



*Somerset Academy, Inc. submits to  
Broward County Public Schools:*

# **SOMERSET PARKS ACADEMY CHARTER SCHOOL**

**MODEL FLORIDA CHARTER SCHOOL APPLICATION**

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## APPLICATION COVER SHEET

NAME OF PROPOSED CHARTER SCHOOL: SOMERSET PARKS ACADEMY CHARTER SCHOOL

NAME OF NONPROFIT ORGANIZATION/MUNICIPALITY UNDER WHICH CHARTER WILL BE ORGANIZED OR OPERATED: SOMERSET ACADEMY, INC.

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

NAME OF CONTACT PERSON: LISA ARNEAUD

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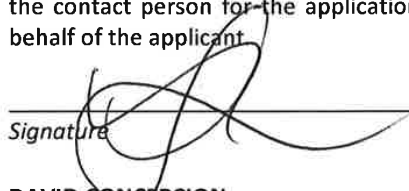
NAME OF EDUCATION SERVICE PROVIDER (if any): ACADEMICA

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

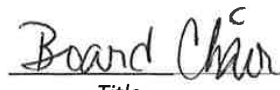
Projected School Opening: AUGUST 2016

| School Year | Grade Levels | Total Projected Student Enrollment | Student Enrollment Capacity (if known) |
|-------------|--------------|------------------------------------|----------------------------------------|
| First Year  | K-5          | 395                                |                                        |
| Second Year | K-5          | 515                                |                                        |
| Third Year  | K-5          | 625                                |                                        |
| Fourth Year | K-5          | 648                                |                                        |
| Fifth Year  | K-5          | 648                                |                                        |

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

  
Signature

DAVID CONCEPCION  
Printed Name

  
Title

July 28, 2015  
Date

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## I. EDUCATIONAL PLAN

### Section 1: Mission, Guiding Principles and Purpose

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

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

***The mission of Somerset Parks Academy Charter School is to provide a safe, inspiring technology-infused environment, motivating students to excel in academic and personal achievement.***

This mission will serve as a catalyst between the intricate balance of the academics and arts, curriculum and culture, achieving and student success. This mission will lay the foundation and promote the development of responsible and passionate learners, which will allow our students to acquire the knowledge and skills essential to achieving their full potential.

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

Somerset Parks Academy Charter School, hereinafter referred to as “the School,” will impart a thorough academic curriculum in an environment that is both nurturing and creatively stimulating. In accordance with the law, the School will be guided by the following principles:

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

In accordance with the law, the School will “meet high standards of student achievement while providing parents flexibility to choose among diverse educational opportunities within the state’s public school system.” The School will provide a highly-rigorous academic curriculum and environment that sets high expectations for all students, teachers, parents, and staff members. Through implementation of the strategies fully addressed in this application, the School will exceed high standards of student achievement by:

- ❖ Providing a vigorous educational program vital for each child’s scholastic success. This will be accomplished through a variety of methods including, but not limited to:
  - Progress monitoring of students’ mastery of the Florida Standards, in accordance with the Florida Assessments for Instruction in Reading (FAIR),
  - Communicating the academic needs of each student with parents in a formalized conference protocol,
  - Providing teachers with professional development on addressing the diverse instructional needs of students in the general education classroom,
  - Utilizing an ongoing cyclical assessment model of diagnostic, formative and summative assessments,

- Monitoring of data binders at both the classroom and school-site levels,
- Infusing literacy and mathematics skills into electives and specials curricula
- ❖ Delivering a dynamic school curriculum, including emphasis given to student-centered instruction towards student mastery of the Florida Standards when applicable.
- ❖ Complementing and enhancing classroom studies through premium curricular and arts infused extra-curricular programs.
- ❖ Providing opportunities for involvement of students and families while nurturing deep roots with community partners in the educational process through a School Advisory Council (SAC) and the development of a Parent Teacher Student Organization (PTSO).
- ❖ Employing mechanisms to continuously monitor, evaluate, and improve curriculum to achieve continuous student improvement year to year.
- ❖ Utilizing strong, technologically rich academic programs and tools to assist and increase a multi-sensory learning experience.

The establishment of the School will provide parents flexibility to choose among diverse educational opportunities within the public school system. Through an assertive, non-discriminatory marketing plan, as detailed in this application, the School will make certain to inform parents and the community of the educational opportunities available for their children. Working alongside neighborhood partners and community members, the School will offer them additional choices within the state's public school system.

**Promote enhanced academic success and financial efficiency by aligning responsibility and accountability** The School promotes financial efficiency and will be accountable to its students, their families and other stakeholders by providing a quality education in a responsible, cost-effective manner. In order to align the plan for academic success with financial efficiency, the School will gather pertinent data relative to its student body and subsequently set goals to target student performance and achievement. Before purchasing programs that would be used at the School, a cost-benefit analysis would take place to ensure its addition to the curriculum would both meet the School's goals as well as be a financially secure investment. Some of the criteria for choosing a new program would include: the per-student cost; the standards and skills the program aims to target; the research behind the program's claims to success; consideration of the technological demands of the program, both on-site and at-home; the reporting capabilities for students, parents, teachers and school administrators; as well as the feasibility of utilizing the program for instruction and assessment

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

academic success.

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

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

[Provide parents with sufficient information on whether their child is reading at grade level and whether the child gains at least a year's worth of learning for every year spent in the charter school](#) Consistent with the Just Read Florida! Initiative, the School will provide parents with standards based assessment results (i.e. FAIR, FSA, SAT) on a yearly basis. This means of communication informs parents whether or not their child is reading at grade level and whether or not their child has gained a year's worth of learning for every year spent at the School.

Through detailed assessment of academic performance using standardized test scores and other assessments the School will: Identify students who are a level below, at grade level, or a level above grade level; and communicate this to parents;

- ❖ Identify those students not making learning gains toward the Florida Standards and institute applicable measures for improvement (and communicate the baseline, the intervention strategies, and the progress of those interventions, in the manner identified herein this charter school petition); and
- ❖ Report student progress throughout the academic school year via a standards-based means of grade assignment for report cards (grades will be assigned in consideration of Florida Standards when applicable mastery).

In addition, ongoing communication regarding the child's progress will occur between the School and the parents through interim progress reports (sent home midway through each quarter as outlined on the school's calendar) and quarterly report cards (sent home at the end of the quarter and also outlined on the school's calendar).

The School will strive to maintain an open channel of communication with parents and other stakeholders at all times and will continuously update and track student progress into TERMS.

Other various forms of communication include:

- ❖ [Virtual Counselor](#)- An online portal which gives parents/guardians access to students' cumulative academic and assessment history with regard to grades, standardized test scores, IEPs, ELL Plans and attendance.
- ❖ [Somerset's Parent Academy \(SPA\)](#)- informs parents of standardized tests requirements and objectives. SPA helps to take the fear out of test taking and will be advertised throughout the school year.
- ❖ [ME Day](#)- Teachers meet individually with students to discuss test scores and individual progress being made throughout the year. The student and teacher collectively create manageable goals for the student, as well as an execution plan, to help them excel. This plan is communicated with parents in addition to regular parent/teacher conferences.
- ❖ [Parent/Teacher Conferences](#)- Teachers are responsible for meeting with each student's parents/guardians face-to-face at least twice during the school year, in addition to regular telephone and electronic communication. Math and Literacy Coaches also meet with parents/guardians separately on an as-needed basis.
- ❖ [Somerset school website](#)- the School's website will consistently be updated by administration and staff. Parents will also be empowered to receive daily text messages in regards to their child's daily homework assignments and progress in class.

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

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

**[Improve student learning and academic achievement](#)** The School will offer a well-rounded educational program that holds the School and its students accountable for meeting self-imposed goals and standards, as well as those required by the State of Florida and Broward County Public Schools. The educational philosophy of the School is geared toward increasing learning opportunities and raising the academic achievement of all its students. To meet this goal, the School commits to:

- ❖ Deliver increased learning opportunities for all its students, by providing challenging curriculum within a nurturing, quality learning environment;
- ❖ Design and implement a continuous improvement methodology wherein student assessment results offer opportunities for differentiated and targeted instruction tailored to students' individual needs, ensuring consistent increased student achievement outcomes;
- ❖ Expect and encourage that all students will realize their highest academic potential, especially in the core subjects of English language arts, literacy, mathematics, science and social studies, as well as providing the means for these students to reach their potential;
- ❖ Match or surpass the average student academic performance of the local district in all required public accountability tests, (e.g. Florida Standards Assessment [FSA]); and
- ❖ Seek out, establish, and maintain sound, mutually beneficial partnerships with local education and civic institutions to provide a wide array of educational experiences for students to enjoy continued learning opportunities beyond the immediate classroom setting.

The school's educational program is aligned to specific innovative learning methods and strategies -

with emphasis on individual student learning gains- that have proven successful in raising student learning and achievement. These include but are not limited to:

- ❖ Teachers following the 4 domains of Marzano's Framework, including school-wide rubrics evident in every classroom in addition to task-based rubrics for various class activities
- ❖ A standards-based curriculum infusing a thematic approach to integrate core areas of study such as mathematics, literacy, English language arts, science, and social studies.
- ❖ Appropriate assessments for learning utilizing the diagnostic-formative-summative assessment cycle model
- ❖ Data-driven high quality differentiated instruction
- ❖ Supplemental programs for student advancement and remediation
- ❖ Support for teachers and ongoing professional development

The School will be part of the Somerset Academy, Inc. system, which has yielded close to 50 high performing charter school programs in grades K-12 throughout the state of Florida. Somerset Academy has developed a multi-tier system (management, assessment, instruction and professional development) that integrates technology within the core curriculum and achieves increased performance across all student populations and subgroups. Somerset Academy has been able to implement unique and innovative strategies aimed at student achievement and have proven these strategies to be successful with all student populations, including students with special needs (ESE) and English Language Learners (ELL). The results on standardized exams and learning gains, especially in mathematics, have proven its success. Furthermore, Somerset Academy, Inc. has the combination of experience and a demonstrated track record of success with its programs that will promote increased student achievement across the county.

Increase learning opportunities for all students, with a special emphasis on low-performing students and reading Reading proficiency is of the highest importance to the School, and thus, is the main focus of the curriculum. As such, implementation of Broward County Public School's K-12 Comprehensive Core Reading Program (CCRP) will be implemented with integrity. In addition the School will increase learning opportunities for all students through careful, continuous monitoring and assessment of student performance. Emphasis will be placed on low performing students, beginning with identification of those not making adequate progress and/or not demonstrating mastery of the Florida Standards, or FAIR when applicable. Differentiated instruction methods and other appropriate measures for targeted instruction will then be instituted for these students, and those who are not performing at grade level will be placed on a Progress Monitoring Plan (PMP).

Further, the School's curriculum will serve students of all ability levels in accordance with the Florida Standards when applicable. Remedial students and students with special learning needs will have access to supervised study time and tutoring after school (and possibly on Saturdays, as well) to accelerate their progress. Reading Camp before school with a student to teacher ratio of 1:11. Push in and Pull out intervention programs will also be put into place. ELL students will have a certified ESOL instructor. In addition, students performing at grade level will be offered similar opportunities in order to maximize their potential and advance their progress. Students who are excelling at grade level work will be given an opportunity to maximize their learning in a High Achieving Classroom.

### Encourage the use of innovative learning methods

Innovative programs, inclusive of the use of technology, online resources, computer apps, and creative teaching techniques to name a few, will be incorporated into the curriculum framework. The school accepts the curriculum of Broward County Public Schools as its basic curriculum; however will not be restricted to the content of the curriculum, and whenever appropriate will introduce new elements to the courses offered.

The innovation of the School will not rely solely on the delivery of the Florida Standards where applicable nor in mastery of these standards by the students; however, will be in the variety of instructional methods used by the teachers to deliver the coursework and programs that are used to assist in student achievement and success. Somerset's platform and model allows for creative teaching methods and access to new and state-of-the-art programs that can be implemented and tried in and out of the classroom. While setting high academic expectations for all students, the School will provide students with the means to reach their academic goals, through differentiated instruction methodology, and hands-on inquiry-based investigations in their coursework. Effort will be made to ensure all students are able to engage in the curriculum conducive to teaching methods that cater to his/her learning style. Furthermore, the School is designed to offer a disciplined, balanced and enriched education of the highest quality, and to prepare them for a successful middle and high school education.

### Require the measurement of learning outcomes

The School's educational philosophy, its core values and beliefs, are focused on student's intellectual and social development using innovative learning methods. These values and beliefs have been aligned to innovative instructional strategies that have proven to raise student learning and achievement at all levels.

Additionally, educators will be expected to "break the mold" in terms of teaching techniques. All students learn differently and teachers will be required to adapt their teaching styles to fit the learning needs of their students. While the School accepts the curriculum of Broward County Public Schools as its basic curriculum, it will not be restricted to the content of the curriculum, and whenever appropriate, will introduce new elements to the courses offered.

Other innovations to be incorporated in the program include but are not limited to:

- ❖ A spiraling integrated approach to learning through discovery and deductive reasoning methods in science and mathematics
- ❖ Parental involvement obligations to ensure, whenever possible, that parents actively participate in the educational process
- ❖ A strong emphasis on civic responsibility and leadership with structured opportunities on campus and through School Community Projects.
- ❖ School-wide emphasis on data analysis in which students are encouraged to self-reflect and participate in the planning and progress monitoring process.
- ❖ Integration of character education within the school day with recognition of students in a thematic, monthly celebration of positive qualities among the student body.

**D. Describe how the charter school will fulfill, the optional purposes of charter schools found in section 1002.33(2)(c), F.S. This section is optional. *In accordance with the law, charter schools may fulfill the following purposes:***

**Create innovative measurement tools.** The school, in conjunction with the measurement tools utilized by our sponsoring school district, will incorporate additional innovative procedures to measure student mastery. These may include online assessments such as Carnegie Cognitive Tutor, Pearson Success Net, Study Island, and Reading Plus to name a few. Frequent mini-benchmark assessments will be used to monitor mastery of Florida State Standards/NGSSS when applicable. Lastly the School will maintain an open policy for additional creative measurement tools, including those that are technology based, that become available.

**Provide rigorous competition within the public school district to stimulate continual improvement in all public schools.** One of the guiding principles of the Somerset Academy program, and of education in general, is that "Success breeds Success." This doctrine is instilled in the rigorous academic curriculum, which sets high expectations and specific, individualized goals for both students and teachers. Given a ten-year plus track record of exemplary academic achievement (*Refer to Table in Section 3*), the existing Somerset educational programs have proven successful. By adopting the educational design of the existing kindergarten through eight grade schools --as evidenced by performance data in Section 3-- the School is expected to have the same academic success in serving similar student populations. Based on the principle that success will breed success, the replication of this model will produce a successful and rigorous program to stimulate continual improvement and success for all public schools within Broward County.

**Expand the capacity of the public school system.**

Over the past 18 years the Somerset Academy brand has proven to be a reputable school option for parents who want to remain in the public school system. Currently 48 Somerset Academy public charter schools flourish in the state of Florida, 21 of which, are a part of the Broward County Public school system. The School understands its responsibility in expanding the public school system by providing parents with a high quality school option within the state's public education system. The School will offer to provide parents a viable option to those who are seeking a rigorous, individualized educational experience for their children.

**Mitigate the educational impact created by the development of new residential dwelling units.**

The school will offer a public school option for families in Broward County as the population of the county continues to grow. Students who reside anywhere in the Broward County will be allowed to attend the school, unlike the traditional public school rule of zoning- which requires students to attend their "local" public school as assigned. This will allow students who are zoned to attend overcrowded schools another choice in education.

**Create new professional opportunities for teachers, including ownership of the learning program at the school site.** Somerset Academy, Inc. currently employs over 700 teachers. The School will generate an opportunity for teachers to participate in an exciting and innovative venture; one that allows them to take ownership over the learning process and feel free to incorporate their unique teaching styles into the classroom. Teachers at the School will feel encouraged to take part in the

advancement of their students' educational lives, communicate with their colleagues, and share effective techniques in an effort to promote the spread of best practices and cutting edge methods. In order to best utilize research-based strategies and implement the school programs, all teaching staff will receive ongoing professional development on the various components of the programs, respectively, to ensure effective implementation.

Teachers and staff will be involved in the development and implementation of all programs, thus making them an integral part of the educational process. Furthermore, at the time of program review, teachers and staff will be invited to offer their comments, discuss findings with colleagues, and make the necessary modifications to ensure students' success.

Continuous growth is also a goal of the School, for teachers as well as students. As such, all instructional staff will be encouraged to participate in professional development programs, conferences, or workshops in order to progress academically, enhance and hone their respective skills, and network amongst other professionals who share their same curricular expertise and have the ability to stay current in their areas of curriculum. The School also promotes communication amongst colleagues, for example, regarding effective techniques and best practices utilized in the classroom. Additionally, teachers will receive training to improve their technology skills and learn effective ways to integrate technology throughout the curriculum.



## Section 2: Target Population and Student Body

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

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

The School will be open to children in Kindergarten through 5<sup>th</sup> grade (approximately 5 to 11 years of age) who would qualify to attend a traditional public school in Broward County. An open admissions policy will be implemented wherein the School will be open to any student residing in the County. The School is expected to have a racial/ethnic population as well as an English Language Learner (ELL) and Exceptional Student population (ESE) reflective of the surrounding the Northwest Broward area schools and community.

**Admission Policy** - In accordance with federal and state anti-discrimination laws and in accordance with the Florida Educational Equity Act, Section 1000.05(2)(a), the School will not discriminate on the basis of race, ethnicity, national origin, gender, or disability against a student in its school admission process. An open admissions policy will be implemented wherein the School will be open to any student residing in the County. Any eligible student, as described in F.S. §1002.33(10), who submits an application (prior to the posted deadline) shall be considered, unless the number of applications exceeds the capacity of the program, class, grade level, or building. In such case, all applicants shall have an equal chance of being admitted through a random selection/lottery process. If the number of applications falls short of the established capacity, supplemental registration periods may be held for the purpose of reaching student capacity.

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

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

In order to minimize any traffic impact caused by the school and ensure that the school is available to serve the residents of the neighborhood where the school is located, the Governing Board of the charter school may elect to limit the enrollment process to target students residing within a

reasonable distance of the school as provided under Florida law.

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

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

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

| <i>Years of Charter</i> | <i>Grades Served</i> | <i>Total # Enrolled</i> | <i>Enrollment Capacity</i> | <i># Students per grade</i> | <i>Approx. # students in each class</i>     |
|-------------------------|----------------------|-------------------------|----------------------------|-----------------------------|---------------------------------------------|
| Year 1:                 | K-5                  | Approx. 395 students    | Up to 650                  | Approx. 100*                | K-5 <sup>th</sup> Grade-up to 20 students** |
| Year 2:                 | K-5                  | Approx. 515 students    | Up to 650                  | Approx. 100*                | K-5 <sup>th</sup> Grade-up to 20 students** |
| Years 3-5:              | K-5                  | Approx. 650 students    | Up to 650                  | Approx. 100*                | K-5 <sup>th</sup> Grade-up to 20 students** |

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

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

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

The student population projections were made using various factors. Consideration includes recently released data on charter school growth in America and Broward County, as well as current waiting lists at Somerset Academy schools in Broward County.

The National Alliance reports that in 2014-2015 charter schools served 348,000 new students throughout the U.S. In Florida alone, charter school enrollment growth hit 251,000 students in the 2014-2015 school year, making it four of the 10 fastest growing charter school populations in the U.S.

For enrollment projects, The School also referred to The School Board of Broward County's five-year enrollment projection for the county<sup>1</sup>. As noted in the charts below and throughout the memo dated November 3, 2014, over the next five years the district is foreseeing a steady increase in charter school enrollment from students who are new to Broward County, those who are currently home-schooled or who attend private schools. Based on Somerset Academy, Inc.'s experience and reputation in Broward County, Somerset Parks Academy is anticipating the enrollment of families wanting to place their children in a reputable public charter school. The growth in charter school enrollment shows that parents continue to demand high-quality educational options for their children.

**Table 1. District School Enrollment**

| DISTRICTWIDE SUMMARY    | Historical Enrollment <sup>H</sup> |                |                |                |                | Projected Enrollment <sup>P</sup> |                |                |                |                |
|-------------------------|------------------------------------|----------------|----------------|----------------|----------------|-----------------------------------|----------------|----------------|----------------|----------------|
|                         | 2010-11                            | 2011-12        | 2012-13        | 2013-14        | 2014-15        | 2015-16                           | 2016-17        | 2017-18        | 2018-19        | 2019-20        |
| TOTAL PreK              | 4,465                              | 4,345          | 4,282          | 4,323          | 4,839          | 4,839                             | 4,839          | 4,839          | 4,839          | 4,839          |
| TOTAL K-5               | 101,344                            | 99,252         | 97,275         | 97,368         | 97,960         | 97,542                            | 97,773         | 99,164         | 100,025        | 101,310        |
| TOTAL 6-8               | 52,369                             | 50,890         | 50,472         | 49,135         | 47,827         | 47,670                            | 47,655         | 48,429         | 49,203         | 48,245         |
| TOTAL 9-12              | 69,516                             | 68,921         | 69,350         | 68,496         | 69,393         | 69,859                            | 70,161         | 70,425         | 70,394         | 70,605         |
| <b>PreK-12 SUBTOTAL</b> | <b>227,694</b>                     | <b>223,408</b> | <b>221,379</b> | <b>219,322</b> | <b>220,019</b> | <b>219,910</b>                    | <b>220,428</b> | <b>222,857</b> | <b>224,461</b> | <b>224,999</b> |
| TOTAL CENTERS           | 5,904                              | 5,906          | 6,138          | 5,633          | 5,330          | 5,330                             | 5,330          | 5,330          | 5,330          | 5,330          |
| <b>DISTRICT TOTAL</b>   | <b>233,598</b>                     | <b>229,314</b> | <b>227,517</b> | <b>224,955</b> | <b>225,349</b> | <b>225,240</b>                    | <b>225,758</b> | <b>228,187</b> | <b>229,791</b> | <b>230,329</b> |

H - Historical enrollment based on the annual benchmark day of school.

