 2022-2025 District ELL Plan requires that the following procedure for post-monitoring ELL students “Monitoring takes place as follows from the date a student exits the program:<ul style="list-style-type: none">▪ 1. First Report Card- First full grading period after exit▪ 2. First Semi-Annual Review End of second full grading quarter after exit▪ 3. Second Semi-Annual Review End of the third full grading quarter after exit▪ 4. End of Second Year Two years from the exit date• Staffing Plan<ul style="list-style-type: none">○ The applicant states that ESOL requirements are to be met once the teacher has an ELL assigned to their classroom. SCS timeline for ESOL state requirement at date of hire. (59)○ F.A.C. 6A-6.0907, The 2022-2025 District ELL Plan & Human Resources policy require that the following procedure are to be in compliance with State ESOL requirements ELL students The Approved 2022-2025 SCS ELL Plan and District Human Resources policy states that the teacher timeline(s) for teachers to meet ESOL state requirements begins on date of hire, not when they have an ELL ESOL student in the classroom. (59)		
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Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• How will CPAWP ensure that language-screening for new ELLs occurs within 10 days?• How will CPAWP ensure SIS data is entered in a timely manner?• Under what circumstances would a student be placed in ESOL Program when they did not qualify based on language screening? What criteria is used for placement?• How will CPAWP ensure that ELL Committee Meeting procedures are being followed in a timely manner and are evidenced?• How will CPAWP ensure that student documentation is filed and updated in the digital/paper platform within the given timeframe(s) for filing? Who will oversee compliance procedures as written in state law and in the SCS ELL Plan are being met at the site?		

- **School Culture and Discipline**

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• The applicant cites Marzano research and outlines a comprehensive plan for creating a positive school culture through researched-based methods including a school-wide behavior plan, PBIS, SEL, and a mental health plan. (60)• The applicant plans to utilize the SCS Code of Student Conduct. (64)		
Concerns	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• CPAWP’s application indicates that they would implement PBIS after the first year. PBIS should be implemented from the very first day. School-Wide Expectations need to be established day one. (62)• The specific PBIS expectations are not delineated. (60)• CPAWP’s application did not provide specifics or references on how		

they would meet all statutory mandates SR 6A-1.0018 referring to Behavioral Threat Assessment Requirements, CSTAG model. (62)		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • Why isn't the applicant planning to implement PBIS immediately? • What are the PBIS expectations? • Who will provide the training on the importance of routines and setting expectations with students in a consistent standardized manner? • Will the staff be receiving Crisis Prevention Intervention training and who will provide this training? • What is the SEL/Character Ed curriculum? • Will CPAWP be contracting with outside agencies for mental health services? • How will the applicant be recording SRA/BTA data? Will the school utilize EdPlan or a different program? • What are the roles of the school administrators, teachers, staff and the governing board regarding discipline policy implementation? • Application states that CPAWP will utilize the SCS code of conduct except for the Appeals Process. What is the proposed Appeals Process for discipline? (64) 		

- **Supplemental Programming**

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

Statutory Reference(s):

NA

Evaluation Criteria:

A response that meets the standard will present:

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

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">CPAWP has plans to offer a variety of extracurricular activities including partnerships, clubs, and athletics to provide a diverse experience for their student population. (66)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">The applicant indicated that CPAWP will use teacher stipends to help support clubs. How are stipends a funding source? What is the funding source? (66)		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">Will there be any clubs or activities that specifically align to the College and Career Readiness mission? (66)Are there any clubs offered at the site that are unique to your proposed school (to assist with recruiting?Are these offerings your own, independent, and not reliant on offerings at other non-charter public schools?		

II. Organizational Plan

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

10. Governance

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

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

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

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X	<input type="checkbox"/>	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• All legal requirements are met.		

Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The Florida Charter Education Foundation Inc. (FCEF) will hold the Charter for CPAWP. FCEF is a Florida-based non-for-profit corporation with current IRS 501(c)(3) status and organized exclusively for the purpose of governing charter schools. FCEF operates 11 charter schools in Florida. Five FCEF members will serve as the governing board for the proposed school. They are called the Board of Directors. The Board Chair serves as Vice Chair for 6 other FCEF schools. (Cover Sheet, 75, 70, 71, Attachment L)• All SCS existing charter school's governing boards have at least one member of the board residing in the local community. SCS views this as imperative. None of the proposed governing board resides near the proposed school site nor do they reside in Sarasota County. All governing board members are members of FCEF, located in Fort Lauderdale. Charter Schools USA, a for-profit entity, will manage the daily operations of the school. The Governing Board of Directors will hold the charter. This is not the case with the majority of charter schools currently in Sarasota County.• A Board of Directors that services eleven schools, raises doubt about effective and sustainable school governance.		

Proposed Charter Board of Directors				
Proposed Governing Board Member and Current Role at FCEF	County of Home Address	Current Occupation		
Valora Cole Board Chair/President	Hillsborough	President/ CEO of Agape International		
Ramdas Chandra/ Vice Chair	Broward	Associate Professor Nova Southeastern University		
Randolph Walker Treasurer	Broward	VP Hub-Branch Manager and Small Business Bank United		
Steve Knoble Secretary	Pasco	ED Early Learning Coalition of Pasco & Hernando County		
Eric Johnson Director	Hillsborough	Director of Community and Government Relations Hillsborough Community College		
(Attachment L)				

<ul style="list-style-type: none">• FCEF’s primary role is to:<ul style="list-style-type: none">○ Determine and preserve the organization’s mission and vision○ Create and oversee the organization’s operational policies○ Exercise continuing oversight over charter school operations○ Ensure effective organizational planning○ Ensure adequate resources, finances, and fiscal propriety○ Manage resources effectively (adopt and monitor budget and financials)○ Determine, monitor, and strengthen programs and services<ul style="list-style-type: none">▪ Assure programs and services are consistent with the mission▪ Assess the quality of programs and services○ Ensure charter compliance○ Enhance public standing○ Ensure legal and ethical integrity and maintain academic and financial accountability○ Understand laws applicable to charter school board members○ Recruit and orient new board members and assess board performance○ Monitor school academic performance and ensure adequate progress is made○ Select ESP○ Perform operational oversight of the ESP○ Attending training and conferences regularly (68)• FCEF actively searches for qualified candidates for consideration for board service. Members of FCEF leverage relationships from their professional careers and charter school involvement when searching for new board members. (74)		
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<ul style="list-style-type: none"> ○ The CRC would request local members on the board, including the principal who also serves as the Parent Involvement Representatives (PIR), and that at least two meetings be held, live, with the full board, in county, at the school, in the evening. (69) • The PIR should be listed and should connect directly to the Board of Directors. The principal should not be the intermediary (69) 		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • How long will the current Board of Directors serve? On page 72, the application states that the officers will be in the office for one year? How will the Board of Directors provide continuity in governance? • Must all board members also be members of FCEF? What if a community member wanted to serve on the board but NOT be a member of FCEF? • How are the management company's goals evaluated on an annual basis? If CSUSA is not meeting goals, how does the governing board address this? (67) • What involvement beyond the budget does the board exercise with the school? For example, does the board verify class size? ELL compliance? (67) • How does the board verify teachers of record and out of field teachers? • Does the board approve employee hiring and dismissals at monthly meetings? • Will the full Board of Directors attend board meetings at the proposed school at least twice a year? 		

11. Management and Staffing

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meet the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• An organizational plan was provided. A nice table of the roles of Charter School USA and the Governing Board was provided. (Attachment M, 132)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• Management:<ul style="list-style-type: none">○ The FCEF will contract with Charter Schools USA, a for-profit entity, and will manage the daily operations of the school. Charter Schools USA is an Educational Service Provider (ESP). Charter Schools USA manages 60 schools located within 14 school		