P - Projected enrollment reports DSA Department five-year enrollment forecast as of October 2014.

<sup>1</sup> [http://www.broward.k12.fl.us/dsa/Data/1415/2015-20\\_DistrictProjections\\_October.pdf](http://www.broward.k12.fl.us/dsa/Data/1415/2015-20_DistrictProjections_October.pdf)  
<http://www.publiccharters.org/press/5-reasons-celebrate-national-charter-schools-week/>  
<http://www.fldoe.org/schools/school-choice/charter-schools/>  
<http://dashboard.publiccharters.org/dashboard/performance/page/overview/state/FL/year/2011>

### Section 3: Educational Program Design

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

**K-5 Daily Schedule:** The School will follow the annual calendar set forth by the sponsor, requiring at least a minimum of 180 days of instruction per calendar year. The hours of instructional time are aligned with state and district requirements for elementary school grades, including the Florida Standards when applicable, as adopted.

Students in grades K-5 receive instruction in the areas of English Language Arts, reading, mathematics, science, social studies, and physical education. In addition, students will have special area instruction in foreign language, music, science lab and media on a weekly basis.

The instructional day at the School is expected to commence at 8:30 am and end at 3:00 pm each day.

The instructional day at the school for Kindergarten through Fifth Grade will begin at 8:30 am (time) each day.

The instructional day at the school for Kindergarten and First Grade will end at 2:00pm (time) each day.

Minutes of instruction each day for Kindergarten through First Grade will be approximately 300\*.

The instructional day at the school for Second through Fifth Grade will end at 3:00pm (time) each day.

Minutes of instruction each day for Second through Fifth Grade will be approximately 360\*.

Number of instructional days per year will be at least 180 as per Florida Statute.

The school will follow the BCPS school calendar and will be adjusted according to State and BCPS guidelines upon development of the School's master schedule and/or may be modify by the IEP Committee for an individual student with disabilities if there is documentation to support the decision.

The following schedule will be implemented at the school based on state statute and the school district Student Progression Plan:

**Reading:** Grades K-5 daily schedule will consist of the required 90 minutes of consecutive and uninterrupted instructional time in reading. Students in need of immediate intensive intervention in reading will be scheduled for a minimum of an additional 30 minutes daily.

**Writing:** Grades K – 5, will receive 150 minutes of weekly writing instruction with a minimum of 30 minute instructional blocks.

**Mathematics:** Grades K-5 will receive mathematics instruction for the required 60 consecutive uninterrupted minutes daily.

**Science:** Grades K-5 will receive science instruction for the required 150 minutes weekly, including instruction utilizing the inquiry approach and scientific investigations and labs.

**Social Studies:** Grades K-5 will receive social science instruction for the required 150 minutes weekly.

**Art:** Grades K-5 will receive 30 minutes a week of art instruction provided by a teacher or integrated through core subject areas.

**Music:** Grades K-5 will receive 30 minutes a week of music instruction provided by a teacher or integrated through core subject areas.

**Physical Education/Recess:** All students in grades K-5 will receive the required 150 minutes, on a weekly basis, of physical education instruction, as well as an additional 30 minutes of recess.

**Foreign Language:** All students in grades K-5 will receive the required 30 minutes, on a weekly basis, of foreign language instruction.

**Interventions for RtI/MTSS:** In grades K-5, a minimum of 30 minutes of uninterrupted, daily immediate intensive intervention (iii) will be provided for Tier 2 students in addition to the 90minute reading block. Individual intervention beyond the initial block and iii will be provided for students which have been identified though the RtI/MTSS process as Tier 3. Based on RtI/MTSS, time requirements for these students, including students with disabilities, may be modified in art, music and social science. A minimum of 30 minutes of instruction each of art and music and 60 minutes for social science per week must be provided. For physical education, per statutory language, time requirements may be modified for students receiving intervention in Tiers 2 and 3 with a minimum of 60 minutes of instruction required per week.

\*The schedule may vary, for selected students, if further intervention is provided in reading based on a student's individual needs.

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

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

Excellence and performance drives teachers' pedagogical efforts, and their commitment to the students manifests itself in all aspects of the School. Teachers will deliver instruction to address the Florida Standards and place emphasis in certain subject matters by employing effective research-based strategies such as hands-on learning; inquiry-based research projects and project-based learning; science experimentation; technology rich environments and blended learning; integrated studies; CRISS (Creating Independence through Student-owned Strategies); Reciprocal Teaching; RAFT Writing; utilizing and responding to text-dependent questions; close readings; use of complex

texts; scaffolding of instruction; school-wide, cross-content citation and response strategies such as R.A.C.E; inquiry and student-centered learning; goals-oriented instruction and assessment; and fostering high expectations for all students, to name a few.

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

The applicant believes:

- ❖ Student learning is the primary focus of the School.
- ❖ Students learn in a variety of ways and should be given the opportunity to learn with a variety of different strategies and techniques.
- ❖ Administrators, teachers, staff, parents and community members agree to hold high goals and standards in order for students to achieve their maximum potential.
- ❖ Parents and teachers are partners in the educational process.
- ❖ The School community is committed to continuous improvement to enable students to be inspired to become life-long learners.

In order to achieve academic excellence, the School will develop an educational program that provides a well-round curriculum, differentiation and rigor while being aligned to the Florida Standards. The School will carefully research materials and curricula to ensure that they are standards based, provide adequate preparation for state assessments, have strong technological components, applications to strengthen the school-home connection and meet the individual needs of the student population while furthering the mission of the School.

Grade level classrooms will be heterogeneous consisting of students of varying levels; however, even distribution among classes will be highly taken into consideration when creating classes. Teachers will begin the school year with a thorough review of their students' previous year data as well as administer both a pre-test exam for Reading and Mathematics. This is all in an effort to begin gathering accurate data to better understand the students' areas of strengths and weakness as well as establish reading groups for differentiated instruction. Moreover, the teachers will make a determination in collaboration with the Reading Specialist as to which students will receive a county Progress Monitoring Plan in order to begin observing his/her individual performance.

Differentiated instruction will be used as a method to individualize learning in order to facilitate student content connection, deeper understanding of the material and eventually leading to skill mastery. Although differentiation can look different in every classroom based on teaching styles, the School will provide frequent Professional Learning Communities (PLC) in order to maintain staff development through the sharing best practices, learning new techniques and addressing new research and/or resources. The School will instill the value and effectiveness of differentiation when the teacher uses data to drive their instruction thus creating targeted skill reinforcement.

Additionally, the following instructional techniques will be incorporated throughout the curriculum in order to maximize learning and successful attainment of learning objectives:

**Personalized Instruction:** Students may be grouped by ability rather than grade level in mixed-age classrooms. In a mixed-age classroom: (1) Students are grouped according to needs, abilities and interests; (2) the goal-setting mind frame is taught and established from a young age; (3) the older students develop leadership and mentoring qualities plus improve responsibility as the younger students obtain intellectual stimulation through these interactions; (4) social experiences for the students are broadened with increased opportunities to lead, collaborate, develop stable peer relationships, and establish ownership of the learning environment; (5) if needed, older students are provided the opportunity to reinforce subjects that need to be improved (6) action-consequence relationships are built and understood by the students; and (7) learning is enhanced through the use of inquiry based centers, small group interactive sessions, and individual pacing instruction.

**Target Tutoring:** The School believes that each student has a distinctive learning style and therefore will use data-driven instruction and remediation strategies to target each student's academic needs through tailored instruction. The School will utilize data-analysis and a continuous assessment model of "Stop, Drop and Test" (SDT) to ensure students are being monitored consistently. The results of these assessments will be shared with parents/guardians and students in a timely manner, and teachers and students will use these results to set goals for the remainder of the school year. Additionally, the School will utilize data to enrich instruction and accelerate learning for students showing potential in specific areas. The School will provide opportunities and tutoring sessions to teach either one individual student or a small "targeted" number with the same instructional needs.

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

- ❖ **Direct Instruction (lecturing/modeling):** This technique will be used when teachers need to explain or demonstrate specific content and skills. Explicit, systematic instruction will be based on the NGSSS. This instruction is structured and based on mastery learning. Frequent curriculum-based assessments help group students by ability, leading to further differentiated strategies, which identify students who require additional intervention.
- ❖ **Scaffolding:** Teachers will utilize scaffolding via the gradual release model of instruction to facilitate filling gaps in student understanding. This is particularly crucial to the success of students with learning disabilities and students with limited English proficiency. Teachers will analyze the student's current level of understanding as compared to the knowledge



demands of the material, and will build a bridge or scaffold to help guide students towards mastery of the content. Infusing the “I do, we do, you do” methodology of the gradual release model will guide students toward understanding the topics being introduced in the scaffold.

- ❖ **Cooperative Learning:** Teachers will alternate guiding small group learning sessions with student-led cooperative grouping to increase communication and team-building skills. These teams of students will be grouped flexibly to allow for a variety of and multiple exposures to other students with similar and differing ability, interest, background, etc. Cooperative learning strategies such as jigsaws and Socratic circles, among others, will be utilized to enhance and differentiate learning experiences for students.
- ❖ **Inquiry-Based Learning:** Based on the Scientific Method, this student-centered strategy will require students to conduct investigations independent of the teacher, unless otherwise directed or guided through the process of discovery. Teachers will use this strategy in developing critical thinking and problem solving skills. There will also be emphasis on developing 21<sup>st</sup> century learners through technology-based instruction through methods such as the use of eBooks and webquests.
- ❖ **Information Processing Strategies:** Teaching students “how to” process information is a key factor in teaching students how to strategically organize, store, retrieve, and apply the information presented. Students will be given a “toolbox” of strategies from which they can pull and learn to apply effectively. Such strategies may include memorization, summarization, comprehension monitoring, use of K-W-L, activating prior knowledge, reciprocal teaching, use of graphic organizers, and/or webbing.
- ❖ **“Pull and Push” Method of Instruction:** The School will monitor students’ academic and emotional progress using a “pull and push” method. Students may be either “pulled” out of a class for additional remediation or acceleration, based on their needs. Conversely, a teacher or interventionist may “push” into an existing class to facilitate remediation or acceleration, to assist the teacher in differentiation and ensuring student needs are met. Instructors will either work one-on-one or in a group setting to assist students in reaching proficiency in a given subject area.

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

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

**Home Learning Policy:** The School expects that all teachers will grade, discuss, and comment on



homework regularly. Attention will be given to both quality and quantity of home learning projects. It is a school wide policy to assign homework Monday through Thursday. Homework is a review of and practice opportunity for what was previously taught within the class. The guideline below will outline the amount of time children should be spending on homework. This is just a guideline and times will vary according to the level and abilities of each child:

- Kindergarten - 2nd Grade up to 30 minutes per night
- 3rd Grade – 5th Grade up to 1 hour per night

On Fridays and holidays homework will be limited to long term projects/reports, make-up work, incomplete work, or study by the discretion of the teacher.

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

**Teachers Developing Curriculum:** Teachers will play an integral role in the delivery and development of core curriculum, maintaining - and exceeding - the highest expectations in alignment with the Florida Standards. Curriculum development will reflect how best to present a core body of knowledge. Teacher participation in curriculum development will also serve to increase their "buy-in" to the pedagogical process. Teachers at the School participate in Professional Learning Communities (PLCs) to help them unpack the standards and innovate their instruction using research-based instructional methods. PLCs are utilized to develop curricular resources for the Florida Standards to further school-wide initiatives and encourage instruction "beyond the book" of a given program.

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

**Parental Involvement** enhances learning when a school encourages parents to stimulate their children's intellectual development. Parental "investment" in a student's education is crucial to student success, as well as to the advancement of the School's mission and vision. Parental involvement agreements will encourage parents to contribute a minimum of 30 volunteer hours to ensure their active participation in their child's education. Parents will receive and sign a parent handbook that outlines the responsibilities they have for their child's learning and behavior at school and at home. Parental involvement will also be encouraged through active participation in the school's Parent Teacher Student Organization (PTSO), School Advisory Council (SAC) and other

such school-home connection opportunities. Home-based volunteer projects will be available to parents who are unable to volunteer on-site due to work or family constraints.

**Service Learning:** Teachers will engage students in service learning projects that start in the classroom and extend beyond it, encouraging responsible, caring participation in the local environment and in the wider world. Service-learning activities will be embedded in core academic courses (English Language Arts, math, science and social studies) to achieve the existing course objectives and to help students meet grade level standards.

### **C. Describe the research base for the educational program.**

A tremendous amount of research has been conducted on effective practices for improving student learning. These practices will provide the basis for pedagogy at the School. Selected generic practices will be used in all of the academic courses, which are expressed below. It will be expected that in addition to these practices, teachers will also implement research-based strategies as applicable through their own subjects.

The School's educational program is specifically designed to:

- ❖ Improve the academic performance of all students, including at-risk students, by tailoring curriculum to individual learning styles, by focusing on strengths, by setting high academic expectations, by viewing differences as assets rather than liabilities and by incorporating best educational practices into the classroom and the curriculum.
- ❖ Increase positive self-image by providing students with successful learning experiences.
- ❖ Extinguish inappropriate behavior patterns by utilizing a behavior management program that focuses on positive behaviors through a highly structured reward system.

There are two elements that will be pursued by the instructional staff of the School: Academic Excellence and Character Development. To achieve this, the educational model will draw on Dr. TheodoreSizer's Coalition of Essential Schools and its nine principles. A sampling of ways in which Dr. TheodoreSizer's nine principles will be implemented include:

#### **Principle 1: Less is more**

##### ***(Guided research, integrating curriculum, "uncovering" curriculum)***

Integrating Curriculum: Separate subject areas will be blended into broad themes and concepts rather than isolated subjects and skills. Science and Math will be coupled as well as Language Arts and Social Studies, for example, as a means for reinforcing and integrating subject matters.

#### **Principle 2: Intellectual Focus**

##### ***(Creative thinking, engaging minds, essential questions, alternative teaching strategies)***

Alternative Teaching Strategies: It will be a requirement of teachers at the School to "break the mold" and come up with alternative teaching strategies, such as differentiated instruction, to target student's learning needs and ensure academic success.

### **Principle 3: Universal goals**

#### ***(Themes, learning and mind styles, interdisciplinary approaches, inclusion)***

Learning and Mind Styles: It is the very foundation of the School that each student must be viewed as an individual with unique learning and “mind styles”. Teachers will be required to take a constructivist approach, i.e., they will look at how each student learns and thinks and then use this information to expand on the student’s learning. Teachers at the School will not be providers of information, but providers of opportunities for students to gather their own information.

### **Principle 4: Creative Administration Plan**

#### ***(Changing status of present structures and schedules, differentiated roles for all, staff development)***

School staff will be recognized for his or her individual teaching style. Teachers will be required to recognize and teach to the strengths of each student, as such, students will experience success in the learning process. Success breeds positive self-esteem. The master schedule will concomitantly balance the needs of the students to complete a program to meet and/or exceed expectations. Teachers’ professional development needs will be addressed individually.

### **Principle 5: Personalization**

#### ***(Learning styles, student self-esteem, common planning time, teams and houses, cross-grading)***

Each student’s learning environment will be personalized to meet his/her potential and to address his/her learning style. Small learning communities will exist, wherein each group may pursue a specific class or unit of study differently. In that manner, each student will be an integral part of a learning team.

### **Principle 6: Staff**

#### ***(Participatory management, teachers developing curriculum, changing teacher practices)***

Teachers Developing Curriculum: Teachers will play an integral role in the development of core curriculum instruction methods, maintaining - and exceeding - the highest standards to ensure student mastery of the Common Core State Standards. Curriculum development will reflect what and how best to present a core body of knowledge, and through teacher participation in curriculum development, it is anticipated that their buy-in to the pedagogical process will be dramatically increased.

### **Principle 7: Student as Worker**

#### ***(Cooperative learning, student involvement, commitment, and responsibility empowered student/teacher as coach)***

- Student Involvement: Students will be highly engaged and involved in their learning through a strong commitment to the principle of teacher as facilitator.
- Commitment and Responsibility: By signing the School’s Code of Conduct, students acknowledge that they are making a commitment to and remain responsible for their role as an active participant in the learning process.

### **Principle 8: Demonstration of Mastery**

#### ***(Performance assessments, planning backwards, exhibitions and portfolios)***

Performance Assessments: An integral part of the methods used to identify educational strengths of students at the School will involve performance assessments. Namely, facilitator observation, peer and self-evaluations, projects, presentations, and portfolios will be used as performance assessments, in addition to state and district required assessments.

### **Principle 9: Attitude**

#### ***(Parent involvement, collegueship, comradeship, trust and decency, and cooperation)***

Parent Involvement: It is expected that parents will play an integral role in the School, not only via completion of their parental contribution hours, but also in their involvement in the PTSA and other such school commitments. The educational philosophy of the school centers on building a love of learning through strong family relationships and a supportive educational environment. Learning best occurs for the student population served by the constant interaction between the home and school. Students understand that their parents/guardians are well informed of the educational process and are full participants in their education.

Learning is enhanced when schools encourage parents to stimulate their children's intellectual development (Graue, Weinstein, Walberg, Iverson). The School enables parents to be active participants in the educational process through volunteerism opportunities. Also, parents will be informed of school events and school wide learning topics thorough the school website, parent newsletter and home school telephone messaging system as a means to encourage continued dialogue and to express interest in their son's or daughter's personal and academic progress.

#### ***Other research based strategies:***

Other research based strategies the School will utilize include: hands on learning; inquiry-based research projects, science experimentation, hands-on technology that is integrated & problem driven, CRISS (Creating Independence through Student-owned Strategies, Reciprocal Teaching, Small learning communities, etc. The school will utilize research based and state adopted textbooks for all core curriculum subjects.

Some of the research-based programs that will be utilized include:

❖ **K-12 Comprehensive Research-Based Reading Plan (CRRP)** implemented by Broward County Public Schools

#### ❖ **Carnegie Cognitive Tutor**

Carnegie Learning's Cognitive Tutors are the most extensively researched mathematics curricula on the market today. They are based on over 20 years of research on how students think, learn, and apply new knowledge in mathematics. The system is built on cognitive models that assess students' mathematical knowledge on a step-by-step basis and presents activities tailored to their individual skill levels.

Research shows that students using Carnegie Learning's Algebra I program:

1. Demonstrate an 85% better performance on assessments of complex mathematical problem solving and thinking
2. Perform 30% better on questions from the TIMSS assessment
3. Experience equivalent results for both minority and non-minority students

A recent random-assignment study showed significant advantages for students using the Cognitive Tutor over a traditional curriculum, even when both groups of students had the same teacher instructor.

Additional research-based programs that may be utilized include:

#### ❖ Reading Plus

Reading Plus is a web-based program serving students in grades 3 and up that transforms, how, what, and why students read while broadening interests and building knowledge. The program monitors student performance, generating a list of recommended actions that saves valuable time for teachers and ensures students get the attention they need. Reading Plus allows teachers to track weekly assignments, evaluate rate of improvement, and assess progress outcomes at various benchmark intervals. Teachers are alerted to students who are struggling, have earned performance awards, or have submitted writing assignments.

#### ❖ Study Island

Study Island helps students in kindergarten through 12th grade master state-specific, grade-level academic standards in a fun and engaging manner. Study Island provides standards-based instructional, practice, assessment, and productivity tools that improve the performance of educators and students via our web-based platforms. Study Island combines rigorous content that is highly customized to specific state standards in math, reading, writing, science, and social studies with interactive features and games that engage students and reinforce and reward learning achievement. Study Island's programs enable educators to track student performance in real-time to address individual learning gaps, while allowing administrators to monitor student progress and measure teacher effectiveness.

#### **D. Explain how the educational program aligns with the school's mission.**

The mission of Somerset Parks Academy Charter School is to provide a safe, inspiring technology-infused environment, motivating students to excel in academic and personal achievement. This mission will lay the foundation and promote the development of responsible, passionate, lifelong learners in a safe and inviting environment. Constantly innovative administrators and educators, combined with involved parents, will be charged with the duty to aid the ascent of the students and reach their maximum potential.

The educational philosophy is built on a set of core beliefs and values, discussed in the previous section, for the direct purpose of achieving the School's mission. For example, we believe that a common goal of high academic standards and behavioral expectations will foster responsible and self-directed learners; Accordingly, the School's programs emphasize high academic and behavioral

expectations for all students using “pull and push” philosophy - students in need of remediation will be identified and “pulled” and students at grade level will be “pushed” to take challenging curriculum to maximize their potential. Students will understand and appreciate their learning styles, accommodate, plan, and monitor their learning, inspiring a desire and ability for lifelong learning. The aforementioned concepts are embodied in the school program and serve as a vehicle to increase learning opportunities with special effort made to help low performing students have success and increased learning gains.

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

- ❖ School-based and community beautification projects
- ❖ Volunteerism and Community Service requirements
- ❖ Involvements in school organizations - Student council, student government, environmental club, Best Buddies, PTSA

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

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

The School is committed to serving the needs of all its students, regarding of level, learning style(s), and/or special needs. Teachers will utilize differentiated instruction, as well as other modes of instruction including, but not limited to peer tutoring, individual instruction, and group work. Additionally, the School will ensure that students with special needs, such as ESE and ELL students, are effectively served in accordance with the policies and procedures of Broward County Public Schools.

All students will be monitored to ensure they are making adequate progress toward Florida State Standards/NGSSS. In this way, students who are struggling and/or below-level students will be identified so that any problems can be effectively remediated. Teachers and other support staff will use data from all available assessments, including but not limited to state and district required

assessments, to develop instruction that meets the needs of all students so that each child can realize his or her potential.

As deemed necessary according to student need, the School will employ Reading and/or Math coaches and ELL and ESE personnel to service students. Classroom teachers will utilize research-based, state adopted texts, enhanced by supplementary materials and programs, to ensure students make progress toward the Common Core State Standards/NGSSS as required.

**If the school intends to replicate an existing school design:**

**F. Provide evidence that the existing design has been effective and successful in raising student achievement.**

The school will be a replication of the existing Somerset Academy, Inc. high-performing system and therefore likely to result in improved educational performance for the target population. The existing programs have proven to be highly effective in improving the educational performance while serving high minority student populations.

Pursuant to s. 1002.331(3)(a), the School will be a replication of the existing Somerset Academy school educational programs in existence in Miami-Dade, Broward, Palm Beach, St. Lucie, Monroe and Duval Counties as well as in San Antonio, Texas. Somerset Academy was founded in 1997, and has since established high-quality educational programs that have and continue to achieve academic success. The educational program is likely to result in improved educational performance for the target population, since the existing programs have proven to be highly effective in improving the educational performance while serving high minority student populations. Founded in 1997, Somerset Academy was one of the first charter schools to open in Broward County, and has achieved among the State's highest Mathematics scores in the Stanford Achievement Test and in the FCAT. Somerset Academy was also one of the first charter schools in Florida to be accredited by the Southern Association of Colleges and Schools (SACS - CASI). Since then, every Somerset program has each sought and obtained accreditation, informing stakeholders that every Somerset school is a quality school, committed to continuous improvement.

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

*"Somerset Academy, Inc. has a laser-like focus and drive towards excellence and long-range success...[the organization] encourages stakeholder involvement, uses data analysis to improve classroom instruction and student learning, and provides leadership at the district and school level to encourage innovation in all areas. The system also aligns curriculum with*

*the Florida Sunshine State Standards. The board delegates administrative functions to the principals and collectively they have studied and revised the vision and purpose of the school system..."*

- Dr. Olivine Roberts, Chair, Quality Assurance Review Team  
SACS-CASI - Report of the QAR Team for Somerset  
Academy, Inc.  
April 26-29, 2009

Somerset Academy, Inc. was awarded re-accreditation from Advanc-ED during the 2013-2014 school year. Based on the organization's accreditation, the proposed school under the operation of Somerset Academy Inc. will open as an Advanc-ED accredited school from its inception and will be held to the same standards of accountability of the existing programs. Thus, by replicating the successful educational design of the existing schools – with a full-range of services targeted to students of all performance levels - the proposed School will prove highly effective in raising student achievement.

Somerset's continuous compliance with legal, organizational, and financial requirements coupled with increasing academic performance annually for all schools, has yielded approved and/or renewed charter school contracts over the past ten years. Today, Somerset has successfully replicated nearly 50 other high quality programs across the Southern United States, which have and continue to increase student performance in grades K-12.

Over the years the founding staff has transformed into an accomplished team wherein founding teachers have become Somerset principals and administrators in its successfully replicated schools. Cultivating this leadership atmosphere, Somerset Academy, Inc. has a retention rate of over 90% inclusive of founding board members, administrators, and teachers.

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

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



The term “academic success” best describes Somerset’s learning community both collectively as an organization as well as at each individual school. As of the 2007-2008 academic school year, all Somerset elementary and middle schools achieved an “A “ grade collectively while the high school achieved a high “B” on the State of Florida’s A+ Accountability Reports. Most recently 54% of Somerset schools maintain an “A” rating with the state of Florida.

Each of the Somerset schools has been locally recognized and has won multiple awards for high academic achievement annually while serving a high percentage of minority students (85% average). The Mathematics program at Somerset Academy was derived, modeled and implemented from the original multi-age learning environment with an inventive Mathematics component titled “Project MIND” (Math Is Not Difficult) developed by one of Somerset Academy’s Board Members. In 1999, only the second year of the Mathematics program, Somerset Neighborhood achieved the highest Stanford Achievement Test (SAT) Mathematics scores in the State of Florida. Student percentile rankings increased by 32% from below the county average to well above the average. In 2013-2014, 67% of Somerset Academy, Inc. students scored an achievement level 3 or above on the FCAT.

In only the second year of Somerset middle school program in an underserved area of Homestead, FL, Somerset Academy Middle School was recognized as the #1 middle school in the state making academic progress. The school was also the winner of the Florida Literacy Challenge, having the highest learning gains in Reading in the State of Florida in 2006. The school’s program increased its percentage of students reading at or above grade level to 79 percent up from 28 percent during the opening year. As a pioneer of many of its programs, Somerset Academy possesses the experience, the experts, and the proven track record of success that make its schools worthy of replication.

Somerset Academy’s successful operation of high performing schools with consistent results in student achievement is validated by student academic performance as evidenced by the Florida Department of Education Accountability Reports.

Somerset’s Academy’s continuous compliance with legal, organizational, and financial requirements coupled with increasing academic performance annually for all schools, has yielded approved and/or renewed charter school contracts over the past ten years. Currently in Florida, there are close 50 Somerset Academy programs in Dade, Broward, St. Lucie, Palm Beach and Duval counties offering complete Pre-K through high school systems across 21 campuses serving over 15,000.

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

| Somerset Academy, Inc. School's Report Card (Inception - 2013-2014 SY) |           |         |       |                   |                                   |                                |                                   |                                   |                |               |
|------------------------------------------------------------------------|-----------|---------|-------|-------------------|-----------------------------------|--------------------------------|-----------------------------------|-----------------------------------|----------------|---------------|
| School                                                                 | School ID | Year    | Grade | Sum Points Earned | Meeting High Standards in Reading | Meeting High Standards in Math | Meeting High Standards in Writing | Meeting High Standards in Science | Free/Red Lunch | Minority Rate |
| Somerset Academy Charter                                               | 0520      | 2013-14 | B     | 572               | 85                                | 82                             | 55                                | 69                                | 59             | 97            |
|                                                                        |           | 2012-13 | A     | 569               | 80                                | 83                             | 61                                | 71                                | 49             | 95            |
|                                                                        |           | 2011-12 | A     | 608               | 80                                | 83                             | 96                                | 61                                | 57             | 94            |
|                                                                        |           | 2010-11 | A     | 603               | 91                                | 90                             | 75                                | 66                                | 54             | 91            |
|                                                                        |           | 2009-10 | A     | 625               | 85                                | 88                             | 91                                | 61                                | 45             | 91            |
|                                                                        |           | 2008-09 | B     | 583               | 86                                | 87                             | 87                                | 55                                | 43             | 90            |
|                                                                        |           | 2007-08 | A     | 604               | 82                                | 86                             | 86                                | 51                                | 43             | 86            |
|                                                                        |           | 2006-07 | A     | 589               | 81                                | 79                             | 88                                | 52                                | 44             | 89            |
|                                                                        |           | 2005-06 | A     | 461               | 84                                | 75                             | 88                                | N/A                               | 43             | 89            |
| Somerset Academy Charter Elementary School (South Homestead)           | 0339      | 2013-14 | B     | 502               | 60                                | 62                             | 21                                | 57                                | 76             | 88            |
|                                                                        |           | 2012-13 | B     | 516               | 58                                | 53                             | 77                                | 73                                | 73             | 85            |
|                                                                        |           | 2011-12 | B     | 502               | 66                                | 61                             | 77                                | 56                                | 73             | 85            |
|                                                                        |           | 2010-11 | A     | 645               | 74                                | 82                             | 87                                | 50                                | 67             | 85            |
|                                                                        |           | 2009-10 | D     | 422               | 61                                | 54                             | 83                                | 34                                | 61             | 82            |
| Somerset Academy Elementary School South Miami Campus                  | 2007      | 2013-14 | A     | 758               | 91                                | 86                             | 65                                | 80                                | 16             | 89            |
|                                                                        |           | 2012-13 | A     | 616               | 84                                | 86                             | 67                                | 73                                | 15             | 87            |
|                                                                        |           | 2011-12 | A     | 668               | 89                                | 89                             | 92                                | 74                                | 14             | 85            |
|                                                                        |           | 2010-11 | A     | 693               | 91                                | 93                             | 88                                | 80                                | 14             | 70            |
|                                                                        |           | 2009-10 | N/A   | 594               | 91                                | 91                             | 93                                | 79                                | 12             | 81            |
| Somerset Arts Academy                                                  | 2012      | 2013-14 | C     | 486               | 71                                | 71                             | 62                                | 40                                | 62             | 70            |
|                                                                        |           | 2012-13 | C     | 492               | 66                                | 70                             | 48                                | 47                                | 30             | 68            |
|                                                                        |           | 2011-12 | B     | 509               | 67                                | 56                             | 89                                | 57                                | 52             | 65            |
|                                                                        |           | 2010-11 | A     | 558               | 78                                | 79                             | 81                                | 50                                | 33             | 65            |
|                                                                        |           | 2009-10 | N/A   | 495               | 82                                | 84                             | 89                                | 50                                | 48             | 67            |
| Somerset Academy-Elementary, Eagle Campus                              | 1251      | 2013-14 | C     | 435               | 53                                | 42                             | 52                                | 12                                | 52             | 96            |
|                                                                        |           | 2012-13 | B     | 503               | 65                                | 67                             | 55                                | 44                                | 41             | 94            |
|                                                                        |           | 2011-12 | A     | 580               | 69                                | 52                             | 93                                | 62                                | 32             | 94            |
|                                                                        |           | 2010-11 | N/A   | 480               | 69                                | 75                             | 67                                | 41                                | 30             | 96            |
| Somerset Academy                                                       | 5141      | 2013-14 | A     | 583               | 82                                | 79                             | 68                                | 69                                | 31             | 90            |
|                                                                        |           | 2012-13 | A     | 556               | 75                                | 77                             | 84                                | 60                                | 36             | 90            |
|                                                                        |           | 2011-12 | A     | 584               | 77                                | 72                             | 92                                | 56                                | 35             | 90            |
|                                                                        |           | 2010-11 | A     | 566               | 83                                | 86                             | 86                                | 61                                | 31             | 91            |
|                                                                        |           | 2009-10 | B     | 536               | 86                                | 84                             | 97                                | 53                                | 37             | 91            |
|                                                                        |           | 2008-09 | A     | 601               | 85                                | 86                             | 96                                | 53                                | 19             | 87            |
|                                                                        |           | 2007-08 | A     | 568               | 81                                | 80                             | 91                                | 51                                | 15             | 86            |
|                                                                        |           | 2006-07 | A     | 580               | 82                                | 78                             | 93                                | 56                                | 14             | 82            |
|                                                                        |           | 2005-06 | A     | 431               | 82                                | 76                             | 76                                | N/A                               | 13             | 80            |
|                                                                        |           | 2004-05 | A     | 451               | 81                                | 76                             | 85                                | N/A                               | 15             | 76            |
|                                                                        |           | 2003-04 | A     | 418               | 75                                | 71                             | 90                                | N/A                               | 13             | 72            |
|                                                                        |           | 2002-03 | B     | 403               | 73                                | 68                             | 81                                | N/A                               | 9              | 68            |
| Somerset Academy Davie Charter                                         | 5211      | 2013-14 | A     | 537               | 78                                | 78                             | 50                                | 53                                | 45             | 57            |
|                                                                        |           | 2012-13 | A     | 561               | 86                                | 83                             | 50                                | 76                                | 36             | 60            |
|                                                                        |           | 2011-12 | A     | 588               | 80                                | 80                             | 83                                | 63                                | 40             | 61            |
|                                                                        |           | 2010-11 | A     | 661               | 94                                | 92                             | 90                                | 75                                | 42             | 59            |
|                                                                        |           | 2009-10 | A     | 625               | 92                                | 92                             | 82                                | 63                                | 45             | 60            |
|                                                                        |           | 2008-09 | A     | 656               | 90                                | 90                             | 96                                | 56                                | 99             | 62            |
| Somerset Academy East Preparatory                                      | 5391      | 2013-14 | A     | 604               | 61                                | 73                             | 33                                | 88                                | 78             | 96            |
|                                                                        |           | 2012-13 | A     | 572               | 64                                | 61                             | 69                                | 71                                | 80             | 96            |
|                                                                        |           | 2011-12 | A     | 533               | 56                                | 54                             | 72                                | 71                                | 82             | 97            |
|                                                                        |           | 2010-11 | A     | 552               | 63                                | 72                             | 81                                | 67                                | 73             | 96            |
|                                                                        |           | 2009-10 | C     | 487               | 68                                | 59                             | 84                                | 29                                | 69             | 95            |
| Somerset Academy Elementary (Miramar Campus)                           | 5405      | 2013-14 | A     | 631               | 86                                | 84                             | 86                                | 71                                | 57             | 93            |
|                                                                        |           | 2012-13 | A     | 605               | 77                                | 82                             | 70                                | 61                                | 63             | 93            |
|                                                                        |           | 2011-12 | A     | 642               | 73                                | 80                             | 97                                | 64                                | 62             | 93            |
|                                                                        |           | 2010-11 | A     | 593               | 86                                | 85                             | 96                                | 53                                | 55             | 91            |
|                                                                        |           | 2009-10 | A     | 579               | 81                                | 81                             | 94                                | 59                                | 61             | 93            |
|                                                                        |           | 2008-09 | A     | 565               | 81                                | 78                             | 84                                | 43                                | 57             | 94            |
|                                                                        |           | 2007-08 | A     | 582               | 75                                | 75                             | 88                                | 55                                | 43             | 93            |
|                                                                        |           | 2006-07 | B     | 502               | 77                                | 77                             | 100                               | 48                                | 39             | 91            |
| Somerset Pines Academy                                                 | 5030      | 2013-14 | B     | 572               | 57                                | 46                             | 58                                | 42                                | 65             | 61            |
|                                                                        |           | 2012-13 | C     | 438               | 55                                | 46                             | 56                                | 38                                | 59             | 58            |
|                                                                        |           | 2011-12 | C     | 488               | 63                                | 52                             | 59                                | 51                                | 64             | 61            |
|                                                                        |           | 2010-11 | C     | 463               | 73                                | 75                             | 68                                | 51                                | 63             | 62            |

|                                                                 |      |         |     |     |    |    |     |     |    |
|-----------------------------------------------------------------|------|---------|-----|-----|----|----|-----|-----|----|
| Somerset Preparatory Academy Charter School at North Lauderdale | 5003 | 2013-14 | D   | 410 | 39 | 29 | 33  | 27  | 97 |
|                                                                 |      | 2012-13 | C   | 533 | 48 | 42 | 50  | 45  | 91 |
|                                                                 |      | 2011-12 | C   | 542 | 48 | 37 | 75  | 34  | 85 |
|                                                                 |      | 2010-11 | D   | 417 | 51 | 52 | 69  | 19  | 81 |
| Somerset Village Academy                                        | 5004 | 2013-14 | C   | 458 | 50 | 49 | 29  | 46  | 94 |
|                                                                 |      | 2012-13 | C   | 447 | 40 | 45 | 50  | 29  | 89 |
|                                                                 |      | 2011-12 | C   | 467 | 35 | 37 | 83  | 27  | 83 |
|                                                                 |      | 2010-11 | C   | 453 | 66 | 61 | 67  | 24  | 81 |
| Somerset Academy (Silver Palms)                                 | 0332 | 2013-14 | A   | 628 | 67 | 74 | 50  | 43  | 81 |
|                                                                 |      | 2012-13 | A   | 623 | 67 | 67 | 61  | 43  | 84 |
|                                                                 |      | 2011-12 | A   | 619 | 62 | 55 | 89  | 42  | 82 |
| Somerset Preparatory Academy at Silver Palms                    | 4012 | 2013-14 | A   | 618 | 82 | 83 | 64  | 54  | 82 |
|                                                                 |      | 2012-13 | B   | 495 | 63 | 57 | 51  | 32  | 85 |
|                                                                 |      | 2011-12 | A   | 541 | 60 | 53 | 74  | 50  | 82 |
| Somerset Grace Academy                                          | 5008 | 2013-14 | A   | 744 | 89 | 91 | 94  | 92  | 10 |
|                                                                 |      | 2012-13 | N/A | 618 | 84 | 78 | 77  | 53  | 4  |
| Somerset Academy (Pompano)                                      | 5387 | 2013-14 | F   | 358 | 36 | 22 | 61  | 51  | 81 |
| Somerset Neighborhood School                                    | 5021 | 2013-14 | A   | 531 | 71 | 70 | 46  | 56  | 75 |
|                                                                 |      | 2012-13 | B   | 495 | 67 | 59 | 40  | 56  | 66 |
|                                                                 |      | 2011-12 | A   | 525 | 62 | 58 | 87  | 39  | 60 |
|                                                                 |      | 2010-11 |     |     |    |    |     |     |    |
|                                                                 |      | 2009-10 | N/A | 452 | 69 | 75 | 81  | 35  | 66 |
| Somerset Academy Pompano                                        | 5388 | 2013-14 | F   | 383 | 33 | 34 | 52  | 17  | 79 |
|                                                                 |      | 2012-13 | N/A | 193 | 29 | 24 | 36  | 30  | 78 |
| Somerset Preparatory Academy                                    | 5501 | 2013-14 | F   | 216 | 25 | 15 | 5   | 22  | 55 |
| Somerset Academy Boca East                                      | 3413 | 2013-14 | B   | 498 | 75 | 64 | 58  | 56  | 24 |
| Somerset Academy Bay                                            | 5062 | 2013-14 | A   | 593 | 84 | 76 | 84  | 79  | 12 |
| Somerset Academy Middle (Miramar Campus)                        | 5406 | 2013-14 | A   | 672 | 78 | 83 | 60  | 50  | 65 |
|                                                                 |      | 2012-13 | A   | 623 | 76 | 79 | 62  | 42  | 68 |
|                                                                 |      | 2011-12 | A   | 696 | 68 | 84 | 90  | 51  | 67 |
|                                                                 |      | 2010-11 | A   | 642 | 82 | 88 | 97  | 62  | 55 |
|                                                                 |      | 2009-10 | A   | 605 | 77 | 76 | 96  | 46  | 59 |
|                                                                 |      | 2008-09 | A   | 610 | 73 | 78 | 100 | 60  | 54 |
|                                                                 |      | 2007-08 | A   | 534 | 72 | 64 | 95  | 43  | 46 |
| Somerset Academy Middle School                                  | 5151 | 2013-14 | A   | 691 | 78 | 79 | 77  | 66  | 33 |
|                                                                 |      | 2012-13 | A   | 674 | 79 | 78 | 74  | 68  | 32 |
|                                                                 |      | 2011-12 | A   | 688 | 76 | 76 | 95  | 70  | 38 |
|                                                                 |      | 2010-11 | A   | 604 | 83 | 81 | 93  | 61  | 27 |
|                                                                 |      | 2009-10 | A   | 606 | 80 | 80 | 93  | 67  | 28 |
|                                                                 |      | 2008-09 | A   | 580 | 76 | 80 | 96  | 52  | 21 |
|                                                                 |      | 2007-08 | A   | 563 | 74 | 74 | 97  | 52  | 16 |
|                                                                 |      | 2006-07 | A   | 539 | 72 | 68 | 94  | 43  | 20 |
|                                                                 |      | 2005-06 | A   | 464 | 70 | 71 | 91  | N/A | 17 |
|                                                                 |      | 2004-05 | B   | 409 | 60 | 65 | 93  | N/A | 18 |
|                                                                 |      | 2003-04 | A   | 413 | 61 | 61 | 87  | N/A | 9  |
|                                                                 |      | 2002-03 | A   | 442 | 66 | 68 | 95  | N/A | 15 |
| Somerset Academy Village Charter Middle School                  | 5002 | 2013-14 | C   | 551 | 44 | 45 | 38  | 46  | 91 |
|                                                                 |      | 2012-13 | D   | 399 | 43 | 39 | 30  | 37  | 87 |
|                                                                 |      | 2011-12 | C   | 439 | 42 | 34 | 75  | 27  | 84 |
|                                                                 |      | 2010-11 | C   | 438 | 50 | 39 | 90  | 49  | 87 |