<p>districts in Florida. They also manage schools in four other states. (CSUSA website). Charter School USA will provide the following services:</p> <ul style="list-style-type: none">▪ 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 - All employees hired for the CPAWP will be employees of Charter School USA.▪ 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 <p>(360, 132, 525)</p> <ul style="list-style-type: none">• The budget indicates that FCEF will pay CSUSA 10% to 12% of revenue each year for management services. This will leave the school with very little fund balance. (Attachment X)		
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<ul style="list-style-type: none">○ The majority of SCS charters are operated independently with on-site staff managing the schools without a management company. This approach permits the schools to meet local needs working within the local community in which they serve. A large management company may be more apt to use a broad stroke approach where one size programming fits all. This is evident when reviewing the websites of CSUSA websites. This is concerning.● Financial Agreements<ul style="list-style-type: none">○ FCEF may decide to enter into other contractual agreements with related entities of CSUSA. If they do, they indicated that they will be dealt with in an ‘arm's length’ manner. (131)● Staffing:<ul style="list-style-type: none">○ There is not a description or monetary value of benefits offered. (438)○ Given the staffing shortage in the area, a 60-day benefit waiting period would not be competitive. (438)○ All staff will be employed by CSUSA and teachers are not part of the Florida Retirement System. (77, 132)○ The staffing plan is neither viable nor adequate.<ul style="list-style-type: none">▪ The proposed staff at CPAWP includes a principal, assistant principal student services coordinator, a salaried administrative staff person, a health aide, IT		
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<p>(Instructional Technology) support, other support, and before/aftercare staff. Instructional staff include teachers, ESE/ESOL coordinator and teachers, a co-teacher/interventionist and curriculum resource teachers. (80, 361) Significant positions are not mentioned.</p> <ul style="list-style-type: none">▪ The school will have to provide many contracted services which may not be available or affordable given the revenue available.○ The application indicates that there will be Teacher Certification Monitoring. The Clay County charter that is to be replicated in Sarasota, had over 40% of their teachers out of field according to Clay County School District's latest charter review. This Clay County school also did not post their out of field teachers on their website and they did not notify their parents. This is not legal under F.S. 1012.42 nor acceptable at any SCS charter or non-charter public school. (Clay County Site Visit Report)○ The CRC is concerned that the school will not meet mandatory class size compliance as indicated in the Education Plan above. This is further supported by Hillsborough County Schools where their CSUSA managed schools are often out of compliance with class size. This is not legal under Florida Statute nor acceptable at any SCS charter or non-charter public school. (Hillsborough Class Size Report)		
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Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • Is the model described for monitoring teacher certification the same model as that of the Clay County Academy? What specific procedures will the applicant institutionalize to ensure students are taught by certified teachers? How will the model be enhanced to prevent a large amount of non-certified teachers? (82) • How will the applicant monitor that all intensive reading teachers are endorsed in reading? • Please provide CSUSA standard operating procedures for ensuring class size mandates are met. What does CSUSA do when they are not met? • Are the co-teachers mentioned in the application certified? Please provide more information on the co-teacher model. • Will the school employ a certified school counselor instead of a student services coordinator? (373) • Does the staffing plan include a position dedicated to college and career programming and guidance to support its mission and vision? • How does the school meet their mental health needs; do they contract with LMHCs? How will the allocated mental health dollars be spent? Which staff member will serve as the mental health counselor? (63) • Is the enrollment manager a registrar? • Given the large amount of state testing, will a testing coordinator be employed? • Provide a copy of your non-compete contract and any other contracts that your employees sign upon being hired. • Provide information about the salary structure and benefit package. 		

<ul style="list-style-type: none">• CRC would like to ensure that the charter school learns and uses the district Student Information System (SIS) for all student and staff data to ensure funding and easy transfer between schools. Please confirm. Who will be trained to provide this service?• The applicant indicated that parents would have access to the Student Information System. (47) Please explain what is meant by this.		
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12. Human Resources and Employment

The Human Resources and Employment section should define the policies and procedures that frame the school’s relationship with its staff.

Statutory Reference(s):

s. 1002.33(7)(a)14.; s. 1002.33(12)

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The application provided an outline of leader and teacher evaluation plans. (84-85)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The proposed teacher salary at the proposed charter is below district levels; The school will quite possibly have difficulty recruiting and retaining highly effective staff. (86)• There is not a full description of the benefits offered. (438)• It does not appear that teachers will be part of the Florida Retirement System (FRS) (438).		

<ul style="list-style-type: none">• Given the staffing shortage in the area, a 60-day benefit waiting period would not be competitive. (438)• The Clay County School District site visit in February at the Clay Charter Academy school to be replicated revealed that nearly 40% of teachers were not certified in the classes they were teaching. (Clay County Site Visit Report)• The Clay County School District site visit in February at the Clay Charter Academy school to be replicated indicated that the Out of Field information was not listed on the school’s website. Teachers were not labeled as out of field and parents were not notified. This is in violation of state statute 1012.42 (Clay County Site Visit Report)• CSUSA will utilize the Northwest Evaluation Association (NWEA) MAP assessment to determine student growth and utilize this metric to be 45% of both teachers and administrators’ evaluation. SCS and most Sarasota charters utilize SCS evaluation models where the student growth component contributes 30% to the total evaluation. Although CSUSA can determine their own metrics, these would be out of alignment with all SCS non-charter and most other charter Sarasota Schools. (85)		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• What is the consequence for an employee who participates in the New Educator Prep Program and the Florida Teachers of Tomorrow who resigns from CSUSA before they have met their two-year commitment? (83)		

<ul style="list-style-type: none">• What percentage of teachers is an acceptable percent to be out of field? How will the governing board and CSUSA ensure that most teachers are in-field? (82)• Provide evidence of the procedure in use to notify parents if a teacher is out of field? (82)• How are temporary and renewal requirements monitored for certified teachers? (82)• How are teachers monitored and how is the information communicated to the district? (82)• Given a K-8 school will be built and operational within 1.5 miles of the proposed charter employing teachers at a higher salary, with full benefits and the opportunity to be members of a strong union and the FRS, how will the charter propose to attract a sufficient, certified workforce?		
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13. Professional Development

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

Statutory Reference(s):

NA

Evaluation Criteria:

A response that meets the standard will present:

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

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• CSUSA outlined a strong professional development program (PD) and robust evaluation and lesson plan format. (90-92)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• Although demonstrating awareness of new standards and new assessments in other parts of the application the CSUSA Professional Development Plan did not reference specific plans to train staff in the BEST standards or the new Florida Assessment Programs which are timely and necessary. (90,92,139)		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• SCS offers extensive Professional Learning in current issues necessitated by legislature, standard changes, and assessment changes in addition to best instructional practices. How and when will you provide this professional development? How will you follow up on the staff's implementation of practices learned?		

<ul style="list-style-type: none">• Other than the PD Days when students are absent, how will teachers be compensated for training?• What exactly will the applicant’s professional development program offer as it relates to the vision and mission?		
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14. Student Recruitment and Enrollment

The Student Recruitment and Enrollment section should describe how the school will attract and enroll its student body.

Statutory Reference(s):

s. 1002.33(7)(a)7.; s. 1002.33.(7)(a)8.; s. 1002.33(10)

Evaluation Criteria:

A response that meets the standard will present:

- A student recruitment plan that will enable the school to attract its targeted population.
- An enrollment and admissions process that is open, fair, and in accordance with applicable law.
- A plan and process that will likely result in the school meeting its enrollment projections.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The applicant will use multiple methods to contact families and recruit students. (94-98)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The ESP gathers student and community research to solidify the identity of school. As a replication school, the research should already be established. (94)• SCS will open a K-8 school approximately 1.5 miles away from the proposed charter at a similar time. Both SCS elementary and SCS middle schools are state-of the art with certified staff in advanced programs. SCS middle schools have multiple opportunities to earn accelerated coursework. This was not the case with the school to be replicated. CPAWP may not be able		

<p>to compete when recruiting students and therefore not meet its enrollment projections.</p> <ul style="list-style-type: none"> • The applicant reports that they will market several factors with their school to include college and career readiness and academic programming, and extracurricular activities. The application does not provide information on unique and special programming in any of these areas to be used for recruitment. (95) 		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • Why wouldn't the school identity of CPAWP already be developed prior to the submission of this application? (94) • Why was this location selected as a replication of a school in Clay County when the demographics are so different? • How will you compete for students with a new K-8 district school in the same area? What will attract students to enroll in the charter school? What will be unique? • What specific partnerships will you utilize to provide extracurricular and athletic activities at your site without utilizing traditional SCS? • What school-specific activities and programming will you market to attract students? (66) 		

15. Parent and Community Involvement

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

Statutory Reference(s):

NA

Evaluation Criteria:

A response that meets the standard will present:

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

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• CPAWP appears to emphasize active parent involvement. They require parent volunteer contracts and form parent teacher committees. (99)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• On page 99, the application indicates that a parent committee <i>may</i> be established. This should be changed to <i>shall</i> or <i>will</i>. (99)• The application did not report any specific community, business, law enforcement, human services or not for profit partnerships. (100)		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• What happens if parents do not meet their hourly volunteer requirement?• Will the parent representative be the school principal or other staff member or a non-staff member parent?		

<ul style="list-style-type: none">• How and Who is responsible for developing community partnerships? Who will these partnerships be with, which community agencies?• Will parents volunteering on campus be vetted for safety and security?		
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+III. Business Plan

The Business Plan should provide an understanding of how the charter operators intend to manage the school’s finances. It should present a clear picture of the school’s financial viability including the soundness of revenue projections; expenditure requirements; and how well the school’s budget aligns with and supports effective implementation of the educational program.

16. Facilities

The Facilities section should provide an understanding of the school’s anticipated facilities needs and how the school plans to meet those needs.

Statutory Reference(s):

s. 1002.33(7)(a)13.; s. 1002.33(18)

Evaluation Criteria:

If a facility is acquired, reviewers will look for:

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

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

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• The estimated building construction budget appears to align with current market costs.		

Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • The applicant notes a potential site has been identified. In March 2022, a conceptual site plan for the school was submitted to the City of North Port (CNP) for a Pre-Application Review and there are concerns the infrastructure (i.e. roadways, water/sewer, utilities etc.) for this site may not be constructed in time for the proposed opening. (101) • The conceptual site plan provides a four-lane parent loop around the school site creating safety concerns regarding student drop-off/pick-up. (101) • The student bus ridership is 29% for elementary and 60% for middle schools identified by the Applicant within a 15-minute drive from the Charter School site, demonstrating a local need for school-provided transportation. (101-104): <ul style="list-style-type: none"> ○ In the CNP March 2022 Pre-Application Meeting, in response to questions on the lack of a bus loop, the applicant noted transportation was not going to be provided. ○ This application notes, <i>if necessary</i>, CPAWP may provide transportation through a <i>contract with a private or provider or parents</i> (04) ○ “One bus has been included in the budget for transportation in Year 1 at a rate of \$55,000.” and “<i>If necessary</i>, CPAWP will budget for additional buses to meet the needs of the student population.” ○ The conceptual site plan only shows potential space on the north side of the building for two buses. ○ There is conflicting information regarding facility needs for adequate bus queuing, not providing students transportation, and/or only budgeting for 1-2 buses which may not provide enough transportation to area students. • The current conceptual site plan does not meet the State Requirements for Educational Facilities (SREF). If the applicant plans to utilize any funding sources outside of state and federal funding, Attachment U needs to be submitted. (101-104) 		

<ul style="list-style-type: none"> • The projected \$13 million budget for due diligence, legal fees, land, architectural fees, design fees, engineering, site work and construction of the school facility may not be enough funding to provide all fees listed in the Application. • The proposed site plan indicates a 40, 235 square foot building. By FLDOE standards, there should be an allowance of 44 s.f. per student. $765 \times 44 = 33,660$ s.f. $40,235 - 33,660 = 6,575$ s.f. left over for offices, dining room (approximately 3,060 per FLDOE), restrooms, mechanical & electrical rooms, storage, custodial, etc. It is possible that the applicant has planned adequate space, but the margins are tight. (CNP Site Plan Application) 		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • Please confirm by providing documentation that the required infrastructure (i.e., roadway, water/sewer, utilities etc.) will be constructed and open for school traffic by August 2023. (CNP Site Plan Application) • Does the applicant have a back-up facility if construction and Certificate of Occupancy are not completed by the proposed open date? • The described facility indicates compartmentalized classrooms in partitioned learning. Will this be for co-teaching? • Can the applicant provide the Lease Agreement between CPAWP's governing board and the Owner of the Facility per CPAWP's, "...anticipation that the facility will be owned and constructed by a private developer, who will lease the facility to the governing board."? 		

17. Transportation

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

Statutory Reference(s):

s. 1002.33(20)

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	<input type="checkbox"/>	X

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The preliminary site plan that was submitted in the Project Application with Wellen Park does not appear to include bus loop. (CNP Site Plan Application)• Current SCS ridership at neighboring schools is high. It ranges between 20 percent and 60 percent. There is conflicting information about whether the applicant will or will not provide transportation. One bus, as mentioned in the application, will not be sufficient for current ridership needs in the local area. (104)• Application allots \$55,000 for a bus; this is not sufficient for the purchase and operation of a school bus. The Charter Revenue Worksheet estimates funding at \$22,250 but \$9,796 of this funding is for 7 ESE students who do not appear to be in attendance. (104;480)		

<ul style="list-style-type: none"> • Transportation is assumed at 10% which would be 60 students; on the Charter Revenue Worksheet participation is 38 students. (113:480) • The site plan visualized only a four car deep pick up loop surrounding the school. (CNP Site Plan Application) 		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • Is the applicant planning to purchase a bus or lease? How will the applicant pay for additional buses? • What is the “contracted pupil transportation” of \$55K and how does the applicant plan to fund the delta between that and the \$12,454 in the Charter worksheet? (480;487) • Is the applicant planning to contract with parents to provide transportation? Are parents and/or the applicant expecting reimbursement? • Given the site plan design of a four car deep pick up loop, how will 700 students be dropped off and picked up safely? • If CPAWP determines it <i>is necessary</i> to provide students transportation where will the bus loop be built and how will it be funded? • Will the applicant be providing transportation for students? If not, how will not providing transportation impact student enrollment? 		

18. Food Service

The Food Service section should describe how the school will address these services for its studentbody.

Statutory Reference(s):

s. 1002.33(20)(a)1.

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The application states CPAWP will comply with federal nutrition standards for school lunches and breakfasts. (105)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• The application does not clearly identify who would be the provider of food service. (105)• If the applicant is planning to contract with SCS Food and Nutrition Services (FNS) to provide food service, it would be difficult. Given the proposed location of this school FNS would have a challenging time meeting food service need. Surrounding schools do have the capacity to assist. (105)• The plan indicates a vendor would supply all food service equipment. SCS FNS does not have the financial ability to purchase equipment for this school, or to deliver school meals. This is also not standard SCS practice with other charter schools. (105)		

<ul style="list-style-type: none">• If the applicant contracts with an outside vendor (not SCS FNS) for food service, the applicant would need to submit plans for processing FRL applications, meeting wellness policy requirements, professional development, etc. (105)• The food service budget of \$275,109 is not enough to cover staff and equipment purchases. (105)		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• Who is the applicant planning to contract with for food service?• The application reads that the school would have a Revenue of \$368,899 but will have expenditures of \$275,109. How is this being calculated? What is the source of this revenue? What does it include? (486-487)		

19. School Safety and Security

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

Statutory Reference(s):

s. 1002.33(7)(a)11; s. 1002.33(16)(b)8, 12, and 14

Evaluation Criteria:

A response that meets the standard will present:

- A plan that ensures the safety of students and staff and the protection of the school facility and property. Note that a fully developed plan will be completed after approval of the application.
- A description of how the school plans to comply with the requirement that at least one safe-school officer is present while school is in session.
- Procedures that clearly demonstrate a plan to respond to active assailant incidents.
- A description of how the school plans to train school staff to respond to active assailant incidents.
- A description of how the school will establish a team to assess and intervene with individuals whose behavior may pose a threat to the safety of staff or students.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• CSUSA has provided a good framework for following best practices withing the current laws and FLDOE rules. (106-111)		
Concerns		
<ul style="list-style-type: none">• The application states that CSUSA relies on the TAPS Application. This application will have to be reevaluated as, to date, it does not meet Allyssa’s Law requirements, even with the addition of the AT&T/Mutualink contract. TAPS cannot be used within Mutualink to meet the law. (107)• The application mentions training to Threat Assessment Teams in Florida requires training to the CSTAG model. The application does not specify if their training meets state standards. (109)		

<ul style="list-style-type: none">• The proposed school’s budget indicates that it will pay its SSO \$52,000. SCS pays \$68,000 (with benefits). The city of NP charges \$73,430 for a contracted SSO. If the charter used a SCS SRO, this service would be \$88,000 as it would also include the use of a vehicle and other equipment. This discrepancy in salary will render recruiting difficult.		
Questions		
<ul style="list-style-type: none">• The applicant indicated that they plan to enter a contract with Sarasota County Sheriff's Office to provide their SSO officer. Is this officer to be the one teaching YMHFA (Youth Mental Health First Aid). The SC Sheriff's office will not comply with this presumption. Who then will fill this role for the school? (106)• The application states they <i>may</i> enter partner with Integrity, a security that assists with staffing SSOs and/or Dynamic Security Integrated to staff a Guardian. Does Integrity have the ability to fulfill SRO roles in Sarasota County? Does DSI have the ability to put a Guardian in the school? (106)• The TAP application cannot replace FortifyFL. How will the school use both? (111)		

20. Budget

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

Statutory Reference(s):

s. 1002.33(6)(a)5.; s. 1002.33(6)(b)2.

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	<input type="checkbox"/>	X

CRC Comments/Clarifications Needed		
Strengths	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• Charter Revenue Worksheet was utilized.		
Concerns	Applicants’ Response	Applicants’ Response
<ul style="list-style-type: none">• The \$4,874,972 from Charter Worksheet does not add up correctly. Please resubmit in excel version. (480)• The startup budget has the ESP paying for everything at start-up. Is this in a written contract?		
Questions	Applicants’ Response	Applicants’ Response
<ul style="list-style-type: none">• Attachment X (486-501):<ul style="list-style-type: none">○ What grants are used to reach \$308k in revenue? (486)○ What makes up the Capital Outlay revenue? How was \$604 per student calculated? (486)○ What is Miscellaneous Revenue? (486)○ What rate was used for workers compensation rate? (486)○ The legal fees look low, what is contingency plan if get sued by a student/parent? (486)		

<ul style="list-style-type: none">○ Fee to support center services - does that include repayment of startup costs and if so, what is the repayment schedule? (486)○ Fee for support Center Services is listed as a percent on Total Revenue or State Revenue? (486)○ Why are the professional fees drastically decreasing in years 2-5? (486)○ Contracted Pupil Transportation- Who is the contract with? (487)○ Who are you contracting with for food service and how is this fee being calculated? (487)○ The drug testing expense is underestimated. (487)○ The mental health contract fee is underestimated. (487)○ The travel, meals, lodging expenses are confusing. How were they determined? (487)○ What is the student uniform expense? Does the school pay for all student uniforms? (487)○ Principal Payments are \$88,305 higher than Proceeds. What makes up the difference? (488)○ What type of debt is being taken out and what is the pledge for the debt? (488)○ 100/75/50 % Redemption of Principal payments changed, how is this being calculated? (491)○ “Revenue – Other (see assumptions),” where is are assumptions located? (503)○ Assuming the school will not participate in FRS (Florida Retirement System), are you offering 401K? What will this look like? (489)○ The CRC did not see any Insurance for a Startup Budget. Is the parent company covering this? Renters/Liability etc? (487)○ On 75% revenue, Nurse position is deleted. Is this allowable? (490)○ The proposed Rent is low, and utilities are 1/2 of rent. Is this accurate? (503)○ The Professional services are \$3,000 for one month only. What is this for? (503)		
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21. **Financial Management and Oversight**

The Financial Management and Oversight section should describe how the school’s finances will be managed and who will be responsible for the protection of student and financial records.