|                                                          |      |         |     |     |    |     |     |     |    |     |
|----------------------------------------------------------|------|---------|-----|-----|----|-----|-----|-----|----|-----|
| Somerset Preparatory Charter Middle School               | 5441 | 2013-14 | A   | 608 | 61 | 52  | 66  | 39  | 73 | 98  |
|                                                          |      | 2012-13 | C   | 497 | 54 | 45  | 52  | 35  | 69 | 98  |
|                                                          |      | 2011-12 | B   | 548 | 50 | 49  | 88  | 33  | 67 | 96  |
|                                                          |      | 2010-11 | A   | 544 | 74 | 52  | 90  | 49  | 79 | 97  |
| Somerset Academy Charter Middle School                   | 6004 | 2013-14 | A   | 724 | 79 | 88  | 64  | 78  | 67 | 91  |
|                                                          |      | 2012-13 | A   | 670 | 75 | 80  | 48  | 54  | 50 | 92  |
|                                                          |      | 2011-12 | A   | 702 | 77 | 73  | 95  | 77  | 54 | 89  |
|                                                          |      | 2010-11 | A   | 575 | 81 | 77  | 79  | 76  | 46 | 87  |
|                                                          |      | 2009-10 | A   | 618 | 83 | 84  | 85  | 45  | 37 | 87  |
|                                                          |      | 2008-09 | A   | 587 | 74 | 75  | 94  | 37  | 46 | 90  |
|                                                          |      | 2007-08 | A   | 557 | 68 | 71  | 95  | 38  | 46 | 90  |
|                                                          |      | 2006-07 | B   | 504 | 77 | 62  | 90  | 34  | 36 | 89  |
|                                                          |      | 2005-06 | A   | 485 | 81 | 74  | 88  | N/A | 32 | 89  |
|                                                          |      | 2004-05 | D   | 282 | 29 | 18  | 81  | N/A | 50 | 92  |
|                                                          |      | 1998-99 |     |     |    |     |     |     |    |     |
|                                                          |      |         |     |     |    |     |     |     |    |     |
| Somerset Academy Charter Middle School (South Homestead) | 6013 | 2013-14 | A   | 619 | 60 | 59  | 60  | 46  | 78 | 84  |
|                                                          |      | 2012-13 | A   | 604 | 66 | 56  | 40  | 60  | 75 | 82  |
|                                                          |      | 2011-12 | B   | 560 | 58 | 47  | 85  | 39  | 72 | 76  |
|                                                          |      | 2010-11 | A   | 591 | 70 | 72  | 89  | 63  | 65 | 77  |
|                                                          |      | 2009-10 | A   | 552 | 67 | 66  | 94  | 15  | 53 | 77  |
|                                                          |      | 2008-09 | N/A | 693 | 90 | 90  | 94  | 39  | 86 | 93  |
| Somerset Academy Middle Country Palms                    | 6043 | 2013-14 | A   | 669 | 88 | 77  | 54  | 50  | 64 | 75  |
|                                                          |      | 2012-13 | C   | 491 | 68 | 53  | 51  | 47  | 24 | 63  |
|                                                          |      | 2011-12 | N/A | 418 | 39 | 33  | 77  | 45  | 61 | 61  |
|                                                          |      | 2010-11 |     |     |    |     |     |     |    |     |
|                                                          |      | 2009-10 | N/A | 397 | 55 | 0   | 89  | 39  | 27 | 100 |
|                                                          |      | 2008-09 | N/A | 451 | 60 | 40  | 94  | 39  | 64 | 100 |
| Somerset Academy Charter Middle School South Miami       | 6053 | 2013-14 | A   | 758 | 91 | 86  | 65  | 80  | 8  | 79  |
|                                                          |      | 2012-13 | A   | 697 | 86 | 76  | 80  | 66  | 18 | 83  |
|                                                          |      | 2011-12 | A   | 656 | 85 | 70  | 100 | 63  | 15 | 82  |
|                                                          |      | 2010-11 | A   | 645 | 93 | 89  | 84  | 47  | 8  | 82  |
|                                                          |      | 2009-10 | N/A | 647 | 91 | 100 | 89  | 39  | 8  | 67  |
| Somerset Academy-Middle, Eagle Campus                    | 1261 | 2013-14 | B   | 560 | 61 | 52  | 73  | 23  | 49 | 93  |
|                                                          |      | 2012-13 | A   | 615 | 59 | 57  | 63  | 17  | 36 | 94  |
|                                                          |      | 2011-12 | B   | 579 | 51 | 50  | 96  | 17  | 35 | 94  |
|                                                          |      | 2010-11 | A   | 558 | 66 | 63  | 86  | 36  | 31 | 92  |
| Somerset Preparatory Academy at Silver Palms             | 4012 | 2013-14 | B   | 579 | 72 | 70  | 66  | 58  | 23 | 36  |
|                                                          |      | 2012-13 | B   | 445 | 63 | 57  | 51  | 32  | 85 | 96  |
|                                                          |      | 2011-12 | A   | 541 | 60 | 53  | 74  | 50  | 82 | 96  |
| Somerset Academy Boca Middle School                      | 4041 | 2013-14 | A   | 577 | 77 | 73  | 66  | 53  | 22 | 61  |
| Somerset Academy Hollywood Middle School                 | 5419 | 2013-14 | A   | 535 | 62 | 54  | 65  | 50  | 80 | 80  |
| Somerset Academy Pomapano Middle                         | 5413 | 2013-14 | B   | 508 | 55 | 50  | 65  | 50  | 96 | 91  |
| Somerset Academy Bay Middle School                       | 6128 | 2013-14 | A   | 593 | 84 | 76  | 84  | 79  | 16 | 84  |
| Somerset Academy Charter High                            | 5221 | 2013-14 | A   | 644 | 73 | 84  | 80  | 88  | 40 | 87  |
|                                                          |      | 2012-13 | A   | 605 | 68 | 79  | 79  | 76  | 36 | 85  |
|                                                          |      | 2011-12 | A   | 591 | 63 | 77  | 94  | N/A | 43 | 83  |
|                                                          |      | 2010-11 | A   | 532 | 59 | 86  | 80  | 41  | 36 | 81  |
|                                                          |      | 2009-10 | A   | 556 | 57 | 85  | 91  | 34  | 36 | 85  |
|                                                          |      | 2008-09 | A   | 529 | 48 | 85  | 83  | 22  | 26 | 82  |
|                                                          |      | 2007-08 | B   | 495 | 50 | 76  | 84  | 17  | 20 | 83  |
|                                                          |      | 2006-07 | C   | 444 | 35 | 66  | 93  | 33  | 21 | 83  |
|                                                          |      | 2005-06 | B   | 408 | 47 | 74  | 94  | N/A | 19 | 83  |
|                                                          |      | 2004-05 | C   | 351 | 35 | 69  | 82  | N/A | 17 | 85  |
| Somerset Arts Conservatory                               | 5396 | 2013-14 | A   | 593 | 66 | 81  | 63  | 82  | 78 | 93  |
|                                                          |      | 2012-13 | A   | 580 | 67 | 71  | 71  | 80  | 80 | 94  |
|                                                          |      | 2011-12 | A   | 591 | 46 | 73  | 88  | N/A | 82 | 95  |
|                                                          |      | 2010-11 | A   | 541 | 37 | 93  | 75  | 43  | 81 | 94  |
|                                                          |      | 2009-10 | A   | 538 | 51 | 83  | 87  | 46  | 72 | 94  |
|                                                          |      | 2008-09 | B   | 508 | 49 | 77  | 85  | 33  | 76 | 94  |
| Somerset Academy Charter High School                     | 7042 | 2007-08 |     |     |    |     |     |     |    |     |
|                                                          |      | 2006-07 | A   | 594 | 64 | 93  | 83  | 30  | 29 | 90  |

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

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

Somerset Academy, Inc. is a Florida not-for-profit educational institution with a proven eighteen year track record of successful development and operation of 48 high-performing charter schools serving over 15,000 students in Pre-K through 12<sup>th</sup> grade in Miami Dade, Broward, Palm Beach, St. Lucie, Monroe and Duval Counties as well as in San Antonio, Texas. The institution and its board of directors have over a decade of experience in charter school operations and management and oversight of public funds.

Somerset Academy has developed a multi-tier system (management, instruction, assessment, and professional development) that has achieved increased performance across all student populations and subgroups as evident by their academic performance over the past 14 years. Somerset Academy has been able to implement unique and innovative strategies aimed at student achievement and have proven these strategies to be successful with all student populations, including ELL and Special Education students, as well as those entering the school below grade level. The results on standardized exams and learning gains, especially in mathematics, have proven its success. Somerset has successfully replicated nearly 50 other high quality programs across the Southern United States, which have and continue to increase student performance in grades K-12.

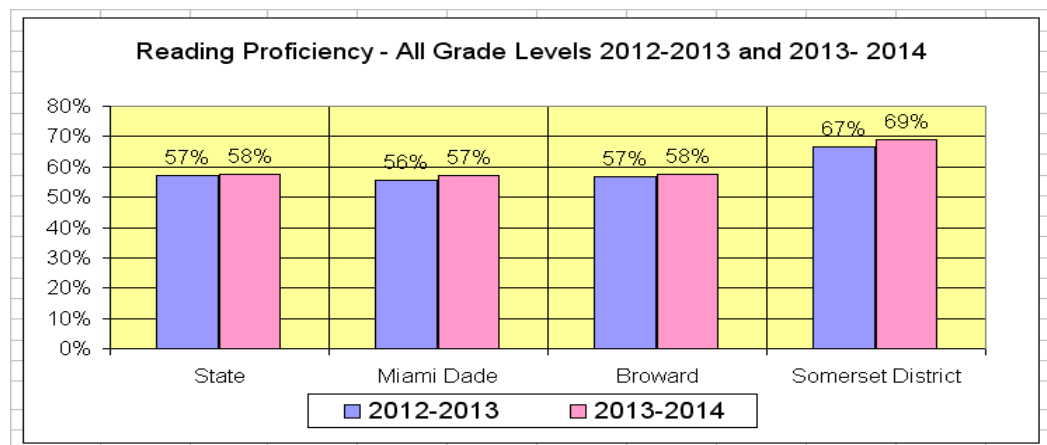
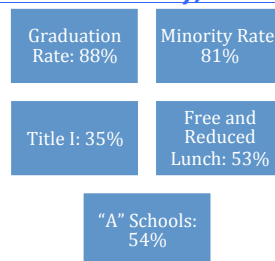
**The “Neighborhood School” Philosophy** - Somerset schools share a common philosophy of student expectations, a unique code of excellence, an expectation of parental commitment, and collaborative management infrastructure derived from the inception of its first school, Somerset Neighborhood. The “best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

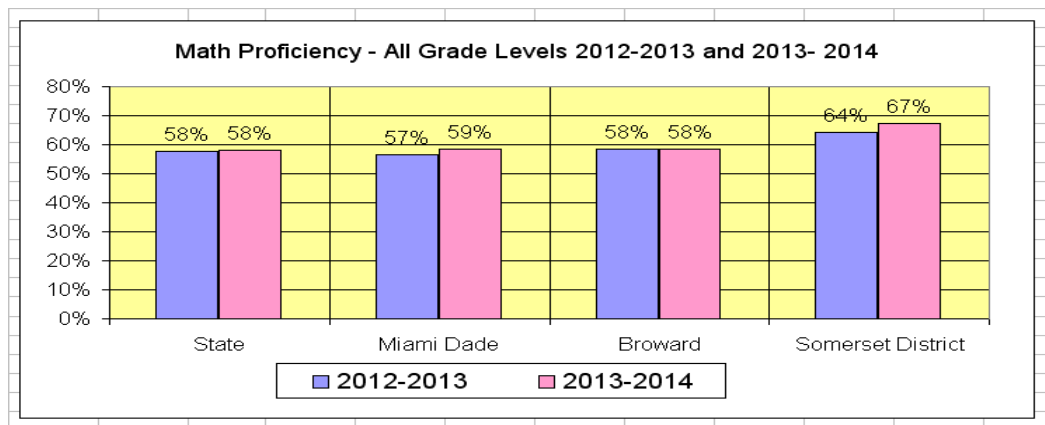
Varying from 150 to close to 4000 students, all Somerset programs have implemented the “neighborhood” school paradigm into its management procedures to consistently maintain a small school environment where students can excel and parents are included in the process. From facilities design to academic program approach, every Somerset school is unique in that it is intended to serve the immediate needs of its local community.

Since it’s inception in 1997 and over the years, Somerset Academy, Inc.’s founding staff has transformed into an accomplished team wherein founding teachers have become Somerset principals and administrators in its successfully replicated schools. Cultivating this leadership atmosphere, Somerset Academy, Inc. has a retention rate of over 90 percent inclusive of founding board members, administrators, and teachers.

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

**Somerset Academy, Inc. 2014-2015**





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

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

### The Somerset System

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

Somerset bridges all the schools together through scheduled leadership telephone chats, use of Somerset Docs, and Somerset programs, such as New Teacher Academy, Professional Development, Coaches Meetings, Principal Leadership Program, Retreats, Conferences, and site-visits. There is always time for the Somerset Inc. Executive Director of Education or one of her fellow leadership colleagues to visit a new or existing Somerset to assist with whatever is needed no matter how near or far. The Education Service Provider, at the request of the board, may also

sends out experts to lend a hand and to support school initiatives. No Somerset leader ever feels that they are alone. The Executive Director of Education visits each school and performs campus reviews along with the organizations President and Vice President, are assisting with campus reviews to ensure all schools receive the necessary support.

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

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

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

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



## Section 4: Curriculum Plan

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

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

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

- ❖ continuous review of curriculum to ensure a year's worth of learning of all state standards
- ❖ research-based instructional practices (i.e., Marzano's High Yield Teaching Strategies, the Eight-Step Instructional Process, and Coalition of Essential School's Principles);
- ❖ principal evaluation through weekly classroom walkthroughs (principal is expected to have strong awareness that all teachers are utilizing the best practices and implementing the instructional initiatives with fidelity)
- ❖ the School Improvement Plan (SIP) will be used as a quality assurance tool to ensure that the curriculum goals are being accomplished.
- ❖ assessment data to make instructional decisions and plan interventions
- ❖ staff development through the implementation of Professional Learning Communities (i.e., Common Planning, ongoing whole staff and small group professional development, Lesson Study and Action Research
- ❖ weekly grade level and monthly staff meetings
- ❖ ongoing professional development workshops
- ❖ before and afterschool tutoring for remediation and acceleration
- ❖ implementation of Response to Intervention, which targets students who struggle in literacy and/or mathematics and students performing below grade level.
- ❖ integration of long-term thematic projects across the curriculum to promote students' abilities to gather, build, and present knowledge through research and the integration, comparison, and synthesis of ideas
- ❖ ELL and ESE strategies across the curriculum
- ❖ focus on differentiated instruction
- ❖ integration of technology across all major disciplines
- ❖ focus on the selection of resources that have text complexity/rigor
- ❖ incorporation of Webb's Depth of Knowledge to springboard critical thinking
- ❖ integration of speaking and listening performance activities that entail both real time engagement and advance preparation.

The School's curriculum will require students to interact with one another, apply curriculum to real-life situations, and use a variety of technological tools beyond the physical classroom. Teachers will incorporate various teaching strategies to accommodate all learning styles as described in Section 3. In accommodating individual learning styles and needs the School's curriculum incorporates the following instructional practices:

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

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

► **Gradual Release of Responsibility Model (teacher-directed instruction/modeling/guided practice/independent practice):** this methodology will be used when teachers need to explain or demonstrate specific content and skills. Explicit, systematic instruction will be based on the Florida Standards. This instruction is structured and based on mastery learning. Once the information and/or skill has been modeled, students will move to a period of guided practice, and then to independent practice and assessment. Frequent curriculum-based assessments help place students in ability groups for further differentiated strategies and identify students who require additional intervention.

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

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

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

► **Information Processing Strategies:** Teaching students "how to" process information is a key factor in teaching students how to strategically organize, store, retrieve, and apply information presented. Students will be given a "toolkit" of sorts from which they can pull the skills developed and utilize them at the appropriate time, thus building autonomy and instilling an intrinsic motivational structure for learning.

► **Rubrics:** Explicitly teaching students a set of criteria for assessing a particular type of work or

performance.

► **Positive Behavior Support:** We believe that both teachers and students need to be provided with a consistent behavior management system so that maximum time can be spent teaching and learning. Inappropriate behaviors that interfere with the learning process and the expectations set for character development can be reduced and ultimately extinguished through consistent, best practice behavior management techniques. (i.e., Conscious Discipline and Love and Logic)

Behavior management based on a positive reward/point system will be in place in all classrooms from the beginning of the first year of operation. Pre-service and in-service training will be required of all teachers. Each teacher, then, will be given the opportunity to implement her/his own behavior management techniques in their respective classrooms. The ultimate goal will be to eventually remove these extrinsic systems from the classrooms, based on the theory that appropriate behaviors will be internalized and external reward systems will no longer be necessary.

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

#### **English Language Arts**

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

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

The implementation of the Florida Standards will offer a focus for instruction and help ensure that students gain adequate exposure to a wide range of texts. Rigor is also infused through the requirement that students read increasingly complex texts through the grades. Students will also demonstrate an increasing sophistication in all aspects of language use, from vocabulary and syntax to the development and organization of ideas, while strengthening the reading-writing connection. Students advancing grade to grade are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in the previous year. The list below

provides the strands of the standards that will be addressed in grades K-5 for English Language Arts:

**Language Arts Florida Standards (LAFS) Strands:**

- ❖ Reading Standards for Literature (RL)
- ❖ Reading Standards: Foundational Skills (RF)
- ❖ Reading Standards for Informational Text (RI)
- ❖ Writing Standards (W)
- ❖ Standards for Speaking and Listening (SL)
- ❖ Language Standards (L)

The School will use the state-approved Houghton Mifflin Harcourt Florida Journeys or other state-adopted text in the instruction of English Language Arts. The School's text selection will be modified as per the Sponsor's text adoption and modification to the CRRP throughout the duration of the charter.

The School's English/Language Arts program includes strategies for students reading at grade level or higher, as well as for students who are reading below grade level. It is expected that students will master reading, writing, and verbal skills through continuous infusion of reading skills in all subject areas. The program emphasizes critical and creative thinking skills through instruction aligned to the Florida Standards. Lessons will be based on broad topics covering the reading process for literature and informational texts, foundational skills, the writing process, speaking and listening, language, and reading and research.

**The Writing Process:** All students will be required to write on a daily basis across the curriculum and in a variety of genres (i.e. Argumentative, Informative/Explanatory, and Narrative Writing). Each class will be responsible for an ongoing writing project that is appropriate to each grade level beginning in Kindergarten. Special emphasis will be made in grades 3-5 to prepare students for the types of writing that will be assessed on the Florida Standards Assessment, namely Opinion and Informative writing. Ongoing instruction will take place on elements of the writing process, including: development, organization, and style as appropriate to task; purpose and audience; planning, revising, editing, rewriting, or trying a new approach; the use of technology to produce and publish writing and interact and collaborate with others; and conducting research to build and present knowledge which will help students to become effective writers and enhance student performance on District and State writing assessments. Writing will also be stressed throughout the curriculum through projects such as daily journal entries and a school newspaper. The use of technology in the writing process further enhances the program, as students publish their work. Writing before, during, and after the main text selection from the state adopted text will provide systematic, explicit writing instruction and ample practice in spelling, grammar, usage, and mechanics daily. Teachers will use various methods to assist students in mastering the writing process. Methods such as Four Square Writing Method and computer-based programs such as MyAccess will be utilized in the classroom to implement writing lessons.

**Grades K-5** - At the completion of the course, students will have achieved a year's worth of learning by mastering, at minimum, the objectives and concepts aligned to the Language Arts Florida Standards (LAFS) for that grade level. The School will also include a strong language arts component with teachers using oral book lectures, poetry readings, roundtable discussions of novels, literature circles, Socratic seminars, and creative and individualized writing instruction. Components of Dance, Art and Theater, and Music will be incorporated into Language Arts activities promoting culturally responsive instruction to meet the diverse needs of all learners.

**Novels:** In addition to the core ELA curriculum, during class time students will read up to 4 novel per school year directed and led by the teacher. The activities and instruction provided in conjunction with the novels are aligned to LAFS in addition to a variety of texts including fiction, non-fiction, and poetry. Novels are chosen by department heads.

### **Mathematics**

The School will use the state-approved Houghton Mifflin Harcourt Go Math! MAFS Series, Curriculum Associates Florida Ready or other state-adopted text in the instruction of mathematics. The School's text selection will be modified as per the Sponsor's text adoption and modifications throughout the duration of the charter. The mathematics curriculum will be aligned with the Mathematics Florida Standards (MAFS) by grade level for grades K-5.

The mathematics curriculum for grades K-5 at the School will focus instruction based on the content emphases by domains that are important to understanding, fluency, and application of mathematics ideas to problem solving.

#### **Content Emphases by Domains:**

- ❖ Counting and Cardinality (K)
- ❖ Operations and Algebraic Thinking (K-5)
- ❖ Number and Operations in Base Ten (K-5)
- ❖ Number and Operations – Fractions (3-5)
- ❖ Measurement and Data (K-5)
- ❖ Geometry (K-5)

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

**Problem Solving:** Engage in tasks for which the solution method is not known in advance.

**Reasoning and Proof:** Think analytically.

**Communication:** Share ideas and clarify understanding.

**Representation:** Understand ways in which mathematical ideas are represented.

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

Additional resources, such as thinkcentral.com, Study Island, State web-based online practice test and resources will help supplement lessons. Mathematics activities will also include mental math, math stories, math games, and competitions.

***Somerset Academy (Broward County) Mathematics Performance 2002-2014:***

| School Name             | School Year | Grade | % Meeting High Standards in Math | % Making Learning Gains in Math |
|-------------------------|-------------|-------|----------------------------------|---------------------------------|
| <b>SOMERSET ACADEMY</b> | 2013-14     | A     | 79                               | 68                              |
|                         | 2012-13     | A     | 77                               | 73                              |
|                         | 2011-12     | A     | 72                               | 67                              |
|                         | 2010-11     | A     | 86                               | 83                              |
|                         | 2009-10     | B     | 84                               | 86                              |
|                         | 2008-09     | A     | 86                               | 85                              |
|                         | 2007-08     | A     | 80                               | 81                              |
|                         | 2006-07     | A     | 78                               | 82                              |
|                         | 2005-06     | A     | 76                               | 82                              |
|                         | 2004-05     | A     | 76                               | 81                              |
|                         | 2003-04     | A     | 71                               | 75                              |
|                         | 2002-03     | B     | 68                               | 73                              |

At the completion of the course, students will have achieved a year's worth of learning by mastering, at minimum, the objectives and concepts aligned to the MAFS and within the scope present in the Sponsor's curriculum pacing guides.

**Science**

The School will use the state-approved Houghton Mifflin Harcourt Florida Science Fusion, alongside their digital software and multimedia, or other state-adopted text in the instruction of science. The science curriculum will prepare students to achieve the Next Generation Sunshine State Standards (NGSSS) infused with the LAFS by incorporating an inquiry based approach to learning of the central science themes: matter and energy, force and motion, earth and space, processes of life, and the scientific method. In addition, supplemental materials such as *Scholastic*, *Science Weekly*, *National Geographic* and/or other comparable scientific magazines may be used. Teachers will utilize both the NGSSS and the LAFS in their daily lesson plans, infusing literacy throughout the content areas. Moreover, students will participate in weekly hands-on science investigations, exposing students to the scientific process and scientific thinking. In grades 4-5, students will be encouraged to participate in Science Clubs where they will be able to explore and investigate the steps to the scientific method.