Statutory Reference(s):

s. 1002.33(6)(a)5.; s. 1002.33(7)(a)9.; s. 1002.33(7)(a)11.

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X	<input type="checkbox"/>	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants’ Response	CRC Final Comments
<ul style="list-style-type: none">• CSUSA has provided a good framework for oversight of the school’s finances, financial management, and internal controls to ensure compliance with all financial reporting requirements• Financials will be audited by an independent certified public accounting firm.		
Concerns	Applicants’ Response	CRC Final Comments

<ul style="list-style-type: none"> The application indicates that the role of the School Operations Administrator (SOA) will include the receipt and disbursement of cash, deposit funds, issue check requests, review and approve invoices, and maintain reconciliation of internal funds. It is concerning that the same individual would receive cash and reconcile. This should be a separate individual to ensure accuracy. (115) 		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> Are procedures in place to prevent fraud at local level? 		

22. Start-Up Plan

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

Statutory Reference(s):

s. 1002.33(7)(a)16.

Evaluation Criteria:

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

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">CSUSA appears to have an organized start-up plan including a Project Manager, detailed checklist, and projected timetable. (119-120)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">While the Start-up Plan section is defined, there are several operational items throughout the application that are less defined and leave room for concern.		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">If there are any major delays in the project plan, when and by whom notifies the Sponsor. (119)		

Addendum

Addendum A: Replications

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

Statutory Reference(s):

s. 1002.33(6)

Evaluation Criteria:

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

- Evidence that school or model to be replicated demonstrates academic, organizational, and financial success.
- A clear, compelling vision for what is being replicated in terms of essential components of the educational program.
- A convincing rationale for how the school or model to be replicated will successfully serve the proposed target student population.
- A strong justification for changing key components of the original school or model in the proposed school. Such justification should include why the changes will better suit the targeted student population and whether the model is still similar enough to the existing model so that comparable successful outcomes are likely.
- Evidence that the applicant group has a sound plan for developing the capacity to replicate an existing school including adequate financial and human resources.
- If applicable, evidence of successful past replications or lessons learned from unsuccessful attempts at replication will increase the probability that this replication will be successful.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• NA		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• NA		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• NA		

Addendum A1: High-Performing Replications

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

Statutory Reference(s):

s. 1002.331

Evaluation Criteria:

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

- Evidence that the applicant’s school and the school to be replicated (if different) are designated by the Commissioner of Education as a High-Performing Charter School.
- Evidence that the proposed school will be substantially like the high-performing school that is being replicated. Reviewers should base this determination on the response to this question as well as applicant’s proposed educational, organizational, and business plans as described throughout the application.
- Evidence that the organization or individuals involved in the establishment and operation of the proposed school are significantly involved in the operation of the high-performing school that is being replicated.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	X	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• FLDOE verified that Clay County Academy meets the criteria for high-performing charter school status pursuant to F.S. 1002.331 in a letter dated 08/14/2019. (505)		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• 1002.331 High-performing charter schools. A charter school is a high-performing charter school if it:<ul style="list-style-type: none">○ (a)1. Received at least two school grades of “A” and no school grade below “B,” pursuant		

<p>to s. <u>1008.34</u>, during each of the previous 3 school years or received at least two consecutive school grades of “A” in the most recent 2 school years for the years that the school received a grade; or 2. Receives, during its first 3 years of operation, funding through the National Fund of the Charter School Growth Fund, and has received no school grade lower than a “C,” pursuant to s. <u>1008.34</u>, during each of the previous 3 school years for the years that the school received a grade.</p> <ul style="list-style-type: none">○ (b) Received an unqualified opinion on each annual financial audit required under s. <u>218.39</u> in the most recent 3 fiscal years for which such audits are available.○ (c) Did not receive a financial audit that revealed one or more of the financial emergency conditions set forth in s. <u>218.503(1)</u> in the most recent 3 fiscal years for which such audits are available. However, this requirement is deemed met for a charter school-in-the-workplace if there is a finding in an audit that the school has the monetary resources available to cover any reported deficiency or that the deficiency does not result in a deteriorating financial condition pursuant to s. <u>1002.345(1)(a)3</u>. <ul style="list-style-type: none">• A replicated school should be created to be substantially like the High Performing School. Additionally, any district would want the school to be replicated to have high achievement in their area of focus or mission. In this instance, the focus of CPAWP is college and career readiness.• The application overall does not clearly specify how		
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<p>the proposed charter’s population and operation is a clear replication of Clay County Academy. The populations will differ, the vision and mission differ, the career readiness accelerated performance scores of Clay County Academy are lower than most nearby Sarasota Schools from which the proposed charter would be recruiting students.</p> <p>Similarity and Differences between Clay County Academy and the proposed School - CPAWP:</p> <p>Similarities:</p> <ul style="list-style-type: none">• Both Clay County Academy and CPAWP are both managed by CSUSA with a Board of Directors from FCEF• Both schools would pay CSUSA to manage the day-to-day school operation. <p>Differences:</p> <ul style="list-style-type: none">• Mission and Vision<ul style="list-style-type: none">○ <i>Clay Charter Academy Mission:</i> To create a learning environment that integrates a research-based curriculum, a culture of student safety and success, and concentration on academic rigor while focusing on citizenship and experiential learning through student engagement. (121)○ <i>College Preparatory Academy at Wellen Park Mission & Vision:</i> The mission of College Preparatory Academy at Wellen Park is to engage students in rigorous academics and experiential learning that builds foundational college and career readiness. (121)• A key element absent from the Clay Charter Academy Mission is college and career readiness, the proposed		
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mission of CPAWP.				
<ul style="list-style-type: none">Demographics<ul style="list-style-type: none">Although similar in percent ELL and ESE, the schools differ on FRL and ethnicity representation				
School	FRL	White	Black	Hispanic
CPAWP *	35%-79%	60%-78%	0% - 9%	10%-24%
CCA**	36%	40%	27%	25%
<p>*Sarasota data based on Survey 3, ranges for schools identified by the applicant on page 5 of the application.</p> <p>**Clay Charter Data from FLDOE</p>				
<ul style="list-style-type: none">College and Career Readiness: The application emphasized how students would be receiving a foundation for college and career readiness. This should be evident in their programming at the school to be replicated and the proposed new school. If programming is proposed/replicated, it should be rigorous in comparison to other programming already available in other district schools. An indication of success in rigorous courses for college and career readiness is student performance on the accelerated coursework.<ul style="list-style-type: none">Clay Charter Academy:<ul style="list-style-type: none">A college and career targeted course identified on their website is the use of AVID as an elective– The course includes teaching students organizational and higher order thinking skills, study skills and tutorials. There is no evidence of CTE (Career Technical Education)				

<p>programming.</p> <ul style="list-style-type: none">○ College Preparatory Academy at Wellen Park:<ul style="list-style-type: none">▪ The CPAWP application indicated that the school may use AVID if students/staff are interested (31)▪ Sarasota students have opportunities to experience CTE programming with documented career outcomes (certifications).○ Clay Charter Academy<ul style="list-style-type: none">▪ The students' performance in accelerated coursework is low as reported by FLDOE. In SY 20-21, 27 students earned acceleration credit, and in SY 18-19, 20 students earned acceleration credit; and in SY 17-18, 14 students earned accelerated credit.○ College Preparatory Academy at Wellen Park:<ul style="list-style-type: none">▪ Sarasota students' enrollment and performance on accelerated coursework is much higher. Although difficult to determine what CPAWP's acceleration would be, an existing south county Sarasota's KG-8 site at Laurel Nokomis had 120 students earn acceleration credit in SY 20-21, 120 students earn it in SY18-19 and 103 students earn acceleration credit in SY 17-18. <p>Academic:</p> <ul style="list-style-type: none">• All public schools had the option to be graded in SY		
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2021, Many schools did not choose this option statewide. However, FLDOE did report school grade performance scores (without the letter grade) on all schools. If Clay Charter Academy had been graded in SY 2021, they would have been a C school; their overall percentage of points was at 48% out of 100. Prior school grades are 2016-C, 2017- B, 2018-A, 2019-A. If the C were considered, they would not meet the qualifications of a High-Performing Charter School. (FLDOE Website)		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">There are many differences and unknowns between the proposed charter and the school to be replicated. Why do you believe that a replication of Clay Charter Academy would be successful and offer enhanced rigor and college readiness in Sarasota when competing with high performing traditional schools?		

Addendum B: Education Service Providers

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

Statutory Reference(s):

s. 1002.33(6)(a)

Evaluation Criteria:

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

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X	<input type="checkbox"/>	<input type="checkbox"/>

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">• A Draft Management agreement is included in the application (515)		

<ul style="list-style-type: none"> • A list of other ESP schools was provided via link. (128) • A nice table of the roles of Charter School USA and the Governing Board was provided. (Attachment M, 132) 		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> • The oversight and management of CPAWP is proposed to have several layers. The FCEF applies for the charter and will hire CSUSA to manage the school. CSUSA staff, leaders and teachers fulfill all school daily functions. Some services are contracted. This organizational structure is in place at 11 other locations/schools. This existing relationship appears to be one reason FCEF chose CSUSA. (CSUSA and FCEF websites, application (72)) • The Florida Charter Education Foundation Inc. (FCEF) will hold the Charter for CPAWP. FCEF is a Florida-based non-for-profit corporation with current IRS 501(c)(3) status and organized exclusively for the purpose of governing charter schools. FCEF operates 11 charter schools in Florida. Five FCEF members will serve as the governing board for the proposed school. They are called the Board of Directors. The Board Chair serves as Vice Chair for 6 other FCEF schools. (Cover Sheet, 75, 70, 71, Attachment L) • The proposed Board of Directors are all members of FCEF. Their primary role is to: <ul style="list-style-type: none"> ○ Determine and preserve the organization's mission and vision ○ Create and oversee the organization's operational policies 		

<ul style="list-style-type: none">○ Exercise continuing oversight over charter school operations○ Ensure effective organizational planning○ Ensure adequate resources, finances, and fiscal propriety○ Manage resources effectively (adopt and monitor budget and financials)○ Determine, monitor, and strengthen programs and services○ Assure programs and services are consistent with the mission○ Assess the quality of programs and services○ Ensure charter compliance○ Enhance public standing○ Ensure legal and ethical integrity and maintain academic and financial accountability○ Understand laws applicable to charter school board members○ Recruit and orient new board members and assess board performance○ Monitor school academic performance and ensure adequate progress is made○ Select ESP○ Perform operational oversight of the ESP○ Attending training and conferences regularly (68) <ul style="list-style-type: none">● The FCEF will contract with Charter Schools USA, a for-profit entity, and will manage the daily operations of the school. Charter Schools USA is an Educational Service Provider (ESP). The budget indicates that FCEF will will pay CSUSA 10% to 12% of revenue each year for management		
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<p>services. This will leave the school with very little fund balance. (Attachment X)</p> <ul style="list-style-type: none">• Charter Schools USA manages 60 schools located within 14 school districts in Florida. They also manage schools in four other states. (CSUSA website). CSUSA will provide the following services:<ul style="list-style-type: none">○ 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 - All employees hired for the CPAWP will be employees of Charter School USA.○ 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(360, 132, 525)• The majority of SCS charters are operated independently with on-site staff managing the schools without a management company. This approach permits the schools to meet local needs working within the local community in which they serve. A large management company may be more		
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<p>apt to use a broad stroke approach where one size programming fits all. This is evident when reviewing the websites of CSUSA school websites. This is concerning.</p> <ul style="list-style-type: none">• Although the roles are defined in the application as separate, the multiple levels of management will overlap and may be redundant and therefore not cost effective.• In addition, the SCS central offices serving as the Local Educational Agency (LEA) or sponsor must also perform state mandated duties and obligations in many areas to include certification review, financial oversight, state reporting etc. for which we are compensated a a state determined rate (2%). Although mandated and necessary, it adds another layer of oversight and workload for all sponsor/LEA departments.• FS 1002.33 6(c) Sponsor accountability -<ol style="list-style-type: none">1. The department shall, in collaboration with charter school sponsors and charter school operators, develop a sponsor evaluation framework that must address, at a minimum:<ul style="list-style-type: none">○ a. The sponsor’s strategic vision for charter school authorization and the sponsor’s progress toward that vision.○ b. The alignment of the sponsor’s policies and practices to best practices for charter school authorization.○ c. The academic and financial performance of all operating charter schools overseen by the sponsor.○ d. The status of charter schools authorized by the sponsor, including approved, operating, and closed schools.		
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<ul style="list-style-type: none"> ○ 2. The department shall compile the results by sponsor and include the results in the report required under sub-sub-subparagraph (b)1.k.(III). ● Financial Agreements <ul style="list-style-type: none"> ○ FCEF may decide to enter into other contractual agreements with related entities of CSUSA. If they do, they indicated that they will be dealt with in an ‘arm's length’ manner. (131) ● Target populations and procedures <ul style="list-style-type: none"> ○ The demographic population of Clay Charter Academy and CAPWP are different as noted in Addendum A1. It is unknown whether the replicated charter’s programs will be successful in Sarasota County. 		
Questions	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none"> ● Does the proposed school Governing Board have a documented back up plan if they determine it wants to end the relationship with the ESP? (527) ● Given that CSUSA has partnered with FCEF on 11 charter schools, what other financial agreements outside of the management agreement have been in place? If this charter was granted, what other partnerships will exist between CSUSA and the school and FCEF? 		

Applicant History Worksheets (Form IEPC-M1A)

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

Statutory Reference(s):

s. 1002.33(6)(a)

Evaluation Criteria:

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

CRC Comments/Clarifications Needed		
Strengths	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">Applicant provided in Addendum DD.		
Concerns	Applicants' Response	CRC Final Comments
<ul style="list-style-type: none">Many schools managed by CSUSA were not high performing.The Applicant Worksheet History demonstrates that a number of the CS USA schools were Ds and Fs, especially in school years 2016-2017 and 2017-2018, prior to COVID.		
Questions	Applicants' Response	CRC Final Comments



Clay County District Schools Charter School Annual Site Visit Report

School	Clay Charter Academy
Year	2021-22
Date of Site Visit	February 18, 2022
Date Report Given to School	
Response Deadline	

Report Details

Each of the areas below is linked to a tab/page in this spreadsheet with details of findings and a location for response.

Area	Requires Response	When response for cure is completed, reshare the sheet with the following people who oversee that area. CC Karen McMillan.
Required Reporting	Yes	Kelli Mulford
Governing Board	Yes	Karen McMillan
Finance	Yes	Susan Legutko
Facilities & Operations	No	Bryce Ellis Michael Kemp
Records & Communicaton	Yes	Kelli Mulford
ESE	Yes	Teresa Carlson *Gifted: Jessica Ehlinger *504: Erika Gilbert
ELL Services	Yes	Ryan Widdowson
Curriculum and Instruction	Yes	Bianca Montoro *MTSS: Robin Rae
Assessment	No	Steve Amburgey
HR	Yes	Jeff Schriver Samantha Wright

REQUIRED REPORTING (Link to Submission Folder)						
Criteria	Y	P	N	N A	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Kelli Mulford cc Karen McMillan
Student information in the District's SIS is maintained such that new data, missing data, and data requiring updates are handled in a prompt and timely manner.	Y					
Staff responsible for data management attends the District training to ensure accuracy of data. As recommended.	Y					
Students' grades are recorded in the District's SIS for students in a timely manner following the end of each grading period.	Y			*		
Staffing information is appropriately reported/updated on the /updated on the provided spreadsheet.		P			Met with School Operations Administrator to discuss cure.	
Attendance (excused/unexcused absences and tardies) is reported/recorded in the District's SIS, as required.	Y					
Discipline is reported/recorded in Synergy.	Y					
The school's website is kept in compliance with the following information available to all stakeholders: School's academic performance and school grade (?) The names of the governing board members and representative The programs at the school Curric Extra Curr. Any management company, service providers or education management corporations associated The school's budget and annual independent fiscal audit Minutes of governing board meetings	Y					
All immunizations records are current and entered into the District's SIS by October 1st.	Y				District has monitored immunization status and communicated with schools. CCA was completely compliant during visit on 2.22.22	

GOVERNING BOARD (Link to Submission Folder)

Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Karen McMillan
Governing Board meeting schedule is up-to-date and posted on the school website.	Y				
Board Meeting agenda and minutes are posted in a timely manner on the school website.	Y				
Newly appointed governing board members have been reported to the CCDS School Choice Office and updated on the school's website; fingerprinting and training completed.	Y				
Board Representative's name and contact information is posted on the website and easily accessible.	Y				
At least two public meetings are scheduled to be held in the district during the school year.			N	None are scheduled in Clay County	

FINANCE (Link to Submission Folder)

Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Susan Legutko cc Karen McMillan
1. Financial Accounting					
Evidence of fiscal accounting system for various funds – General, Special Revenue, Capital Outlay.	Y			Monthly Financial Reports	
Evidence that expenditures do not exceed available resources in each fund. (Maintained adequate cash flow to meet salary and benefit requirements.)	Y				
(Maintain an adequate fund balance.)					
Evidence that monthly financial statements and budget amendments are filed timely with the District.	Y				
Evidence that annual audit is consistent with GASB 34 requirements and submitted by the required date.	Y				
Evidence that the Annual Report includes documentation of charter school's financial status.	Y				
Evidence of financial accounting policies and procedures. (Copy of and access to procedures manual)	Y				
Evidence that capital projects allocations are expended in accordance with approved plan. (If applicable.)	Y				
Evidence of a property inventory, records, and asset tags		P		Incomplete data: purchase date, cost,	
Evidence of internal controls and proof of Governing Board approval. (Provide minutes.)			N	No minutes provided	
Evidence of payments and receipts for Teacher Lead Funds.	Y				
2. Grants Accounting					
Established grant accounting procedures.	Y				
Evidence that grant files are adequately maintained. (Access to grant files.) If applicable.					
Grant proposal					
Correspondence to & from Finance					
Expenditure records	Y				
Budget amendments					
Inventory list of equipment					
Personnel logs					

FACILITIES & OPERATIONS (Link to Submission Folder)					
Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Bryce Ellis and Michael Kemp cc Karen McMillan
There are no religious symbols, statues, artifacts, etc. on or about the property and facility where the school operates. If school is located in a church facility, religious symbols must be covered while school is in session.	Y				
Safety					
All 3 required health, fire & safety, and sanitation inspections are current.	Y				
Emergency exits and evacuation maps are posted in classrooms, offices and hallways.	Y				
Evacuation, fire and safety drills are scheduled, conducted and documented in a timely manner and kept on file. Evident in district portal.	Y				
Food Services					
Food service facilities are clean, operational, and well maintained.	Y				
Food service plan is in place including provision of free/reduced priced lunches; healthy food options are available to students.	Y				
Free and reduced lunch applications are current and on file.	Y				
Required food service inspection is posted in food service area.	Y				

RECORDS & COMMUNICATION (Link to Submission Folder)

Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Kelli Mulford cc Karen McMillan
Application process does not create a barrier or inequitable opportunity to access the school. Provide copy of application form.				Unchanged	
Lottery process and documentation are publicly available on the school's website.				Unchanged	
Enrollment/Registration procedures are clear and consistent and follow state statute; and include the Home Language Survey (HLS) and Date of Entry into the US School. (DEUSS). Provide copy of registration form.				Unchanged	
Cumulative records are in a secure location, locked in a fireproof cabinet/room; are maintained in an orderly manner for each student and accessible to staff. Recommendation: Organize student records according to the Cumulative Folder Checklist (SB87100) to ensure accurate record keeping.	Y			District reviewed three random files pulled by district staff. Please see notes below: 317471 - complete with no issues 309136 - Health folder missing (birth cert, 680, physical) and not uploaded in SIS. No registration in file. 312143 - complete with no issues Please ensure duplicate records are removed from student files such as shot records, physicals, birth certificates. Only keep most recent document from this list.	
Parent notification policy is in place to keep parents informed of student progress, programs, testing dates, attendance, the availability of academic assistance, the student code of conduct, teacher qualification, contacting the governing board and board meeting schedule/notices.	Y				
Auditable attendance documents, including withdrawal forms are established and maintained in an organized manner.	Y			Binder is kept with withdrawal forms and attendance notes in an organized manner.	
Health services are managed appropriately, including the administering of medication.		P		Medicine cabinet was not locked upon entering the clinic. Clinic staff was at the front desk upon audit check which left clinic unmanned with an unlocked medicine cabinet. Clinic staff stated she did not have her keys with her this day.	
Cumulative health records are maintained for each student, including immunization certification and school health exam.	Y			Upon review of cumulative files, 1 of the 3 we reviewed was missing the health folder with the required documents.	

EXCEPTIONAL STUDENT EDUCATION (ESE) (Link to Submission Folder)

	Y	P	N		School's Response to Cure Partial and Non-Compliance Share response to cure with Teresa Carlson, *Gifted-Jessica Ehlinger, *504-Erika Gilbert cc Karen McMillan
Criteria				Review Feedback	
Gifted Services					
Evidence that the school follows the District's Admissions and Placement Manual related to SST. (Screening, correct cut-off scores, correct permission signed, etc.)	Y			The school administers a universal screening to first grade students, mirroring CCDS Revision of Plan to Increase Access of Under-Represented Students in Gifted Programs.	
Evidence that the school follows the District's Admissions and Placement Manual related to eligibility meetings to ensure meetings are held within a reasonable amount of time after all evaluations are completed.	Y				
Evidence that the school follows the District's Admissions and Placement Manual to develop EP plans.			N	There are several discrepancies in regards to the frequency of services and the goal page. According the the A&P Manual: Frequency of Services – Indicate how often the services indicated will be provided. Measurable Goals and Short Term Objectives – Based on the student's present level of performance, identify at least one measurable goal with two short term objectives that identify what knowledge, skills, and/or abilities beyond the general curriculum the student will be expected to master.	
Educational Plans (EP) are current and compliant.		P		Interims/Amendments may need to be held to address missing or incorrect elements regarding gifted services on 5 EP/IEPs. Suggestions: Ensure the appropriate case managers are assigned in Synergy Ensure all students identified as gifted-only are in an Education Plan (Gifted) process in Synergy	
Gifted services match the EP and are delivered by a certified gifted teacher.		P		The gifted teacher is welcome to attend district trainings for policy and procedure updates, information on best practices, and support with new systems.	
Teachers of gifted have completed identified EP trainings.	Y			The gifted teacher is welcome to attend district trainings for policy and procedure updates, information on best practices, and support with new systems. The gifted teacher does not currently have their endorsement and there is no evidence that they have completed coursework through an approved program. For re-appointment, they will need to successfully complete two gifted endorsement courses through an approved institution and submit the certificates prior to June 30, 2022.	
Teacher of gifted has gifted endorsement.			N	The gifted teacher is welcome to attend district trainings for policy and procedure updates, information on best practices, and support with new systems. The gifted teacher does not currently have their endorsement and there is no evidence that they have completed coursework through an approved program. For re-appointment, they will need to successfully complete two gifted endorsement courses through an approved institution and submit the certificates prior to June 30, 2022.	
ESE Services					
Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance
Evidence that the school follows the District's Admissions and Placement Manual pertaining to the completeness & timeliness of Prior Parent Notification (PPN).			N	Random IEPs were chosen and the Meeting Participation did not always match 331384: Purpose of meeting incorrect- 1 and 3 should have been checked since consent for re-evaluation occurred	
Evidence that the school follows the District's Admissions and Placement Manual related to providing Procedural Safeguards. Procedural Safeguards are/were provided and explained to parent as outlined (annual review, evaluation, significant discipline and per parent request).	Y			In an interview with the ESE Staffing Specialist there is evidence of this at meetings.	
Evidence that the school follows the District's Admissions and Placement Manual related to eligibility meetings. Eligibility meetings are scheduled within best practice guidelines and all documents are properly drafted prior to holding the meeting.			N	Language eligibilities held without any indication of MTSS	