Additionally, the School will take an active approach regarding science instruction. Teachers will be encouraged to engage students through the following ways:

- ❖ Quantitative and qualitative observations
- ❖ Investigation of thoughtful questions
- ❖ Design and conduct experiments and other types of investigations
- ❖ Collect and organize data

- ❖ Make logical predictions and offer reasonable explanations
- ❖ Explore possible conclusions
- ❖ Communicate their understanding by infusing literacy instruction and furthering the reading-writing connection.

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

- ❖ Scholastic Magazine
- ❖ Technology: Including but not limited to, Safari Montage, GIZMOS, and Brainpop - computer-based programs will assist students visually in understanding science concepts.

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

### Social Studies

The School will use the state-approved MacMillan/McGraw Hill Social Studies series or other state-adopted text in the instruction of social studies, in addition the weekly Scholastic magazine/web-based social studies series and novels. The social studies curriculum includes the study of related knowledge and modes of inquiry selected from history, the humanities, and the social sciences, including anthropology, archaeology, economics, geography, history, law, philosophy, political science, psychology, religion, and sociology.

Thematic units have been designed that integrate the various subjects and address key areas of social studies in alignment with Next Generation Sunshine State Standards and the LAFS. Character Education components (respect, honesty, responsibility, self-control, tolerance, kindness, citizenship and cooperation) will be emphasized individually through thematic lessons and group projects.

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

- ❖ Emphasize content, concepts, and skills from the social sciences, the humanities, and, where appropriate, mathematics, ELA, and the natural sciences;
- ❖ Reflect a clear commitment to democratic beliefs and values;
- ❖ Encourage civic responsibility and active participation;
- ❖ Promote high expectations for all students;
- ❖ Incorporate a multicultural perspective;
- ❖ Reinforce the development of a global perspective;
- ❖ Promote understanding of social, political, and economic institutions;

- ❖ Encourage student involvement in community service;
- ❖ Focus on the identification of the potential solutions to local, national, and world problems;
- ❖ Involve students in their learning by using a variety of teaching strategies and instructional materials; and
- ❖ Promote an interdisciplinary approach to learning by furthering literacy instruction and the reading-writing connection.
- ❖ Participate in “Celebrate Freedom Week”

Students shall also receive instruction in:

- ❖ The Holocaust
- ❖ African and African American History
- ❖ Hispanic Contributions
- ❖ Women’s Contributions
- ❖ Veterans’ Contributions
- ❖ the principal of democracy, its governmental and political structure, how to preserve and advance democracy and how students may contribute to the American way of life

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

**Character Education** - Instruction in the nine core character education values of citizenship, cooperation, fairness, honesty, integrity, kindness, pursuit of excellence, respect, and responsibility will be infused within the curriculum. On a monthly basis, the school will hold an assembly to recognize one student per class who exemplifies the character trait of the month.

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

- ❖ Establish programs to reach an ultimate goal of a 1:1 ratio of devices to students by lease or purchase (Bring Your Own Device BYOD Programs, lease programs, etc.)
- ❖ Examination of the appropriateness and uniformity of Bring Your Own Device options.
- ❖ Policies and specifications for minimum requirements for devices and digital content and internet safety



- ❖ Development of an appropriate digital curriculum first and then obtain the device which best delivers the curriculum.
- ❖ Using existing resources, including Virtual School content and vetted free digital materials (such as Khan Academy lessons and CK-12 Foundation resources)
- ❖ Accommodations to create equal opportunity for all students to access instructional content, utilizing options such as: Assistance programs to help families that cannot currently afford internet service; and The loading of necessary resources on a student device for accessibility when an internet connection is unavailable.
- ❖ On-going differentiated professional development for educators, including administrators, ranging from teacher/administrator education programs to new teachers/administrators.
- ❖ Establishment of optimum infrastructure guidelines to support digital access\*

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

**B. Describe the research base and foundation materials that were used *or will be used to* develop the curriculum.**

A tremendous amount of research has been conducted on effective practices for improving student learning to create the most effective curriculum possible. This research provides the basis for pedagogy at the School. In addition to utilizing the sponsors approved curriculum, selected successful practices will be used in all of the academic courses. However, it will be expected that in addition to these practices, teachers will also implement research-based strategies as applicable through their own subjects.

The School's educational program is specifically designed to improve the academic performance of all students, including at-risk students, by tailoring curriculum to individual learning styles, by focusing on strengths, by setting high academic expectations, by viewing differences as assets rather than liabilities and by incorporating best educational practices into the classroom and the curriculum. Differentiated instruction throughout the curriculum will assist all students in reaching their highest potential.

The School will employ various research-based approaches, including the nine (9) principles set forth by Dr. TheodoreSizer's Coalition of Essential Schools detailed in *Section 3* of this application, in support of the educational mission. Effective strategies such as tutoring will be used not only to adapt instruction for students who need additional help but also to enrich instruction for students able to accelerate their learning. Additionally, high expectations will be set for all members of the School, creating a culture that encourages success. The curriculum of the School will meet and in some cases exceed the requirements to be considered a rigorous program. The School will also implement hands on learning, inquiry-based research projects, science experimentation, hands-on technology that is integrated and problem driven, CRISS (Creating Independence through Student-

owned Strategies), Reciprocal Teaching, and the Small learning communities philosophy. Additionally, the School has utilized a great deal of research conducted on learning a second language, which points to heightened success for students who engage in its study.

**C. Describe the school's reading curriculum. Provide evidence that reading is a primary focus of the school and that there is a curriculum and set of strategies for students who are reading at grade level or higher and a separate curriculum and strategy for students reading below grade level.**

*The reading curriculum must be consistent with effective teaching strategies and be grounded in scientifically-based reading research.*

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

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

The school will support the *Just Read, Florida!* initiative in assisting all students in becoming successful, independent, and comprehensive readers by adopting the Broward County Public Schools Comprehensive Research-Based Reading Plan to provide teachers with a systematic framework for literacy instruction. Since certain text and assessments are currently being modified, the School will adopt the plan in effect during the 2015-2016 school year. The School's text selection will be modified as per the Sponsor's selection of state-adopted texts and modifications for 2015 and throughout the duration of the charter.

The reading program will cover the Formula for Literacy Success:  $7 + 4 + ii = iii$

**7 Essential Literacy Components** - Oral Language, Phonemic Awareness, Phonics, Fluency, Vocabulary, Comprehension and Writing

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

**ii: Initial Instruction –**

- ❖ Minimum 90-minute uninterrupted literacy block daily
- ❖ Core curriculum provided to all learners
- ❖ Comprehensive core literacy program
- ❖ Strategically builds on background knowledge,
- ❖ Is motivating, engaging and relevant
- ❖ Makes reading/writing connections
- ❖ Uses data-driven instructional planning and progress monitoring of instruction

- ❖ Explicit and systematic instructional strategies
- ❖ Coordinated instructional sequences
- ❖ Print-rich environment
- ❖ Whole group and small group delivery with flexible grouping and independent/peer collaborative practice
- ❖ Differentiated and scaffolded support, targeting specific needs of students
- ❖ Interdisciplinary literacy

### iii: Immediate Daily Student Intervention

- ❖ Intervention provided to striving learners daily, beyond the 90-minute block (extended time)
- ❖ Supplemental/comprehensive intervention
- ❖ Smaller group delivery (flexible grouping)
- ❖ Differentiated and scaffolded support, targeting specific needs of students
- ❖ Makes reading/writing connections
- ❖ Provide students with reading deficiencies tailored services (accommodations)
- ❖ Ongoing-progress monitoring through the PMP

### Student Placement

The decision to participate in daily student intervention will be made in accordance with the District's CRRP by student's performance on the prior year's FSA or other Standards-Based assessment to be approved by the FLDOE in the case of ELA and data from diagnostic assessments such as State assessments like the FAIR-FS, progress monitoring, and teacher recommendations. To further elaborate, the K-12 CRRP requires each school to conduct a screening and diagnostic process to identify appropriate placement of students scoring below proficiency on the FSA or other Standards-Based assessment to be approved by the FLDOE. The K-12 CRRP also requires a daily double block for all students who have reading deficiencies in decoding and fluency. Some high achieving students slightly below proficiency on the FSA or other Standards-Based assessment to be approved by the FLDOE in the case of ELA as per the CRRP may receive reading interventions.

To that end, the School intends to implement, as necessary, based on student data, the following programs as detailed below, and within District guidelines for placement, will deliver research based-programs and quality Common Core Standards-driven instruction. Students at the school who score below proficiency on the FSA or other Standards-Based assessment to be approved by the FLDOE in the case of ELA will complete an intensive reading course. Passing scores on FSA and concordant scores on other assessments will not be used to exempt students from required intensive reading courses.

Students scoring below proficiency on the FSA or other Standards-Based assessment to be approved by the FLDOE in the case of ELA and who have intervention needs in the areas of decoding and/or fluency will have an extended block of reading intervention, either through a double block of intensive reading, small group or one-on-one intervention. This block of time will

be taught by the classroom teacher and/or interventionist, who will be highly qualified to teach reading or working toward that status (pursuing the reading endorsement or K-12 reading certification). Classroom infrastructure will be at a ratio of no more than 25:1, and have appropriate and adequate CIRP and SIRP materials (detailed below) to address learner needs. Furthermore, the reading intervention course will include daily:

- ❖ whole group explicit, systematic, and scaffold instruction;
- ❖ small group differentiated instruction;
- ❖ independent reading practice monitored by the teacher;
- ❖ infusion of benchmarks specific
- ❖ Reading and writing connection
- ❖ a focus on informational text at a ratio matching Florida Standards Or a balanced approach to complex text in both literature and informational formats at a ratio matching the Florida Standards.

### Instructional Models

Guided by teacher instructions, reading teachers will model effective reading strategies and guide students through pre-reading, during reading, and post-reading techniques that will empower students to self-monitor their own comprehension.

Teachers will use explicit, systematic, direct and differentiated instruction in their curriculum delivery to promote student collaboration and meaningful academic discussions and inquiry while implementing the above-mentioned research-based strategies as follows:

- ❖ **Systematic instruction:** will involve a carefully designed sequence plan for instruction. The plan for systematic instruction is carefully thought out, strategic and designed before activities and lessons are developed. Systematic instruction is clearly linked within, as well as across, the seven elements of reading instruction (oral language, phonemic awareness, phonics, fluency, vocabulary, comprehension and writing). For systematic instruction, lessons build on previously taught information, from simple to complex, with clear, concise student objectives that are driven by ongoing assessment. Students are provided with the Gradual Release of Responsibility Model which appropriately paces lessons to move from teacher-directed instruction to student-centered learning.
- ❖ **Gradual Release of Responsibility Model:** is an instructional approach that utilizes explicit and structured teaching routines. A teacher using direct instruction models, explains, and guides the students through extended practice of a skill or concept until mastery is achieved. The lessons are properly paced to allow for students to move from modeling/demonstration, shared practice, guided practice and eventually independent practice where students are academically engaged, and teachers are enthusiastically delivering instruction.
- ❖ **Differentiated Instruction:** meets the demands of the differing learning abilities in the same class. For optimal instruction, students will be grouped in various ways and in a flexible

setting to accommodate varying reading levels and learning styles. Teachers will utilize the methods of whole-group instruction, small-group instruction, individual instruction, and independent reading to address the various needs of the students.

- ❖ **Print Rich Environment:** Each class will maintain a classroom library to include a collection of quality literature that includes material written at varying reading levels and in a variety of genre forms, inclusive of both fiction and nonfiction. This collection will offer students reading material that will support their individual interests and abilities. Frequent, successful reading experiences using appropriate texts will provide the opportunity to improve their reading proficiency with regard to fluency, vocabulary, and comprehension. The books in the classroom library will be attractively displayed to exhibit an inviting accessibility to all students. Teachers will organize classrooms to afford students ample opportunities for, and easy access to, reading materials during literacy center time within the daily reading block.
- ❖ **Word Walls:** Teachers will create effective word walls that consist of high frequency words, word patterns or morphological elements, and interesting, exciting words. Students will use word walls interactively during lessons and activities to practice a variety of literacy skills.
- ❖ **Literacy Stations:** will be set up throughout the room in various areas that allow students to work independently or in a small group setting, using instructional materials to explore and expand their literacy skills. During this time students are engaged in a variety of activities that reinforce and extend learning without the assistance of the classroom teacher. Students will practice reading, writing, speaking, listening, and working with letters and words. An example might include the use of manipulatives such as magnetic letters and sound letter cards are used to increase active participation and provide additional guided practice through multi-sensory approaches.
- ❖ **Sustained Silent Reading:** Increments of independent, sustained silent reading will be included in the reading classroom to help students build stamina for increasingly longer and more challenging text. Teachers must monitor for engagement. Reading logs, reaction journals, text talk, book passes or story summaries help students make connections to text.

**The Comprehensive Core Reading Program (CCRP)** All students will participate in a daily 90-minute uninterrupted reading block embedded within a 120-minute literacy block and beyond to a 180-minute interdisciplinary block of instruction. The 90-minute reading block will consist of whole group and small group differentiated, instruction (ii) with independent and peer collaborative application of skills/strategies in literacy centers. This initial Tier 1 universal core instruction is explicit, systematic, scaffolded, differentiated, guided by data analysis, and focused on the seven essential components of literacy (oral language, phonemic awareness, phonics, fluency, vocabulary, comprehension, and writing) that comprise the Language Arts Florida Standards (LAFS). The school will use the state-approved comprehensive core literacy program Houghton Mifflin Harcourt Journeys Common Core series, or other state-adopted text, as the foundation of literacy instruction, which is comprised of scientific, research-based instructional practices and

methodologies, designed to support all students in the core literacy curriculum. ELL students will follow the comprehensive literacy program using the Houghton Mifflin Harcourt Florida Journeys Common Core Reading Program with the grade level text and the support of the *English Language Learners Kit* and the *Language Support Leveled Readers Kit*. The School's text selection for the Core Reading program will be modified as per the Sponsor's selection of state-adopted texts throughout the duration of the charter.

Activities will meet the needs of on-level learners, advanced learners, below-level learners, and English-language learners. Aligned instructional materials, such as decodable books and leveled books, will be used for individual and group practice opportunities. The School will tailor all instruction to ensure that students are prepared to independently read the range and complexity of texts, balancing information and literacy. To achieve mastery of and align instruction to the LAFS, literacy instruction will be focused upon across all content areas using the CCRP and all supplemental resources available in the School. The focus of the School will be to build foundational skills prior to and beyond the 3<sup>rd</sup> grade.

**Supplemental Intervention Reading Programs (SIRP)** will provide instruction that primarily focuses on one single essential component of reading (i.e., oral language, phonemic awareness, phonics, fluency, vocabulary, OR comprehension) intended to extend beyond the initial instruction of a Comprehensive Core Reading Program (CCRP). The School may use the following approved research-based programs:

- ❖ Elements of Reading, Vocabulary (k-5)
- ❖ Rewards Intermediate Level (4-5)
- ❖ Road to the Code (K-1)
- ❖ QuickReads (1-5)
- ❖ Rigby Newcomer Kits (3-5 for ELL- Levels I, II, III)
- ❖ Soar to Success (3-5)
- ❖ Guided Leveled Readers K-5
- ❖ Word Wisdom by Zaner-Bloser (3-5)
- ❖ Accelerated Reader - to encourage independent reading
- ❖ Reading Plus
- ❖ Accelerated Literacy Learning (A.L.L.)
- ❖ Wilson Reading
- ❖ Words Their Way
- ❖ 6 Minute Solutions (K-5)
- ❖ Foundations
- ❖ Super QAR (1-5)

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

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

The school may use the following programs in providing targeted differentiated intervention support to meet the specific needs of struggling readers:

- ❖ Voyager Passport- K-5
- ❖ Wilson Foundations
- ❖ Measuring Up- 3-5
- ❖ FCAT Coach- 3-5
- ❖ Wilson Reading (3-5)
- ❖ Super QAR (3-5)
- ❖ Words Their Way (K-5)
- ❖ Triumphs
- ❖ REWARDS

**Technology Resources:** Safari Montage, Voyager, SuccessMaker, Reading Plus, Achieve 3000, iReady, Accelerated Reader, IXL Math, Study Island, Reading Eggs, Education City

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

The Literacy Leadership Team may be comprised of the Principal, Literacy Specialist, Media Specialist, ESE Teacher, ESOL Coordinator, Testing Chair, Department Chairs, and Reading Teachers. The Literacy Leadership Team will meet on a regular basis to:

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

The administrative team will conduct classroom visitations, monitor lesson plans and ensure that reading strategies are implemented across the curriculum. Teachers needing assistance will be supported by reading coordinators through the implementation of the coaching model of instruction (pre-conference, modeling, co-teaching, post conferencing, observation, and reflection). In addition, all faculty members must address strategies for reading instruction in their annual Professional Growth Plans (PGP), which are aligned with The Florida Consortium's evaluation tool



implemented by the Sponsor. These strategies must be constantly updated based on the results and analysis of progress monitoring in reading.

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

**Screening and Progress Monitoring:** Assessments will be used to (1) monitor students' progress in English/Language Arts as well as mathematics, according to the Florida Standards; (2) provide teachers with classroom assessment tools that will provide student achievement data; and (3) provide students with information on their progress on specific benchmarks. The assessments include but are not limited to:

- ❖ **Screening:** Students will be screened using the Florida Assessments for Instruction in Reading-Florida Standards (FAIR-FS) (K-5), Informal Reading Inventory (IRI) (3-5), or any assessment mandated by the Sponsor's CRRP.
- ❖ **Progress Monitoring:** Students will be progress monitored three times per year using the Florida Assessments for Instruction in Reading-Florida Standards (FAIR-FS). The school will use the progress monitoring tools designated by the Sponsor's CRRP for 2014 which may include the FAIR-FS (grades K-5) or Houghton Mifflins' Harcourt Florida Journeys Common Core Oral Reading Fluency Probes (grades 1-5).

ELL students in grades K-5 will be administered the Comprehensive English Language Learning Assessment (CELLA) each spring to measure proficiency and gains in reading, writing, listening, and speaking. ELL students will also be assessed using the IDEA Oral Language Proficiency Test (IPT) every four months to measure growth in speaking and listening. Teachers will keep data portfolios, or folders, of student assessment results and progress in their classrooms to provide additional data of student progress for district and school-based monitoring. More information on these assessments are provided in Section 7 of this application.

**Diagnostic Assessment:** Wilson Foundations (K-5), Florida Assessments for Instruction in Reading-Florida Standards (FAIR-FS)(K), and Diagnostic Assessments of Reading (DAR) (1-5).

**Outcome Measures:** Florida Assessments for Instruction in Reading-Florida Standards (FAIR-FS) and Rigby PM Benchmark (K-2) and FSA or state approved assessment test (3-5).

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



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

3.3.5. Collaborative and coordinated efforts within the school and between the school and home

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

**Professional Development:** The Literacy Specialist, in conjunction with the Literacy Leadership Team (LLT), will design workshops to address the needs of classroom teachers for instruction. The Literacy Specialist will meet with the LLT and grade levels/departments to review these results and share best practices. For further intensification, demonstration lessons, in-class coaching, peer observation and additional professional development opportunities will be made available to the faculty.

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

- ❖ Differentiated Instruction (3 suggested sessions)
- ❖ Content-Area Classroom Libraries (1 suggested session)
- ❖ Vocabulary Strategies/ Word Walls (1 suggested session)
- ❖ Reciprocal Teaching (3 suggested sessions)
- ❖ Culturally Responsive Instruction (1 suggested session)
- ❖ Close Reading Practices (1 suggested session)
- ❖ Providing Effective Feedback and Checks for Understanding (1 suggested session)
- ❖ Text Complexity (1 suggested session)
- ❖ Goal Setting for the classroom, small groups, and individual students, Formative Assessments, and Rubrics (2 suggested session)

**D. Explain how students who enter the school below grade level will be engaged in and benefit from the curriculum.**

It is the strongly held belief of the School that all students can and will be given every opportunity to be successful. Students with identified disabilities, limited language proficiency, or those in the RtI process will be accommodated within the parameters of their IEPs, ELL plans, or any other documentation relating to their educational needs. If documentation reveals students to have previously been undergoing Tier II or Tier III academic interventions in the RtI process or who enter the school demonstrating deficiencies in a given academic area will be placed under observation to see if the interventions need to be continued. The School will also adhere to all applicable

provision of Federal law relating to the education of students with disabilities, including the Individuals with Disabilities Education Act; section 504 of the Rehabilitation Act of 1974; and Title II of the Americans with Disabilities Act of 1990.

All students will be engaged in and benefit from the curriculum including ESE, ELL, and/or students who enter the school below grade level. Results of the most recent teacher-made tests, and available screenings, coupled with the results of the prior year standardized tests results and student records, will be used to determine the best educational setting for students (e.g., appropriate course selection, tutoring, referral for special services).

Apart from providing the specific services listed in a student's IEP, EP, and/or ELL plan as applicable, the School's faculty will differentiate instruction as necessary and will offer tutoring services or other such assistance to ensure all students remain successful. Student performance will be continuously assessed as described in the *Section 5* below. Students not making adequate progress towards the Standards will be identified and the following measures will be instituted:

- ❖ Students consistently demonstrating non-mastery of the standards as evidenced on teacher generated quizzes, chapter tests, projects, investigations, and poor academic progress will be targeted for supplemental and intensive instruction/intervention
- ❖ Early bird, Super Saturday, and daily pull-out tutoring may be required for those students consistently demonstrating non-mastery
- ❖ All students not meeting standards will be placed on a Progress Monitoring Plan and specific strategies to remediate any learning deficiencies will be implemented.
- ❖ Reading strategies in the content areas will be provided to students in addition to those taught during English language arts classes.