Appropriate original documentation and forms are filed in the ESE folder housed in the cumulative record.	Y			ESE files are housed in cumulative file room which is locked with only 3-4 employees having access and cabinets locked	
All student information is updated in District's SIS. Eligibility, FBA, Matrix, Transition Consent, etc.)		P		Based upon Synergy report that was pulled from the IEPs sampled there were five IEPs out of compliance- two IEPs on Synergy report had outdated three year reevaluation dates Case managers need to be updated- who monitors the IEPs for students incorrectly assigned?	
IEPs are current and compliant.			N	Case managers are not assigned to all students with IEPs. 21 IEPs have ESE staffing specialist listed, 73 have admin support assigned. Without case managers correctly identified who is progress monitoring these IEPs, and how is progress shared with parents? Best practice would be to write a draft IEP prior to meetings that ESE staffing specialist can preview prior to meeting. There have been times when IEPs are being written at the table and meetings are not efficient and parents are having to wait as a result due to scheduling of back to back meetings.	
ESE Personnel have completed mandatory trainings.	Y			The ESE Staffing Specialists provides training to the ESE teachers.	
General education teachers are implementing and documenting the use of accommodations noted on the IEP.	Y			Based upon interview with AP, accommodations are provided to teachers of general education at the beginning of each year and as IEPs are amended they are made aware of any changes.	
General education teachers are participants in IEP meetings (providing planning notes, advising on Present Level statements, providing input related to goals, services, and accommodations, etc.)	Y			Based upon IEPs that were pulled, teachers of general education were easily identified on signature pages of IEPs. Present level statements reflected input from teachers of general education	
Required three year reevaluations are completed on or before the due date.		P		3 year re-eval date incorrect for two students	
ESE students are placed in the Least Restrictive Environment (LRE) according to their IEP's. Service delivery models implemented at the school aligns with the level of service indicated in the application.	Y			From the IEPs that were randomly selected, it appeared that there were matching services from one student to the other. For example, four times a week SF for ELA and four times a week SF for Math appeared to be a theme. Services should be individualized based upon student need.	
ESE & related services are being delivered as outlined in the student's current IEP. (SIS & documentation logs indicating dates, times & goals addressed, as well as progress monitoring data)			N	Therapy services (speech & language) not provided due to IEP meetings (all day Tuesday set for IEP meetings currently) and cancellation for admin. duties? and testing. Suggestion: Look at schedules (build in testing time and planning time) some students seen individually, consider grouping when possible based on IEP. Also, a single digital spreadsheet would help to include: student name, IEP and re-evaluation due dates, scheduled days and time for therapy, etc. rather than handwritten information on multiple pages (the spreadsheet would be easier to update information and any schedule changes). Random IEPs were chosen and progress monitoring of goals could not be found in ESE Star or Synergy on randomly selected students for academics	
ESE Documentation is distributed to all relevant parties, filed in the cumulative folder and updated as necessary in the SIS.	Y			A locking cabinet and file room is utilized and records are maintained in the cabinets. In an interview it was shared that 3-4 staff have access to the cabinet.	
The Matrix is completed at the initial placement and after each IEP meeting for a 254 or 255 student by trained personnel.	Y			The school is not reporting any students at a 254 or 255. Based on a review of random IEPs, no files of students initially placed were reviewed.	
o. The process for students transferring from out-of-state and out-of-county is followed.	Y			Random IEPs were chosen and the procedures for students transferring from out-of-state and out-of-county were followed for the one transfer student sampled.	
504 Services					
Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance

Evidence that the school follows the District's 504 Procedures regarding evaluations, including the provision that 504 meetings are held within reasonable time period.		P	It is evident that the school is working through the 504 caseload. With increased knowledge and training, adherence to the procedures will likely improve. I viewed 286926, the	
Evidence that initial eligibility meetings are held and the plan is developed (if applicable).		P	I viewed the initial eligibility paperwork for 331110. it looks like the process was followed correctly. It appears that the Eligibilities I viewed were initiated a few months ago. The turnaround time for followup and progressing through the process needs to be more timely.	
504 documents are filed in the cumulative folder.	Y		The cumulative folders are stored in a locked cumulative room with limited access.	
504 Personnel have completed 504 trainings.		N	School personnel have engaged with me regarding questions or concerns, as needed. No one has attended a formal Section 504 training.	
504 Plans are current and compliant.		N	Of the estimated 65 active 504 plans, there are 28 currently overdue. The Section 504 Coordinator needs to be uniformly identified as the current Section 504 Coordinator.	
General education teachers are implementing and documenting use of accommodations noted on the 504 Plan.		N	At the time of visit, the documentation was not visible.	
Student information is updated in District's SIS.		P	Random IEPs were chosen and the procedures for students transferring from out-of-state and out-of county were followed for the one transfer student sampled.	

ENGLISH LANGUAGE LEARNERS (ELL) SERVICES (Link to Submission Folder)

Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Ryan Widdoson cc Karen McMillan
School has written enrollment procedures in place and followed which assures: a) The Home Language Survey (HLS) is completed; b) HLS Reviewed for accuracy and any "yes" responses; c) HLS provided to school's ESOL personnel for review—in a timely manner. d) Data personnel codes all students new to CCDS with "yes" responses on the HLS as "LP" in the SIS.		P		There are written enrollment procedures. However, the task of entering the codes/data into the SIS has been problematic.	
Potential ELL students are screened for entry into the ESOL program within 20 school days of enrollment in accordance with timelines written in Florida Rule 6A-6.0902 - Requirements for Identification, Eligibility, and Programmatic Assessments of English Language Learners.			N	In reviewing folders and speaking with staff, there are students who were not tested within the state required timeline. Some have not been tested at all. ELL Coordinator is aware of this and working diligently to complete required tasks.	
All ELL Student Plans have been updated by October 1st of each school year, printed, and signed by Date Certain for ALL LY students, as well as newly designated LF students.	Y			Attestation sheets are signed by teachers when they receive their student plans. Recommendation that those forms live in each individual students' folder	
ELL students with a Date Entered US School (DEUSS) of three or more years have had a meeting with the ELL Committee, with the parent invited, and the meeting was finalized in the Ellevation platform. This must be completed within the required period to determine whether a student exits or remains in program.			N	There is no evidence that these meetings are taking place. Evidence could include: calendar invitations, meeting agendas, anecdotal records.	
All Student Meeting Report documents are printed and signed on the day of the committee meeting.			N	Do not see evidence of meetings in the red folders.	
All required original documents are housed in the ELL records folder with copies of all documents kept in a resource (backup) file.			N	ELL records folders are not up today. The ELL coordinator is working diligently to complete all existing folders and to open ELL folders in a systematic way.	
All student ELL information has been correctly entered and updated in the District's SIS by Date Certain for FTE Surveys 2 & 3.		P		District staff supported CCA with Survey 2. Survey 3 lists do not appear to be up to date.	
School has held two (2) parent involvement opportunities specifically for parents of ELL students;			N	There is no evidence that these opportunities are taking place Evidence could include: invitations, flyers, sign-in sheets, agendas, photographs of events.	
ELL Strategy Checklists are provided to teachers of ELL students and available with lesson plans for review.	Y			ELL Coordinator ensures that teachers have strategies to support student learning.	
Monitoring of LF students is completed at the appropriate time, per the schedule provided in the Programmatic Handbook, and based on student's exit date. Dates are visible in the Ellevation platform with data correctly entered into the District's SIS.			N	There is no evidence that monitoring is taking place. The ELL Coordinator shared that they are aware of this need and are working towards this practice	
The ELL Committee meets to discuss ELL student retention as evidenced in the Ellevation platform.			N	There is no evidence that this work is taking place. Evidence could include calendar invitations, sign-in sheets, meeting agendas and anecdotal records.	

CURRICULUM & TEACHING (Link to Submission Folder)

Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Bianca Montoro and if *MTSS-Robn Rae cc Karen McMillan
An evidence-based reading program is being implemented as designed on a consistent basis for reading interventions/intensive reading for Level 1 and 2 students.			N	During classroom visits, the evidence based reading program was observed as present in the classroom and portions of the lesson were referenced on the board. However, the student materials from the curriculum were not being utilized. The materials observed in use by students were "worksheet packets" and online programs (e.g. ABC Mouse).	
Evidence-based supplemental reading intervention materials are being used to support the reading program.			N	Evidence-based supplemental reading intervention materials are listed in the CCUSA-Clay Reading plan. However, evidence of the use of these materials was not present during the walkthrough. The sample lesson plans and the "Small Groupings PDF" do not provide documentation that these materials are being implemented.	
An evidence-based core ELA program is being implemented on a consistent basis that aligns to Florida Standards and the FLDOE instructional materials adoption list.		P		-Minimal evidence of the core ELA programs outlined in the 2021-2022 CCA Reading Plan being implemented on a consistent basis: Packets of handouts containing items from multiple sources not aligned with the adopted core instructional materials, students using materials and resources from past adopted curriculum in K-2 (Wonders) (TPT) -Adopted core curriculum was observed to be in classrooms, but not being used as outlined on the Teacher Curriculum List in the CCA Submission Folder -An overreliance of technology and digital materials: students were observed interacting with the digital curriculum but could not articulate the purpose of doing so when questioned other than it's what they are told to do or they have to complete so many minutes, some students were accessing other sites while others were drawing or coloring and not engaged in the online learning content	
Reading intervention teachers are reading certified or reading endorsed. Administrator has a plan in place for how to manage this requirement at the school.		P		The last sentence of paragraph 2 on page 8 of the 2021-2022 CCA Reading Plan states, "CSUSA Clay County Schools will follow the district's guidelines for 1011.62(9), F.S., Reading Endorsement and outlined in House Bill 7055, all students in grades kindergarten through 12 requiring Tier III intensive reading interventions will be taught by a teacher who is certified or endorsed in reading." Implementation of this process is unknown. A more detailed description of how the district's guidelines align with CCA's procedures is needed, or review of Tier III intervention records.	
Evidence that professional development opportunities are made available to teachers and are in alignment with the schools continuous improvement needs. Provide list of school's continuous improvement need. PD schedule, agendas, inservice records, etc.	Y				
Lesson Plan Review Look Fors:					