Students needing remediation based on respective subject area assessments in specific subject areas will be assigned to and placed on a specific Progress Monitoring Plan (PMP) targeting these deficiencies. This plan requires active participation from the student, the parents and specific teachers in order to ensure continuous student improvement. This initiative allows each student to have ownership and understanding of his/her learning style and allows each student to track and monitor his/her achievement. The PMP will be comprised of specific, measurable, individualized goals for that student as well the strategies and services (tutoring/required additional classes, ELL services) to be implemented in order for the student to achieve the specified goals.

#### **E. Describe proposed curriculum areas to be included other than the core academic areas.**

##### **Special Areas and Electives**

**P.E./Recess** -The physical education program will consist of the required 150 minutes of PE/Recess per week for grades K-5, and will communicate knowledge, offer group experiences, teach the joy of effort and achievement, and build lasting recreational interests. The program will strive to be in step with the current practices and procedures in education and to contribute to the all-around development and education of students.

**Foreign Language** - The School will focus on developing students' understanding of international and cross-cultural issues as well as their ability to communicate in more than one language. Thus, the school will implement Spanish as a foreign language program for both non-speaking and Spanish-speaking students in grades K-5.

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

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

**Science Lab** – The School aims to further the goals of the National Science Teachers' Association (NSTA), including that of using science labs "to help students develop a deep understanding of the science content, as well as an understanding of the nature of science, the attitudes of science, and the skills of scientific reasoning." Thus, the goal of the structured science lab special area instruction is to provide real world connections and science experiments and to further foster a love of the subject while fostering meaningful understanding of science.

These added curriculum areas will enhance all the core academic areas to improve academic success. The areas will be enriched with the core academic areas to enhance and improve learning.

**Media** – Students will be given exposure to and instruction in the safe and academic use of technology.

#### **F. Describe how the effectiveness of the curriculum will be evaluated.**

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

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

Additionally, the School's accreditation from AdvancED (formerly *Southern Association of Colleges and Schools Council on Accreditation and School Improvement* [SACS/CASI]), also serves as a means to evaluate not only the effectiveness of the curriculum but also the entire school program. The School will continuously: validate compliance with numerous AdvancED learning standards; demonstrate engagement in continuous improvement, including the development and implementation of foundations for continuous improvement; provide for quality assurance; and participate in a peer review process.

## Section 5: Student Performance, Assessment and Evaluation

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

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

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

### ELA:

- ❖ At least 70% of students in Kindergarten will score at or above the 50<sup>th</sup> percentile on the Stanford Achievement Test – 10<sup>th</sup> Edition (SESAT 2 Sentence Reading)
- ❖ At least 70% of students in grades 1-2 students will score at or above the 50<sup>th</sup> percentile on the Stanford Achievement Test – 10<sup>th</sup> Edition (Reading Comprehension)
- ❖ The school will meet or exceed the District and/or State average (whichever is higher) of students in grades 3-5 meeting high standards in ELA, as evidenced by scoring proficient or higher on the Florida Standards Assessment (FSA) in ELA in 2017 as established by FL-DOE.

### Mathematics

- ❖ At least 70% of students in Kindergarten will score at or above the 50th percentile on the Stanford Achievement Test -10th edition (SESAT 2) Mathematics and/or achieve a passing score on Mathematics Textbook Examinations.
- ❖ At least 70% of students in grades 1-2 will score at or above the 50th percentile on the Stanford Achievement Test - 10th edition Mathematics Problem Solving and/or achieve a passing score on Mathematics Textbook Examinations.
- ❖ The school will also meet or exceed the District and/or State average (whichever is higher) of students in grades 3-5 meeting high standards in Mathematics, as evidenced by scoring proficient or higher on the new Florida Standards Assessment (FSA) in Mathematics in 2017 as established by FL-DOE.

### Science

- ❖ At least 61% of students in grade 5 will meet high standards in Science, as evidenced by earning a score of 3 or higher on the Florida Comprehensive Assessment Test of Science 2.0 to be administered in 2017.

### Program-related Objectives

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

**Evaluating Student Performance and Progress** – The School will participate in the statewide assessment program created under s1008.22, Florida Statutes. As per the *Student Success Act*, school districts will be expected to administer student assessments that measure mastery of course content for each course offered, beginning the 2016-2017 school year. Accordingly, the school will use such state and district-adopted as well as school-based assessments to measure student progress toward mastery of the Florida Standards and applicable NGSSS across all grade levels.

The School will implement the Sponsor's testing calendar and performance measurements, with the same frequency of assessments, as amended from time to time in accordance with district and/or statewide assessments. School-based methods of assessing students' mastery of performance outcomes will consider interim progress reports and report cards, facilitator observations, teacher tests and quizzes, attendance rates, teacher-generated exams, midterm and final examinations, and portfolios.

Students are expected to make annual learning gains toward mastery of the Florida Standards and applicable NGSSS appropriate for the student's grade level. The annual gains will be measured by the student's developmental scale score on the FSA or other state approved standards based test and on internal pre- and post-tests to be administered at the beginning and end of each school year.

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

- ❖ Implement tutoring or Saturday tutoring for non-proficient students (as per state in order to maximize student achievement)
- ❖ Implement parent workshops that will assist with the implementation of effective strategies at home
- ❖ Facilitate student participation in essay, poetry, and book writing contests in order to promote writing success
- ❖ Utilize assessment data, writing pretests, and other ongoing assessments to drive instruction and target remediation
- ❖ Utilize assessment data to drive instruction and target remediation in order to maximize student achievement

- ❖ Implement FSA tutoring program to increase reading levels, implement a variety of literature and maximize the use of standards-based reading components such as phonic and word recognition, reading complex text and responsive writing to text
- ❖ Utilize state-adopted supplemental material in order to increase critical thinking skills
- ❖ Implement flexible scheduling that designates two hours of English Language Arts/Reading instruction and one hour of daily collaborative grade level planning times

In addition to the FSA and all applicable district/State assessments, the School will conduct its own internal pre- and post-testing and regularly scheduled assessment to measure annual gain. The tests will be comprehensive, and will include assessments in listening, reading, spelling, writing, research and study skills, and mathematics. The assessment instrument to be used will ultimately be determined by the testing professional retained to provide that service. Other internal testing and assessment, such as competency-based standardized tests, may also be used by the School to evaluate the effectiveness of its curriculum and teaching methods.

Other methods of assessing students' mastery of performance outcomes will include, but will not be limited to, facilitator observation, peer- and self-evaluations, teacher tests and quizzes, projects, rubrics, presentations, exhibitions, portfolios, and attendance rates. The student portfolios will show not only the student's "best" work, but also drafts of student work that demonstrate progress. Ongoing internal audits (progress reports and report cards) of student performance, including beginning year, mid-year, and end-year assessments, will be utilized as reflective and guidance tools.

English Language learners (ELL) will be assessed and served by ESOL-certified personnel. The School will adopt and abide in all respects by the requirements of the *LULAC et.al. Vs. State Board of Education Consent Decree (1990)*. Further information regarding additional testing of ELL students can be found in Section 7 of this application.

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

Promotion from grade to grade will be in accordance with the requirements set forth in the Sponsor's most current *Student Progression Plan/Promotion Criteria Matrix* as noted in the charts below. Each student must meet specific levels of performance in reading & mathematics in order to be promoted. For each student who does not meet state performance levels in reading, writing, mathematics, and/or science, the School will implement a Progress Monitoring Plan (PMP) to document the methods used to assist the student in meeting expectations for proficiency. In consultation with the parent/guardian, student performance will be evaluated and reported based on mastery of standards to determine a student's eligibility for promotion.

Instructional staff members will utilize such evaluative devices and techniques as may be needed to report individual achievement in relation to school goals, acceptance norms, and student potential. The academic grades in all subjects are to be based on the student's degree of mastery of the instructional objectives and competencies for the subject. The determination of the specific grade a student receives will be based on careful consideration of all aspects of each student's

performance during a grading period: class work, observations, tests, portfolios, district and state assessments, and written progress reports and report cards (at the end of every quarter) should serve as the primary means of communicating student progress and achievement of the standards for promotion. The student's mastery of the content of the course, in which the student is enrolled, as determined by the teacher, is a further condition for passing the course. The School will comply with any and all changes to promotion criteria outlined by the State and/or District.

| <i>Elementary Promotion Criteria for Reading and Mathematics</i> |                                           |
|------------------------------------------------------------------|-------------------------------------------|
| <i>Grade and Subject</i>                                         | <i>Assessment</i>                         |
| K,1, and 2                                                       | Statewide or district-approved assessment |
| 3 Reading                                                        | Statewide or district-adopted assessment  |
| 4 and 5 Reading                                                  | Statewide or district-approved assessment |

Policy 6000.1: Promotion Criteria by Grade Level, 2013-14\*

| <b>Grade</b> | <b>Criteria 1</b>                                                                                                                                                     |    | <b>Criteria 2</b>                                                                                                                                                                                                                                                                                                                                                                            |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>K</b>     | 48 out of 52 Letter Names AND 20 out of 26 Letter Sounds AND 15 out of 21 Concepts of Print.                                                                          | OR | Scores 50% or greater in Probability of Literacy Success (PLS) on the Florida Assessments for Instruction in Reading - Florida Standards (FAIR-FS) during Assessment Period #3.                                                                                                                                                                                                              |
| <b>1, 2</b>  | Scores 55% or greater (Grade 1) and 65% or greater (Grade 2) on the Primary End of Year Reading Test that aligns with the Florida Standards in reading comprehension. | OR | Scores 70% or greater on the Houghton Mifflin Harcourt Florida Journeys Common Core 2014 Benchmark Test (Unit 5) Reading and Analyzing Text section.                                                                                                                                                                                                                                         |
| <b>3</b>     | Scores at or above Achievement Level 2 on the statewide reading assessment.                                                                                           | OR | Scores 45th percentile or greater on the current version of the Stanford Achievement Test in reading comprehension.                                                                                                                                                                                                                                                                          |
| <b>4, 5</b>  | Students must score at or above Achievement Level 2 on the statewide reading and mathematics assessments.                                                             | OR | READING: Scores 70% or greater on the Houghton Mifflin Harcourt Florida Journeys Common Core 2014 Benchmark Test (Unit 5) Reading and Analyzing Text section (Fourth Grade: multiple choice items 1-35, pages 147- 169, Fifth Grade: multiple choice items 1-35, pages 151-178 ). MATH: Scores 60% or greater on the Houghton Mifflin Harcourt Florida Go Math Common Core End of Year Test. |

\* <http://www.broward.k12.fl.us/sar/releases/briefs/PromotionRetention2013-14.pdf>

| <i>Elementary Alternative Promotion Criteria - Good Cause</i> |                                                                                                                                   |                                                                                                                                      |                                                                                                                                                 |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Targeted Students:</b>                                     | Grade 3 Alternative Promotion Criteria Good Cause (State) (F.S. 1008.25(6)(b))                                                    | Grades K, 1, and 2 Alternative Promotion Criteria - Good Cause                                                                       | Grades 4 and 5 Alternative Promotion Criteria - Good Cause                                                                                      |
| <b>All Elementary Students in Grades K-5</b>                  | Student demonstrates an acceptable level of performance on a state-approved reading/ English language arts alternative assessment | Student demonstrates an acceptable level of performance on a district-approved reading/ English language arts alternative assessment | Student demonstrates an acceptable level of performance on a district approved reading/English language arts alternative and/or math assessment |
| <b>All Elementary Students in Grade 3</b>                     | Student demonstrates an acceptable level of performance on a state-approved reading/ English language arts portfolio              | Grades K-2: Not applicable                                                                                                           | Grades 4-5: Not applicable                                                                                                                      |



|                                                                                        |                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                     |
|----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                        | assessment                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                     |
| <b>All Elementary Students in Grades K-5</b>                                           | Student has received intensive reading intervention and was previously retained in K-3 for a maximum total of two years, not to exceed one retention per grade level.                                   | Student has received intensive reading intervention and was previously retained in K-2 for a maximum total of two years, not to exceed one retention per grade level                                                                                                                                                                | Student has received intensive reading and/ or math intervention and was previously retained in K-5 for a maximum total of two years, not to exceed one retention per grade level.                                                                                                                                                  |
| <b>Select Elementary English Language Learner (ELL) Students in Grades K-5</b>         | Student with less than two years in the English for Speakers of Other Languages (ESOL) program                                                                                                          | Student with less than two years in the English for Speakers of Other Languages (ESOL) program                                                                                                                                                                                                                                      | Student with less than two years in the English for Speakers of Other Languages (ESOL) program                                                                                                                                                                                                                                      |
| <b>Select Elementary English Language Learner (ELL) Students in Grades K-2 and 4-5</b> | Not Applicable                                                                                                                                                                                          | Student with two or more years in the English for Speakers of Other Languages (ESOL) program cannot be retained solely due to lack of English proficiency. Retention requires the recommendation of an ELL committee                                                                                                                | Student with two or more years in the English for Speakers of Other Languages (ESOL) program cannot be retained solely due to lack of English proficiency. Retention requires the recommendation of an ELL committee                                                                                                                |
| <b>Select Elementary Students With Disabilities in Grades K-5</b>                      | Student with a disability whose Individual Education Plan (IEP) indicates participation in a statewide alternate assessment                                                                             | Student with a disability whose Individual Education Plan (IEP) indicates participation in a statewide alternate assessment                                                                                                                                                                                                         | Student with a disability whose Individual Education Plan (IEP) indicates participation in a statewide alternate assessment                                                                                                                                                                                                         |
| <b>Select Elementary Students with Disabilities in Grades K-2 and 4</b>                | Not Applicable                                                                                                                                                                                          | Student with a disability whose parent chooses to defer retention (maximum of one retention in K-5 unless parent requests additional retention).                                                                                                                                                                                    | Grade 4: Student with a disability whose parent chooses to defer retention (maximum of one retention in K-5 unless parent requests additional retention). Grade 5: Not Applicable                                                                                                                                                   |
| <b>Select Elementary Students With Disabilities in Grades 1-5</b>                      | Student with a disability participating in statewide assessment, has an Individual Education Plan (IEP) or a Section 504 Plan reflecting more than two years, and was previously retained in grades K-3 | GRADE K: Not Applicable GRADES 1-2: Student with a disability who participating in districtwide assessment, has an Individual Education Plan (IEP) or Section 504 Plan reflecting intensive remediation for more than two years, and was previously retained in grades K-2                                                          | Student with disability participating in statewide assessment, has an Individual Education Plan (IEP) or Section 504 Plan reflecting intensive remediation for more than two years, and was previously retained in grades K-5                                                                                                       |
| <b>All Elementary Students in Grades K-2 and 4-5</b>                                   | Not Applicable                                                                                                                                                                                          | Student receives intensive Tier 2 or Tier 3 intervention through the RtI process and demonstrates increased performance based on progress monitoring data (increase in student achievement to the level set by the goal of the intervention). Student will continue to receive intensive intervention in the subsequent grade level | Student receives intensive Tier 2 or Tier 3 intervention through the RtI process and demonstrates increased performance based on progress monitoring data (increase in student achievement to the level set by the goal of the intervention). Student will continue to receive intensive intervention in the subsequent grade level |
| <b>All Elementary Students in Grades K-2 and 4-5</b>                                   | Not Applicable                                                                                                                                                                                          | Student receives a Superintendent's Exemption from retention due to extraordinary circumstances                                                                                                                                                                                                                                     | Student receives a Superintendent's Exemption from retention due to extraordinary circumstances                                                                                                                                                                                                                                     |

\*<http://www.broward.k12.fl.us/sar/releases/briefs/PromotionRetention2013-14.pdf>

**3<sup>RD</sup> Grade-** Third grade students who according to the matrix is schedule to fail the grade, will be given the opportunity to attend Broward County's Third Grade Summer Reading Camp. Upon completion of the camp, if the student meets the criteria on the Broward County Assessment for Promotion (BCAP), they may be promoted to the fourth grade. Promotion may also be granted via alternative assessments and/or portfolio in compliance with requirements outlined by the Sponsor.

**Accelerated Achievement-** As per SB Policy 6000.1, in the case of accelerated student achievement, a student mid- or full year promotion may take place at any time during the school year.

**English Language Learners** - Promotion for an ELL student and an ELL student with disabilities is to be based on the student's performance in the dominant language while the student is in the process of becoming independent in English. Retention of an ELL student requires the review and recommendation of the ELL committee. Retention of a student with disabilities who is also ELL requires the review and recommendation of the IEP team. ELL students cannot be retained solely due to lack of proficiency in English.

**ESE Students** - A student who is enrolled in ESE must meet the District's performance standards, unless the IEP specifies that the student is unable to meet the grade-level performance standards, because:

- ❖ The student's demonstrated cognitive ability and/or behavior prevent the student from completing required classwork and achieving the Florida Standards, even with appropriate and allowable classwork modifications.
- ❖ The student is unable to apply or use academic skills at a minimal competency level in the home or community.

When an ESE-eligible student is determined to be performing below grade level in reading, writing, mathematics, and/or science, the IEP Team may be convened to review the IEP. The student's IEP must address all of the student's educational needs, including the student's below-grade-level performance. The IEP Team may recommend a PMP to address the student's educational need in reading, writing, mathematics, and/or science.

Students enrolled in an ESE program(s) may be considered to have met promotion requirements when he/she has achieved the goals that are specified on the student's IEP. The primary responsibility for determining each student's level of performance is that of the special program teacher and the general education teacher. The principal may (upon recommendation of the instructional staff and agreement of the IEP Team) determine that the promotion requirements have been satisfied.

**C. If the school will serve high school students, describe the methods used to determine if a student has satisfied the requirements specified in section 1003.428, F.S., and any proposed additional requirements. N/A**

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

Pre- and post-testing in Year 1, as well as reports from previous school records will be collected as baseline to measure progress in Years 1, 2, 3, and beyond, and as an integral part of the planning and refinement of instructional strategies.

Baseline data will include standardized test scores, report card grades, attendance reports, behavioral records, and IEP /EP and or LEP Plans (as applicable). This data will be compared to data at the end of each school year.

Based on the school's philosophy of providing "personalized instruction," the school will use data (state and district requirements, report cards, testing scores, past performance and comportment) as factors for placement in the appropriate classes which best suit each child. Ongoing internal audits (progress reports and report cards) of student performance, including beginning of the year, mid-year, and end of year assessments, will be utilized as reflective and guidance tools for course placement.

Student records from previous schools will be secured and reviewed for baseline data on each student and assessment of their progress. That data may include, but is not limited to, standardized test scores, report card grades, attendance records, and behavioral records (including in school and out of school suspensions as well as exemplary behavior). In the case of students with exceptionalities, IEPs will be secured as well as ELLSEP ELL/LEP Student Plans will be obtained for English Language Learners (ELL). This data will be made available to teachers and parents who will assess progress against the baseline data and provide appropriate services to successfully attain master of the Florida Standards.

The baseline data will be compared to current data at the end of each school year. Expectations are that students will progress at least as well as they did before attending the charter school, and that the specific measurable objectives for the school are achieved. Other methods of assessing students' mastery of performance outcomes will include, but will not be limited to, facilitator observation, peer- and self-evaluations, teacher tests and quizzes, projects, presentations, exhibitions, portfolios, and attendance rates. The student portfolios will show not only the student's "best" work, but also drafts of student work that demonstrate progress.

For each student who does not meet state performance levels in reading, writing, mathematics, and/or science, the school, in consultation with the student's parent, will implement a school-wide Pupil Monitoring Plan (PMP) to assist the student in meeting expectations for proficiency.

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

Students at the School will participate in all Statewide and District assessment programs and will use the state standardized assessment scores, district assessment scores and school-based assessments to measure student progress toward mastery of the NGSSS and/or Florida Standards, as applicable, at all grade levels. The School will abide by the Sponsor's annual testing calendar. The assessments to be administered include *but are not limited to*:

- ❖ Florida Kindergarten Readiness Screener (FLKRS)
- ❖ Florida Assessment For Instruction In Reading-Florida Standards (FAIR-FS) AP1
- ❖ District Writing Prompt(s)
- ❖ District Benchmark Assessment of Florida Standards (BAFS)\* as needed
- ❖ Florida Assessment For Instruction In Reading-Florida Standards (FAIR-FS) AP2
- ❖ Primary Reading Mid-Year Assessment (grades 1 & 2)
- ❖ Florida Alternate Assessment Administration (ESE)
- ❖ NAEP (select schools), grade 4
- ❖ Portfolio Assessment Reading Comprehension, grade 3 (Alternative Assessment for Promotion)
- ❖ FSA Writing grades 4-5\* or other state mandated assessment test in writing
- ❖ Cognitive Abilities Test (CogAT) grades 2 & 3
- ❖ Florida Assessment For Instruction In Reading-Florida Standards (FAIR-FS)AP3
- ❖ Stanford Achievement Test – tenth edition (SAT-10) Reading Comprehension, grade 3 alternate for promotion
- ❖ Comprehensive English Language Learning Assessment (CELLA)
- ❖ Primary Reading and Mathematics End-Of-Year Assessment (grades 1 & 2)
- ❖ Oral Language Proficiency Test I (IPT-I) 2nd Edition – Grades K – 5
- ❖ FSA or other Standards-based assessment to be approved by the FLDOE

FAIR-FS assessments will be administered three times per year to provide an ongoing measure of reading fluency and comprehension, a prediction of FSA performance, and serve as a progress monitoring device for teachers and students. English Language Learners will be assessed and served by ESOL-certified personnel and in accordance with the Sponsor's ELL Plan and the requirements of the *LULAC et.al. vs. State Board of Education Consent Decree (1990)*. Further information on the assessments for ELL students is detailed in Section 7 of this application.

Additionally, the School will use a variety of other assessments, such as teacher-made tests, textbook exams, alternate assessments, pre-and post-assessments, benchmark tests, midterm and final exams, etc. as needed to monitor student progress. The School may also choose to purchase research-based assessments such as STAR Reader and others.

As stakeholders in the educational process, students and their parents/guardians will be an active part of the assessment program. The School will develop a testing calendar aligned to the School's Scope and Sequence plans which will be posted throughout the school, published on the School's website, and sent home. Additionally, the School will encourage and promote positive test prep strategies such as eating a balanced breakfast and getting at least eight full hours of sleep. Following the release of assessment results, school personnel will disseminate the information to parents/guardians and engage students in data chats. A data chat serves as an effective

instructional tool because it allows the student to see where exactly he/she made progress and where improvement is still needed, resulting in increased motivation and understanding.

**School-Based Assessments in all Courses:**

- ❖ Weekly teacher-generated quizzes (K-5)
- ❖ Bi-monthly teacher-generated chapter tests (K-5)
- ❖ Quarterly projects and/or investigations based on focus lessons (K-5)
- ❖ Midyear and End of Year Examinations (K-5)
- ❖ Portfolios and presentations (K-5)
- ❖ Class participation rubrics (K-5)

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

Administrators and faculty collaboratively will develop an instructional calendar with a timeline for addressing targeted strands as denoted in the assessed standards. The calendar will reflect item specification formats and the percentage of students who attained proficiency during prior year assessment. Through the use of the calendar, student assessment data will drive decisions for continuous improvement of the teaching and learning process. Data will be used to understand and improve school effectiveness by targeting those standards, which indicated student need.

The School Instructional Leadership team—consisting of the principal, assistant principal, grade level chairs, ESE and ESOL teachers, Literacy Specialist and Media Specialist—will monitor and analyze data to maintain a problem solving system that brings out the best in the School, its teachers, and its students. The leadership team will meet weekly to:

- ❖ Evaluate data and use its implications to direct instructional decisions;
- ❖ Review progress-monitoring data at the grade level and classroom level to identify students and their academic levels;
- ❖ Identify professional development needs to enhance student achievement levels;
- ❖ Collaborate regularly, problem solve, share effective practices, evaluate implementation, make decisions, and practice new programs and skills;
- ❖ Facilitate the process of building consensus, increasing infrastructure, and making decisions about implementation.

Grade level chairs will communicate with teachers to determine the areas of students' strengths and weaknesses as demonstrated by class work assignments and assessment results. Each teacher will use data to determine the instructional focus of whole group lessons. Item analysis of assessments will be used to re-teach topics students missed most frequently. The lowest 30% of students and/or students referred by teachers will be targeted for morning tutoring, and pull-out or push-in intervention as needed.

Students at and above mastery level will be challenged through the use of additional hands-on investigations, projects and research assignments that will reinforce the mastery of standards while encouraging students to excel beyond them.

The School will also utilize a Response to Intervention (RtI) model that integrates assessment and intervention within a multi-level prevention system to maximize student achievement and to reduce behavior problems. The school will identify students at risk for poor learning outcomes, monitor student progress, provide evidence-based interventions and adjust the intensity and nature of those interventions depending on a student's responsiveness, and identify students with learning disabilities or other disabilities. The RtI implementation at the school will contribute to more meaningful identification of learning/behavioral problems, improve instructional quality, provide all students with the best opportunities to succeed at the school, and assist with the identification of learning disabilities and other disabilities.

The RtI model at the school will have four essential components: A school-wide, multi-level instructional and behavioral system for preventing school failure, screening, progress monitoring, data-based decision making for instruction and movement within the multi-level system. Regardless of the number of interventions the school implements, each will be classified under one of the three levels of prevention: primary, secondary, or tertiary. This will allow for a common understanding across the entire process.

#### **Student Assessment and Instructional Intervention**

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

#### **Multi-level Prevention System**

The model being employed by the school is a rigorous prevention system that provides for the early identification of learning and behavioral challenges and timely intervention for students who are at risk for long-term learning and/or behavioral problems. This system includes three levels of intensity or three levels of prevention, which represent a continuum of supports. The school may use more than one intervention within a given level of prevention. These levels of intervention will be as follows:

1. **Primary prevention:** high quality core instruction that meets the needs of most students
2. **Secondary prevention:** evidence-based intervention(s) of moderate intensity that addresses the learning or behavioral challenges of most at-risk students
3. **Tertiary prevention:** individualized intervention(s) of increased intensity for students who show minimal response to secondary prevention

#### **Identification of Students at Risk for Poor Learning Outcomes of Behavior**

Struggling students will be identified by implementing a 2-stage screening process. The first stage, universal screening, is a brief assessment for all students conducted at the beginning of the school year; for students who score below the cut-off point on the universal assessment (summative assessment), a second stage of screening is then conducted to more accurately predict which

students are truly at risk for poor learning outcomes. This second stage involves additional, more in-depth testing or short-term progress monitoring to confirm a student's at risk status. The tools utilized for the screening will mirror those used by the Sponsor district.

### **Researched Based Interventions**

Classroom instructors will use research-based curricula in all subjects. When a student is identified via screening as requiring additional intervention, evidence-based interventions of moderate intensity will be provided. These interventions are in addition to the core primary instruction and will typically involve small-group instruction to address specific identified problems. These evidenced-based interventions are well defined in terms of duration, frequency, and length of sessions. Students who show minimal response to secondary prevention move to tertiary prevention, where more intensive and individualized supports are provided. All instructional and behavioral interventions will be selected with attention to their evidence of effectiveness.

### **Adjustment to Interventions**

Progress monitoring data will be used to determine when a student has or has not responded to instruction at any level of the prevention system. For a student who has not responded to the intervention, increasing of the intervention will take place. This will be accomplished by lengthening instructional time, increasing the frequency of instructional sessions, reducing the size of the instructional group, or adjusting the level of instruction. The intervention may also be increased by providing intervention support from a teacher with more experience and skill in teaching students with learning or behavioral difficulties. Some students may be provided a Secondary prevention by the school. That may typically involve small-group instruction that relies on evidence-based interventions that specify the instructional procedures, duration and frequency of instruction.

### **Tertiary Intervention**

This will be the most intensive of the three levels and the school will individualize and target each student's area(s) of need. At this level, the teacher will begin with a more intensive version of the intervention program used in secondary prevention (e.g., longer sessions, smaller group size, more frequent sessions). The teacher will conduct frequent progress monitoring (i.e., at least weekly) with each student. When the progress monitoring data indicates the student's rate of progress is unlikely to achieve the established learning goal, the teacher will engage in a problem-solving process. The teacher modifies the components of the intervention program and continues to employ frequent progress monitoring to evaluate which components will enhance the rate of student learning. By continually monitoring and modifying (as needed) each student's program, the teacher is able to design an effective, individualized instructional program.

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

The School will participate in all applicable components of the statewide and district assessments, along with other age-appropriate tests that may be required or recommended by the Sponsor. In accordance with our mission, students will have an active role in their education by learning to

monitor and evaluate their work. Student and Parent Reports received from the FL-DOE will be sent to parents and shared with students in planning student's academic program and services for the following school year. Teachers will use assessment rubrics as teaching tools in the classroom by helping students to interpret their performance and comprehend their results.

If a child's performance is below target not making adequate progress towards the Common Core State Standards, the parent/guardian will be advised in a special conference and remedial strategies will be communicated.

If a child's performance is on target for his or her immediate stage of development, we will advise the parent. Assessment and performance information will be shared with parents and evidenced by parental contact logs for every teacher.

If a child's performance is above target for his immediate stage of development, the school may recommend to the parent advanced level placement/high achieving course work and screen for ESE (Gifted).

Not later than midway between marking periods, an interim report shall be sent to parents of students who are experiencing difficulty including, but not limited to, the following: failing, a drop of two or more grades, unacceptable behavior and excessive absences. In schools with an automated system for record keeping and grading, interims will be provided for all students. Ongoing communication will occur through progress reports, report cards, parent/student conferences, and other forms of written and oral communication. Additionally, progress reports shall be signed by the parent and expected to be returned to the teacher. Conferencing will be a highly effective way to keep parents apprised of their child's progress in all grade levels.



## Section 6: Exceptional Students

- A. Please indicate the level of service that the school will provide to students with disabilities by selecting from the list below.**
- **The school will serve students with disabilities whose needs can be met in a regular classroom environment (at least 80% of instruction occurring in a class with non-disabled peers) with the provision of reasonable supplementary supports and services and/or modifications and accommodations.**

The School hereby agrees to adopt and implement the Sponsor's Special Policies and Procedures (SP&P) with respect to the ESE Plan, as amended from time to time. Special Education students will be provided with programs implemented in accordance with federal, state, and local policies. The School will serve students with disabilities whose needs can be met in a regular classroom environment (at least 80% of instruction occurring in a class with non-disabled peers) with the provision of required supplementary supports and services and/or modifications and accommodations.

Students with disabilities enrolled in the School will be educated in the least restrictive environment and will be separated from non-disabled peers only if the nature and severity of the disability is such that education in general education classes with the use of supplementary aids and services cannot be achieved satisfactorily. The School will provide a continuum of support from consultation on in a collaborative setting, as appropriate, wherein the ESE Specialist and General Education teacher regularly monitor students' progress on attaining goals stated on the IEP as well as grade-level curriculum goals.

Highly qualified personnel will ensure that students' needs are being met even before student is identified or evaluated for Exceptional Education Services through a Response to Intervention (RtI) process, wherein interventions will be frontloaded in the general education classroom as a preventative measure, ensuring students are provided with the support they need to learn. The RtI framework will be a comprehensive support to students. The goal of the RtI model at the School is to minimize the risk of long-term negative learning outcomes by responding quickly and efficiently to documented learning or behavioral problems and ensuring appropriate identification of students with disabilities. This first step is to provide students with adequate resources in order for them to achieve their maximum potential in the classroom.

At the School, the range of services will include consultation in academic, behavior, social, speech/language and independent functioning. In addition, specialized instruction in any of the areas of academic, behavior, social, speech/language and independent functioning. Related services will address behavior/social/emotional needs serviced by mental health counselors and communication needs serviced by speech pathologist. Exceptional Student Education (ESE) teacher services consultations, specialized instruction in academic, behavior, social and independent functioning.

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

The School will not discriminate on the basis of race, religion, or national or ethnic origin, or exceptionality in the admission of students. Any eligible student who submits a timely application and whose parents accept the conditions of the Parental Involvement Contract shall be considered, unless the number of applications exceeds the capacity of the program, class, grade level, or building. The School will be open to any student residing in the County, provided the parent/guardian submits the Student Application Form. The Student Application Form does not inquire about or require parents/guardians to disclose whether or not their child has a disability and/or an IEP or 504 Plan. In accordance with the law, preferences may be given to applicants based on F.S. 1002.33(10)(d). The School will have an open admissions procedure, utilizing a "first come, first served" policy as required by statute, unless the number of applicants exceeds capacity. In such case, all applicants shall have an equal chance of being admitted through a random selection process conducted by the School's accounting firm in conformity with Florida's Charter School Legislation and in accordance with the racial/ethnic balance provisions described in F.S. 1002.33(7)(a)(8). All students in the lottery will be assigned a waiting list number should student seats become available or capacity increases.

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

The School hereby agrees to adopt and implement the Broward County Public Schools' Special Policies and Procedures (SP&P) with respect to the Special Education, as amended from time to time. Teachers and ESE personnel will participate in District workshops and monthly District ESE Specialist meetings. Data regarding students' IEPs will be entered into TERMS, if applicable, and the School will utilize the EasyIEP platform, consistent with the District's use, in order to facilitate communication between and compliance with SBBC's systems. It is the School's mission to place students in an environment in which they can develop to their highest potential; those students whose needs cannot be adequately addressed at the School will be appropriately referred, and staff will work together with the Sponsor's personnel to ensure that the needs of these students are met.

Operating under the auspices of the Sponsor as the Local Education Agency (LEA), the School will assume responsibility for programming and delivering related services to exceptional students, as identified in the student's IEP with adherence and fidelity to the Sponsor's policies, and with provisions further detailed in the paragraph that follows. The School does acknowledge a need for a collaborative linkage with the Sponsor, especially with respect to the responsibilities that exist for providing a free appropriate public education to children with disabilities.

**Least Restrictive Environment:** Students with disabilities will be educated in the least restrictive environment and will be separated from non-disabled peers only if the nature and severity of the

disability is such that education in regular classes, with the use of supplementary aids and services, cannot be achieved satisfactorily.

The School will utilize the Sponsor's policies and procedures with respect to serving students with disabilities, including the procedures for identifying students with special needs, developing Individualized Education Plans, and 504 Plans (as applicable), and providing a full range of services. Special Education students will be provided with programs implemented in accordance with federal, state, and local policies (specifically, the Individuals with Disabilities Education Act (IDEA); Section 504 of the Rehabilitation Act of 1993; Sections 1000.05 and 1003.57, Florida Statutes; Chapter 96-186, Laws of Florida; and Chapter 6A-6 of the Florida Administrative Code. Additionally, the School will follow guidelines and procedures detailed in Broward County Public Schools' ESE Plan and Manuals. The educational program for exceptional students will include and adhere to the principles of the law as follows: ·

**Free appropriate public education (FAPE)** - will be provided to every exceptional student enrolled in the School. That is, free—at no cost to parents; appropriate—suited to individual needs of the child in accordance to the guidelines outlined in the student's IEP or 504 plan; public – provided by and paid for the public education system; education-complete educational program including extracurricular activities.

**Appropriate evaluation** – evaluations will occur within appropriate timeframes and in accordance with the Sponsor's published guidelines.

**Individual Education Plans (IEP)** - and Educational Plans (EP) for gifted will be developed and maintained and meetings will be held in accordance with Sponsor's guidelines.

**Parent/Student Participation in Decisions** – including but not limited to giving consent for evaluation and initial placement, helping design the IEP, helping the School understand their child.

**Procedural Due Process** – A Non-discriminatory policy regarding the eligibility, identification, location, placement and evaluation process as well as adherence to procedural guidelines for all of these and with integrity to FAPE will consistently be implemented. Notwithstanding, when in question, due process hearings may be initiated by a parent or the District on the proposal or refusal to initiate or change the identification, evaluation, or educational placement of the student or the provision of a free appropriate public education.

**Least Restrictive Environment: (LRE)** students with disabilities will be educated in the least restrictive environment and will be separated from non-disabled peers only if the nature and severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.

In accordance with the policies of Broward County Public Schools, the School will follow the Response to Intervention (RtI) process, including the following three (3) tiers of intervention that must be followed before psycho-educational evaluation can be recommended:

**Tier 1:** During this stage, students will be provided academic and/or behavioral support aimed at serving their needs. This stage supports all students and is conducted in the general education classroom, targeting the educational needs of each student via differentiated instruction and research-based instructional methods. Core academic interventions at this stage would include the use of the core curriculum and whole-class interventions. Core behavioral interventions would include school-wide discipline policies and procedures as well as positive behavior supports. Academic assessments at the Tier 1 level would include benchmark assessments; behavioral assessments would include discipline data. It is the intention of both the District and the School that Tier 1 of the RtI process would successfully address the needs of at least 80-90% of the population.

**Tier 2:** At this point in the process, students will be provided a variety of methods to target instruction that may include but not be limited to: small groups, one-on-one instruction, and twice a week pull-out tutoring. Assessments would include behavioral observations, intervention data and gap analysis, in accordance with District mandates. Tier 2 interventions would be initiated for the 10-15% of the student population that did not adequately respond to the interventions provided in the general education classroom during the Tier 1 intervention process.

**Tier 3:** During this stage, students will be provided with a more frequent, intense and individualized intervention, which can include but not be limited to: pull-out tutoring conducted three to five times a week, or one-on-one tutoring. Students who did not successfully respond to the Tier 1 and Tier 2 interventions would receive such interventions as a behavior intervention plan, individualized counseling, and intensive individualized academic plans, as well being assessed via Functional Behavioral Analyses (FBA), and the use of progress monitoring graphs, as applicable and in accordance with District mandates.

**Identifying Exceptional Education (ESE) Students** - The School will follow the School Board of Broward County's Special Programs and Procedures (SP&P) for Exceptional Students and Collaborative Problem Solving (CPS) and Comprehensive Evaluation. In accordance with the SP&P, the School will identify students as follows:

**Step 1:** Identify the problem with stakeholders (parents, teachers, staff, etc)

**Step 2:** Analyze the problem by reviewing at data that focuses on the student's learning and behavioral/social characteristics in the classroom.

**Step 3:** Select and implement the intervention targeted to address the student's needs.

**Step 4:** Progress monitor for a time period of at least 4-6 weeks to evaluate the effectiveness of intervention(s).

**Step 5:** If the aforementioned RtI process has been executed with fidelity and the student is not responding appropriately then the School will refer the student to SBBC's Psychological services for appropriate comprehensive evaluation.

**Step 6:** All stakeholders meet as a team to review and discuss the results of the comprehensive evaluation, and as a committee determine ESE eligibility for services. If there is a documented medical/physical condition affecting their performance in school, the student will first be considered for 504 Plan eligibility.

**Step 7:** Appropriate educational support is determined; IEP is developed for student.

**Individual Education Plans (IEPs):** The School will utilize all of the Sponsor's procedures and forms

related to IEP and placement procedures. The School will develop an Individual Education Plan (IEP) and conduct an annual IEP meeting with the required team. The School will invite the Sponsor to any and all staffings and IEP meetings, by giving at least two (2) weeks prior notice, with a copy of the Parent Participation Form, by mail or given in person. The school will support the education of the students within the regular classroom setting as the first choice of placement and with a commitment to provide services necessary for full implementation of the child's IEP.

Students will be guaranteed a free appropriate education through aforementioned identification and evaluation as well as consequent placement and implementation of an appropriate IEP. The written IEP for each student will include measurable annual goals. Supplementary aids and related services will also be identified as well as necessary accommodations and modifications which will be clearly delineated in this written plan.

The IEP will be implemented immediately following the receiving of parental consent, or 10 days after the meeting and will be made accessible to each of the student's teachers who are responsible for the implementation. Each teacher of the student will be notified of specific responsibilities related to implementing the student's IEP. The School will offer various services to meet student needs including, but not limited to: specialized instruction, collaboration, consultation, or support facilitation in the student's area of need. Other services may include social skills development, speech/language therapy, occupational therapy, physical therapy and/or counseling.

**The ESE Specialist** – Confirms that students have current assessment data and are receiving the types of support they need in general education. These may include:

- ❖ Ensuring proper reading placement.
- ❖ Reviewing all schedules prior to the start of the school year and making necessary changes.

**Procedural Safeguards** - Parents of students with disabilities will receive procedural guidelines and guidance in their native language. These will include the areas of notice and consent, independent educational evaluations, confidentiality of student records, due process hearings, and surrogate parents. As early as possible in the planning/development stages, School staff will work closely with the Sponsor's staff to discuss the needed services (including all related services and programs) of the enrolled students with disabilities.

Services will be regularly and routinely monitored through the School's ESE Specialist and ESE Teacher(s) to ensure that individual learning plans are being met. Similarly, all personnel who provide related services (e.g. psycho-social counseling provided by a Speech/Language Pathologist, Occupational Therapist, physical therapist, guidance counselor, social worker, mental health counselor, etc.) to students will meet all required licensure and/or certification requirements pertaining to their area of related service.

#### 504 Plan

The School's policies for 504 students will reflect the requirements of the Section 504 of the Americans with Disabilities Act of the Rehabilitation Act of 1973 that prohibits discrimination

against persons with disabilities in any program receiving federal financial assistance, including public schools. The purpose of Section 504 is to ensure that eligible students have educational opportunities equivalent to their non-disabled peers. It is often said that Section 504 “levels the playing field” for all students attending public school. Section 504 requires that accommodations, aids or special services be provided to students with disabilities so they have an opportunity, equal to non-disabled students, to participate in educational experiences.

Section 504 provides no funding and the eligible student’s education must be provided in the general education classroom, unless it is demonstrated that education in the regular environment, with the use of supplementary aids and services, cannot be achieved satisfactorily. Section 504 requires school districts to provide a Free Appropriate Public Education (FAPE) to qualified students who have a physical or mental impairment that substantially limits one or more major life activities.

After obtaining parental consent, the Section 504 Team collects data from a variety of sources, e.g., student records, standardized test scores, teacher reports, medical reports, behavioral rating scales, psycho-educational evaluations, grades, attendance. Unlike most IDEA evaluations, Section 504 evaluations do not necessarily involve formal testing.

Placement refers to regular and/or special education program in which a student receives educational and/or related services. For the vast majority of Section 504 students, “placement” refers to planned accommodations within the regular classroom. Students whose needs cannot be met in such a manner may require evaluation to determine eligibility for special education under IDEA. Once a plan is written, all staff in the school should view it as a “legal contract” to which they are parties.

Meetings will occur on an annual basis between the parents, classroom teacher, and the 504 team in order to assess student progress. 504/ADA plans will be revisited and reviewed annually. Reevaluation will take place every three years.

**Federal and State Reports:** Unless otherwise exempted by Chapter 1002, Florida Statutes, the School will complete federal, state and any other reports deemed necessary in accordance with the time-lines and specifications of the Sponsor and the State Department of Education.