Subject areas and grade levels clearly identified in the lesson plans.	Y			
Delivery method the teacher will use to meet the instructional target is clearly identified in the lesson plan. Lessons are targeted to Florida Standards and specific student objectives.	Y			
ESOL strategies and accommodations are clearly identified in the lesson plans, and by lesson.	Y			
ESE accommodations are clearly identified in the lesson plans and identified by student.	Y			
504 accommodations are clearly identified in the lesson plans and identified by student.	Y			
Instruction is differentiated (based on data) to meet the needs of all students, both whole and small groupings. Differentiated instructional strategies (whole vs. small group) are clearly identified in the lesson plans.		P	Review of electronically submitted lesson plans reveals identification of students for differentiated instruction as well as the materials used for instruction in Grades Kindergarten and 2nd only. 5th and 8th grade lesson plan sample indicates small group work is in place; however, no teacher led small group instruction is outlined.	
FSA ELA Level 1 and 2 students are receiving the required reading intervention to meet their specific needs. Instructional time is identified in the school's master schedule.		P	A scheduled time for interventions is built into the master schedule and is a part of the school's CCRP. However, this is not indicated in scheduling in Synergy.	
MTSS Review Look-Fors				
An MTSS Team is conducting data analysis, analyzing progress monitoring reports, and providing meeting discussion notes.		P	Meeting notes (prior to 01/2022) are provided digitally; however, there is minimal evidence that these are representative of discussion notes with teachers.	
Multi-tiered Systems of Support (MTSS) are in place to support students requiring interventions in academics, attendance, and behavior.	Y			
The school utilizes relevant data, including FSA ELA & Math results and universal screening data, to identify students in need of Tier II supplemental and Tier III intensive interventions.			N CCUSA-Clay's electronically submitted documentation of the students receiving Tier 2 and Tier 3 interventions reflects the students who had plans in the 2020-21 academic year. When cross-referenced with current Tier 2 and Tier 3 plans listed in Synergy, these students were not listed. The students (3 total - 02/28/2022) listed as having plans in Synergy are in the 1st and 2nd grades and would not have FSA data. Digital documentation suggests that MAP data is used to determine instructional groupings, but no evidence is provided that indicates that targeted or intensive interventions are being provided.	

Evidence of scheduled Tier II and Tier III intensive interventions occurring on a consistent basis.			N	Green folders were observed to be present in the classrooms that were visited. However, no evidence of interventions being provided was observed. Review of contents of green folders as well as digital progress monitoring examples revealed that progress monitoring is occurring. However, no evidence of evidence-based Tier 2 and Tier 3 interventions was present.	
The school has implemented a process to track and monitor student retentions (current year retainees and students retained two or more times).			N	Evidence not observed in electronic submissions.	
Evidence of a course recovery/grade forgiveness process.			N	Evidence not observed in electronic submissions.	

ASSESSMENT (Link to Submission Folder)					
Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Steve Amburgey cc Karen McMillan
Students participate in all age appropriate state assessments. (percentage of students tested)	Y				
There is a designated state certified test coordinator who attends required District meetings.	Y				
Evidence of a school-wide assessment plan that includes baseline, progress monitoring, formatives, and summative assessments for all grade levels, including a norm-referenced test (NRT) for grades 1 and 2 as applicable, and assesses all students periodically throughout the school year.	Y				
Evidence that staff receives training in test administration (sign-ins/agendas, maintained record of security agreements).	Y				

HUMAN RESOURCES/CERTIFICATION (Link to Submission Folder)

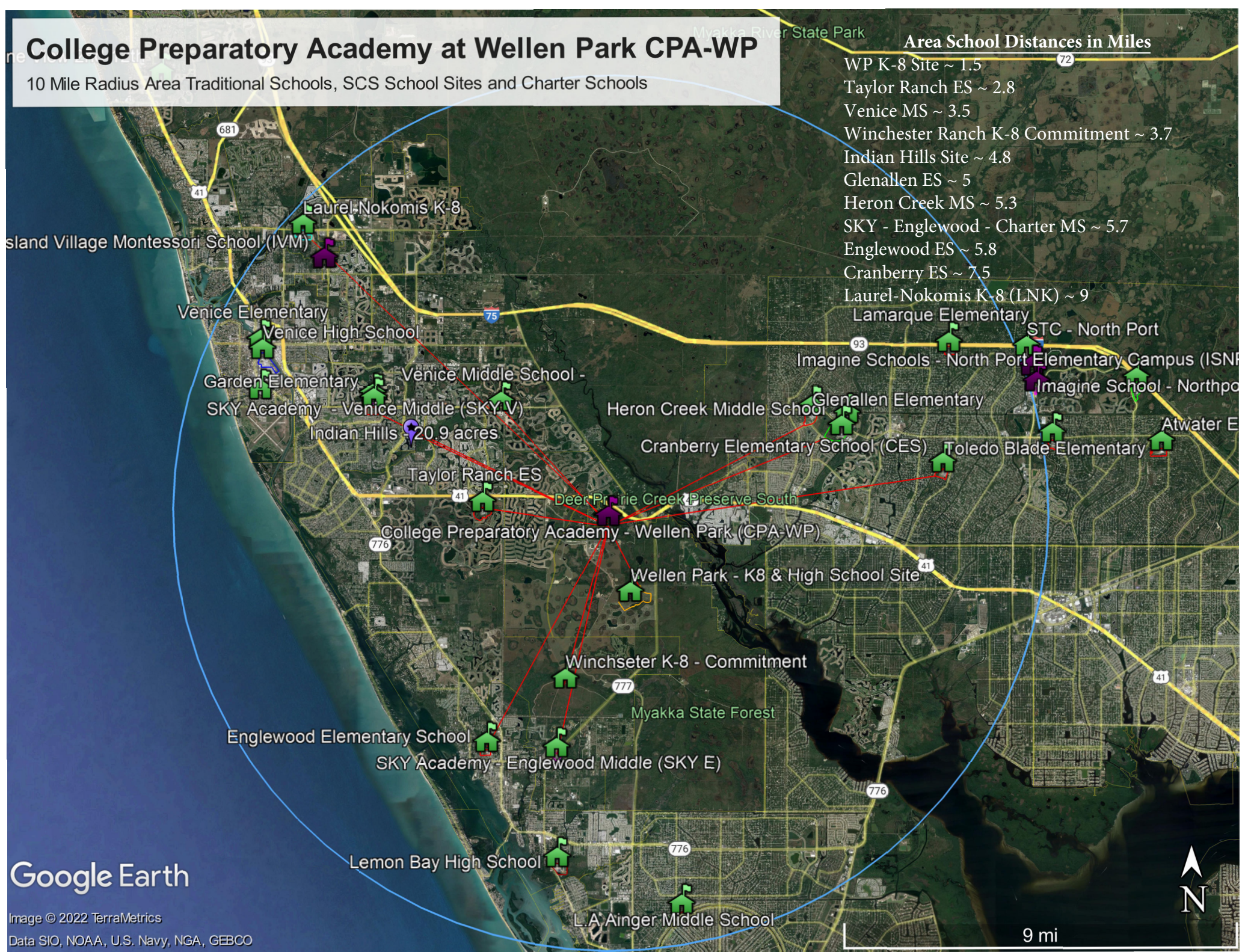
Criteria	Y	P	N	Review Feedback	School's Response to Cure Partial and Non-Compliance Share response to cure with Jeff Schriver and Samantha Wright cc Karen McMillan
Policies and procedures for the appointment, compensation, promotion, suspension and dismissal of employees are documented and approved by the Governing Board. (Evidenced in minutes).	Y				
b. Teachers are appropriately certified, endorsed or licensed.			N	Approximately 40% of teachers were not certified or licensed for the course codes listed in their schedule.	
c. Out of field teachers have been shared with the district and the charter school board and have been communicated to parents by October and February FTE. (Out-of-field letters).			N	No evidence of OOF on website. No teacher's were labeled OOF and no OOF paperwork was completed. No parents were notified.	
d. A complete list of charter school employees is available and includes the employee's name and job assignment(s).			N	Approximately 40% of teachers' job assignments were incorrect. 4 or 5 teacher's were still listed as active when they had terminated employment.	
e. Personnel files are maintained appropriately including copies of the following documents, preferably in this order: Copy of Employment Application Copy of Employment Contract Job description Proof of Fingerprints on file Copy of teaching certificate/license Copy of I-9 & W-4 Copy of ID Evaluations		P		All files did not include copies of certifications/licenses.	

College Preparatory Academy at Wellen Park CPA-WP

10 Mile Radius Area Traditional Schools, SCS School Sites and Charter Schools

Area School Distances in Miles

- WP K-8 Site ~ 1.5
- Taylor Ranch ES ~ 2.8
- Venice MS ~ 3.5
- Winchester Ranch K-8 Commitment ~ 3.7
- Indian Hills Site ~ 4.8
- Glenallen ES ~ 5
- Heron Creek MS ~ 5.3
- SKY - Englewood - Charter MS ~ 5.7
- Englewood ES ~ 5.8
- Cranberry ES ~ 7.5
- Laurel-Nokomis K-8 (LNK) ~ 9
- Lamarque Elementary
- STC - North Port



Google Earth

Image © 2022 TerraMetrics
Data SIO, NOAA, U.S. Navy, NGA, GEBCO

9 mi



April 12, 2022 Board Meeting
Agenda Item 10.

Title

MEMBERS COMMENTS

Description

Recommendation

Contact

GOODWIN

Financial Impact