**D. Describe how the school will utilize the regular school facilities and adapt them to the needs of exceptional students to the maximum extent appropriate, including the use of supplementary aids and services.**

The School will utilize school facilities to meet the needs of exceptional students by offering ramps, parking spaces, elevators, assistive technology, handicap bathroom stalls, resource rooms and any other options that are needed as decided by the IEP team. The School will also make adaptations to school facilities, to the maximum extent appropriate and within provisions of the law, to ensure students with disabilities enrolled in the School will be educated in the least restrictive environment and will be separated from non-disabled peers (pull- out) only if the nature and severity of the disability is such that education in regular classes, including the use of

supplementary aids and services, cannot be achieved satisfactorily. In addition, students will be offered specialized instruction, collaboration, consultation, or support facilitation depending on the student's area of need. Other services may include social skills development, speech/language therapy, occupational therapy, physical therapy and/or counseling.

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

The School's effectiveness in serving special education students can also be evaluated in its ability for the student to demonstrate learning gains consistent with the annual goals specified in the child's IEP. In addition, the Sponsor's annual ESE compliance will further measure the school's effectiveness to serve Exceptional Education Students. Furthermore, parents annually complete the Broward County ESE Parent Online Survey indicating how well schools are supporting parents' involvement in their child's education.

**F. Explain how exceptional students who enter the school below grade level will be engaged in and benefit from the curriculum.**

The School's curriculum is designed to serve students of all ability levels, and the School will ensure that all students will be engaged in and benefit from the curriculum, including exceptional students who enter the school below grade level. Any student in need of remediation for not making adequate progress towards mastery of the Florida Standards, when applicable, will have access to supervised study time and tutoring services during school and non-school hours (e.g. after school, Saturday mornings, etc. and whenever possible, to accelerate and/or remediate student achievement).

Apart from providing the specific services listed in a student's IEP, as applicable, the School's faculty will differentiate instruction as necessary, as well as offer tutoring services or other such assistance to ensure students' success. Student performance will be continuously assessed and students not making adequate progress towards mastery of the Florida Standards, as applicable, will be identified and the following measures will be instituted:

- ❖ Reading strategies in the content areas will be facilitated throughout the curriculum to provide students additional practice in addition to those taught during language arts classes.
- ❖ Early bird, Super Saturday, and additional daily pull-out tutoring may be required for those students consistently demonstrating non-mastery of the standards. The team will meet to discuss pull-out tutoring options.
- ❖ Students consistently demonstrating non-mastery of the Standards on teacher generated quizzes, chapter tests, projects, investigations, and poor academic progress will be targeted for supplemental and intensive instruction/intervention.



All students with disabilities will be monitored as stated on their IEP and progress reports will be sent to parents/guardians attached to the student's report card each quarter.

**G. Provide the school's projected population of students with disabilities and describe how the projection was made.**

The School will be nonsectarian in its programs, recruitment, admission policies and operations. The promotional plan to be followed in publicizing the School will be designed to reach the entire community and, accordingly, all groups within it. By publicizing the availability of the School throughout Broward County, the School's demographic composition should mirror that of the local community. Therefore, it is anticipated that the School may have approximately 12% population of students with disabilities will enroll at the School. The data was derived from the 2015 LEA Profile published by Florida Department of Education Bureau of Exceptional Education and Student Services [http://www.fl DOE.org/core/fileparse.php/7672/urlt/broward\\_2015.pdf](http://www.fl DOE.org/core/fileparse.php/7672/urlt/broward_2015.pdf)

**H. Identify the staffing plan, based on the above projection, for the school's special education program, including the number and qualifications of staff.**

The school teaching staff will include a certified ESE Program Specialist with demonstrated experience in providing support and services to children with disabilities. The ESE Specialist will be an employee of the School and will at a minimum possess full certification in special education. The ESE Specialist will ensure the implementation of all IEPs and will consult with the ESE teacher and general education teachers to provide direct instructional support to special education students. Consultation provided by the ESE Specialist and/or ESE Teacher will include:

- ❖ adjustments to the learning environment
- ❖ modifications of instructional methods
- ❖ the use of appropriate accommodations to meet the needs of individual students

Special Education teachers will be hired to service students with disabilities, in accordance with the level of support needed to implement the related services and specialized instruction detailed on the IEP (e.g. including, but not limited to, if applicable, Extended School Year (ESY) services for students needing specialized services as required by students IEP).

The School will employ teachers who meet all licensure and/or certification requirements that apply to the area in which the individuals are providing services to the special education students. The number of special education staff will be based on the number of students in the Special Education Program identified upon student enrollment.

Speech-language, occupational, and physical therapy services will be contracted services that the School may provide for students who qualify for those services. Similarly, all personnel who provide related services (e.g. mental health and academic counseling will be provided by a psychologist, social worker or mental health professional, etc.) to students will meet all required licensure and/or certification requirements pertaining to their area of related service.



## I. Describe how the school will serve gifted and talented students.

The School will serve the needs of gifted students in accordance with State Board Rule 6A-6.03019, FAC, *Special Instructional Programs for Students Who Are Gifted*, and current BCPS Exceptional Student Education Policies and Procedures (SP&P).

**Identification:** Gifted students will be identified for special instructional programs for the gifted if the student demonstrates the following:

- ❖ A need for a special program\*
- ❖ A majority of the characteristics of gifted students according to the Gifted Indicators Checklist
- ❖ Superior intellectual development measured by an intelligence quotient of two (2) standard deviations or more above the mean on an individually administered standardized test of intelligence

\*In order to provide a comprehensive profile of the student's abilities and needs, screening activities may include nomination forms from teachers, school staff, students themselves, parents and/or community or through the use of such assessments as Kaufman Brief Intelligence Test (K-BIT), Cognitive Abilities Test (CogAT) or other cognitive screening measure after proper consent for such an evaluation has been obtained. The following criteria may be used in identifying students:

- ❖ performance on standardized tests as determined below
- ❖ referrals from teachers for gifted eligibility based on classroom performance, student's portfolio
- ❖ recommendation from counselor/teachers regarding student motivational behavior, involvement in activities, etc.
- ❖ recommendation from parents about student's academic areas of strength
- ❖ K-BIT score of a minimum of  $\geq 113$
- ❖ CogAT score of a minimum of  $\geq 116$

Plan B gifted (which is the underrepresented minority, ELL/ESOL, Free reduced lunch) is in place if the student scores in the 80th percentile or above in reading or mathematics on a standardized achievement test or scores an average of 80% on at least four (4) of the nomination forms. Then, the student will be referred for screening of intellectual functioning.

**Services** - The School will choose the most intense model that can be financially supported by the size of the gifted population. The number of gifted students per grade level will determine the choice of models as follows:

**Gifted/High Achieving Full-time, Self-contained (for grades K-5 classes with < 20 gifted students per grade level or combination grade level):** All gifted students in a grade must be grouped together in one class for their academic subjects (in order to ensure that gifted students have time with their intellectual peers) and taught by a gifted endorsed teacher (or a teacher working towards gifted endorsement and on an approved out-of-field waiver). Students are ability grouped within the gifted classroom and the curriculum is even further differentiated based on individual student needs. High achieving students are determined by the following criteria:

- **Kindergarten:** School-based decision

- **Grades 1-3:** Scored the highest of grade-level students on a district-approved, school determined reading test (i.e., DAR, Rigby, IRI, etc.) given in the spring of the previous year. After the highest, the next highest, etc., would be placed until all seats are filled. In the event there is a tie, the student with the higher math score on a school-determined assessment will be given the seat.
- **Grades 4-5:** Scores at Level 5 in reading **AND** math on the most recent FCAT/FSA. If there are more level 5s than available seats, the scaled scores are added together and the students with the highest combined scores are given priority. If there are multiple students who have the same combined scaled scores, and not enough seats left to accommodate them, then their GPAs must be calculated. If there are still available seats after the students who scored a Level 5 in both reading and math have been placed, then the following combinations would be considered in order:
  - Level 5-Reading; Level 4-Math
  - Level 4-Reading, Level 5-Math
  - Level 4-Reading; Level 4-Math
  - Level 4-Reading; Level 3-Math

**OR**

**Half-day Resource (for grades K-5 classes with under 20 gifted students per grade level or combination grade level):**

- Gifted students will receive instruction in specific content area(s) for 2 1/2 hours per day. A minimum of 2 hours per day will be spent on content instruction.
- Students will be ability grouped within the gifted classroom and the curriculum is even further differentiated based on individual student needs.
- The gifted endorsed teacher will consult with the general education teacher on a weekly basis regarding gifted instruction and the individual needs of each gifted student.

If the School has enrolled less than 11 gifted students per grade level in grades k-3, then the School will use the Primary Elementary alternative Model.

**EP Plan Development:** Prior to identifying a student as gifted, the gifted coordinator will notify the student's parent/guardian, teachers, and school psychologist. The gifted coordinator at the School will fill out the appropriate forms provided by the District and notify the parent/guardian of the student to give permission for testing. Upon eligibility, at a mutually scheduled EP meeting, the participants will determine the best suitable services required to meet the student's educational needs. The Gifted Eligibility Matrix (GEM) will be utilized to evaluate placement in the gifted program. The Plan B Matrix will include measures of intellectual functioning, academic performance, leadership, motivation, and creativity through the following means. A multi-disciplinary committee of professionals will be established which will include a parent and may also be comprised of the classroom teacher, the teacher of the gifted, the Exceptional Student Education (ESE) Specialist, an LEA representative, the school psychologist, an ESOL designee where appropriate, and other school staff who spend significant time with the student. The eligibility committee at the School will be responsible for the review and analysis of evaluation data and the recording of the data on the Gifted Eligibility Matrix (GEM).

**Initial Educational Plan (EP) Team Participants:** The EP team will include the following participants:

- ❖ The student's parents/guardians\*
- ❖ The student
- ❖ The Schools' gifted coordinator
- ❖ At least one teacher of the gifted program
- ❖ One regular education teacher of the student who, to the extent appropriate, is involved in the development and review of the student's EP. Involvement may be the provision of written documentation of a student's strengths and needs.
- ❖ School psychologist
- ❖ Staffing Specialist

\*Parents/Guardians will be considered partners with the School in developing, reviewing, and revising the educational plan (EP) for their child. The role of parents/guardians in developing EPs will include:

- ❖ Providing critical information regarding the strengths of their child;
- ❖ Expressing their concerns for enhancing the education of their child so that they receive a free appropriate public education;
- ❖ Participating in discussions about the child's need for specially designed instruction;
- ❖ Participating in deciding how the child will be involved and progress in the general curriculum;
  - Participating in the determination of what services the School will provide to the child and in what setting.

**The Educational Plan (EP)** for each student will be individualized, measurable, and observable. The plan will include a statement of the student's present levels of performance which may include, but is not limited to, the student's strengths and interests, the student's needs beyond the general curriculum, results of the student's performance on state and district assessments, and evaluation results;

1. A statement of goals, including benchmarks or short term objectives;
2. A statement of the specially designed instruction to be provided to the student;
3. A statement of how the student's progress toward the goals will be measured and reported to parents/guardians;
4. The projected date for the beginning of services, as well as the anticipated frequency, location, and duration of those services;

**Implementation:** The EP will be implemented immediately following parental consent after the meeting and will be made accessible to each of the student's teachers who are responsible for its execution, and each teacher will be notified of specific responsibilities related to it.

**Services and Instructional Strategies for Gifted -** The School will offer various services to meet the needs of the gifted student based on the Educational Plan. These services may include but are not limited to:

- ❖ specialized gifted courses (as detailed in the curriculum section of this application),
- ❖ acceleration
- ❖ ability grouping

- ❖ modifications of content through differentiated curriculum
- ❖ career exploration and goal setting integrated into the curriculum
- ❖ curriculum compacting
- ❖ enrichment
- ❖ social skills development and/or counseling
- ❖ real world immersion activities (i.e. science and social studies fairs, music and art exhibits, academic competitions, mentoring)

Curriculum will be vertically and horizontally enriching, providing those students who have mastered the grade-level Florida Standards, when applicable, opportunities for acceleration. Curriculum for gifted students should include a wealth of opportunities for extended learning beyond the classroom.

**Evaluations** - A consultation model will be established by the gifted coordinator at the school. Consultation will include periodical meetings between the general education teachers, gifted teachers and gifted coordinator to plan, implement, and monitor the student's progress. All faculty providing consultation to the student will maintain a record of the teachers, courses, and students for whom the services are being provided.

The EP team shall consider the strengths of the student and needs resulting from the student's giftedness and the results of recent evaluations, including class work and state assessments. In the case of a student with limited English proficiency, the language needs of the student as they relate to the EP, will be considered when reviewing and revising the plan. Quarterly Progress reports are also sent home in addition to parent contact.

Educational Plan (EP) Review Team Participants: The EP review team will include but is not limited to the following participants:

- ❖ The student's parents/guardians
- ❖ The student
- ❖ At least one teacher of the gifted program
- ❖ General Education teacher
- ❖ At the discretion of the parent or the school district, other individuals who have knowledge or special expertise regarding the student.

**Timelines:** An EP will be in effect at the beginning of each school year for all gifted students for a duration of 1 or 2 years as applicable to each case. Timelines for EP meetings for students who are gifted shall include the following: **1)** An EP will be developed within thirty (30) calendar days following the determination of eligibility for specially designed instruction. **2)** Meetings may be held to develop and revise the EP at least every 1 or 2 years for students. Plans may be reviewed earlier as needed or if the student's parent/guardian or teacher requests a review, or if services change.

## Section 7: English Language Learners

### A. Describe how the school will comply with state and federal requirements for serving English language learners, including the procedures that will be utilized for identifying such students and providing support services.

The School hereby agrees to adopt and implement the Sponsor's ELL plan, policies and procedures with respect to the ELL Plan, as amended from time to time. Additionally, the School will meet the requirements of the Consent Decree entered in *Lulac, et al. vs. State Board of Education* and all applicable provisions of Federal law relating to students who are limited English proficient. English Language Learners enrolled at the school, will be served by ESOL-certified personnel who will follow the Sponsor's District Plan for English Language Learners as follows:

**Identification and Assessment:** Per FS 1003.56, the School will identify "English Language Learner" (ELL) as:

1. An individual who was not born in the United States and whose native language is a language other than English;
2. An individual who comes from a home environment where a language other than English is spoken in the home; or
3. An individual who is an American Indian or Alaskan native and who comes from an environment where a language other than English has had a significant impact on his or her level of English language proficiency

The school will survey ALL parents upon initial entry (registration) using the **Home Language Survey (HLS)**. This is required by the *League of United Latin American Citizens (LULAC) et al. v. State Board of Education* Consent Decree. The Home Language Survey includes three questions and is given at the time of registration. The questions are as follows:

1. Is a language other than English used in the home?
2. Did the student have a first language other than English?
3. Does the student most frequently speak a language other than English?

If a parent answers "yes" to one or more of the three HLS questions, and/or meets the definition of ELL, they will be advised that the student will need an aural/oral language assessment of English proficiency to determine eligibility and placement in the school's ESOL Program. The parents are informed orally of the need of a language assessment by the school registrar, ESOL contact/designee, or by the guidance counselor. The student is then referred to a trained language assessor at the school.

The student is assessed for English aural/oral language proficiency with the IPT within 20 days of registration, using the following assessment instrument:

IDEA Oral Language Proficiency Test I (IPT-I) Form G  
Kaufman Test of Educational Achievement II Brief Form (KTEA-II)

1. If the student is classified A1-B2, the school will update the language classification on TERMS and the ELLSEP folder. All decisions regarding ELL programmatic assessment and academic placement will be documented in the appropriate section of the student's English Language Learner Student Educational Plan (ELLSEP) folder. Parents will be notified of placement within 20 days in the home language.
2. ELLs in grades 3-5 who score Fluent English Speaker on the IDEA Oral Language Proficiency Test are administered the Kaufman Test of Educational Achievement II Brief Form (KTEA-II) as part of the entry requirements into the ESOL program. This test generates Reading and Writing scores and can be used to determine reading achievement.
3. In addition, ELLs are administered the *Comprehensive English Language Learning Assessment (CELLA)*, which contains a separate reading section to qualify for exit of ESOL.

Once the student is assessed with an aural/oral language assessment instrument, the school will use the charts correlating the *IDEA Oral Language Proficiency Test Score Levels with Broward County Language Level* to determine appropriate placement.

**The ELL Committee** – The main function of the ELL Committee is to resolve any issue that affects the instructional program of an ELL student. It is composed of at least 4 members: an administrator or designee, the ESOL teacher, the home language teacher (if any), the classroom/subject area teacher(s), plus guidance counselors, school social workers, school psychologists or other educators as appropriate for the situation. The parent(s) will be invited in writing in home language to attend any meeting of the ELL Committee.

**The Individual ELL Student Education Plan:** All students classified as ELL will have an Individual ELL Student Plan. Such plan is part of the permanent student cumulative record folder upon entry into the ESOL program. The plan will include biographical student information (name, grade, home language), initial assessment and placement data, ESOL program and update information, program participation, amount of instructional time and/or schedule, exit information, post program review, etc. The plan will be updated on an ongoing basis to include programmatic changes, assessments, level updating, and ELL committee meeting information.

The ELL Plan will:

- ❖ Inform the student, parent, and teachers on the student ESOL language level
- ❖ Monitor student progression
- ❖ Establish meetings between the school, the parents, and the student to discuss academic progress
- ❖ Provide methods for evaluation and provisions for monitoring and reporting student progress
- ❖ Provide for parental and teacher involvement to ensure that the students are being properly serviced
- ❖ Provide for student exit from and reclassification into the program.

The School will designate an ESOL coordinator to be responsible for developing and updating all

Student ELL Plans, keeping a record of parental contact and ESOL Program Records Folder.

**Evaluation** - Student plans will be updated at minimum annually by the program coordinator. The ESOL coordinator will document former ELL student's progress in the student's ELL Student Plan using a Post-Program Review Report and a Post-Program Review Student Profile. These are generated with information regarding students who have exited the ESOL program within the last two years. Documentation of the progress review for each ESOL-exited student will be conducted at the end of the student's first grading period, first semester, first year, and second year after exiting. The school will monitor the student's progress using report cards, test scores, classroom performance, Post Program Review Reports (as applicable), Standardized tests and Student Case Management referrals (as applicable).

Additionally, students who are in the program longer than 4 years may have a plan update twice a year, depending upon their date of entry into an ELL program.

**ESOL Program Placement** - The school will implement an ESOL program of instruction in meeting the needs of the ELL population to be served. Program instruction will be designed to develop the student's mastery of the four language skills, including listening, speaking, reading, and writing, as rapidly as possible. The School will provide ESOL instruction in English and ESOL instruction (or home language instruction) in the basic subject areas of reading, mathematics, science, social studies, and computer literacy following the guidelines and procedures outlined by the current District ELL Plan. ELLs in grades 3-5 who score Fluent English Speaker on the IDEA Oral Language Proficiency Test are administered the Kaufman Test of Educational Achievement II Brief Form (KTEA-II) as part of the entry requirements into the ESOL program. This test generates Reading and Writing scores and can be used to determine reading achievement. In addition, ELLs are administered the Comprehensive English Language Learning Assessment (CELLA), which contains a separate reading section.

English Language Learners will receive instruction, which is comprehensible, equal and comparable in amount, scope, sequence and quality to the instruction provided to English proficient students. A variety of symbolic and concrete referents to illustrate meaning will be used in the classroom and contextual support in the form of hands-on activities and visuals will be used to not only instruct but gauge progress. Teachers will plan lessons that incorporate language development by:

- ❖ offering many opportunities for students to listen, speak, read and write;
- ❖ using cooperative activities;
- ❖ creating an environment where students are engaged in meaningful, comprehensive, and useful language activities;
- ❖ aligning the lessons with Sunshine State Standards and documenting benchmarks as required by the state;
- ❖ focusing on critical thinking and problem-solving skills;
- ❖ providing opportunities for active participation in the learning process.

Administrators will be responsible for monitoring the implementation of strategies by the classroom teacher using classroom walk-through model. Evidence can be observed during

classroom visits, through lesson plans, through use of materials and audiovisuals, and through grade book notations. All teachers of ELLs document the ESOL strategies used for each lesson in their plan book.

Some of the ELL Strategies to assist ELLs include but are not limited to Marzano's High Yield Strategies:

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u><i>Identifying Similarities and Differences</i></u><br>Mind mapping<br>Venn diagrams<br>T Charts<br>Cause and Effect Organizers<br>Word Sort<br><u><i>Cooperative Learning</i></u><br>Group Projects<br>Language Experience Approach<br>Shared Reading and Writing<br>Book Pass<br>Dramatization<br><u><i>Nonlinguistic Representations</i></u><br>Pictures<br>Manipulatives<br>Reflective journals<br>Sharing goals and objectives with parents<br>Praise efforts to use English | Concept Maps<br>Student Drawings<br>Mnemonic Clues<br>Visualization<br>5 Senses Organizer<br><u><i>Questions-Cues-Advanced Organizers</i></u><br>Activate background knowledge<br>Frontload key vocabulary<br>Predicting, inferencing, concluding<br>Reciprocal teaching and modeling<br>Think alouds and guided questions<br>KWL<br><u><i>Homework and Practice</i></u><br>Lesson opening with review and preview.<br>Metacognition of strengths and weaknesses.<br>Hold high expectations<br>Honor individual learning styles<br>Use authentic assessment |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|



The school will also utilize strategies approved by BCPS as noted on the *ESOL Instructional Strategies Matrix* as seen below:

**ESOL Instructional Strategies Matrix**  
(How We Teach is as Important as *What* We Teach)

| A                                                                                                                                                                                                                                                                                                                                                                                                                                         | B                                                                                                                                                                                                                                                                                                                                                                               | C                                                                                                                                                                                                                                                                                                                              | D                                                                                                                                                                                                                                                                                                                                                            | E                                                                                                                                                                                                                                                                                                                                                                                                                                | F                                                                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Accommodations                                                                                                                                                                                                                                                                                                                                                                                                                            | Clear Communication                                                                                                                                                                                                                                                                                                                                                             | Assessments                                                                                                                                                                                                                                                                                                                    | Vocabulary                                                                                                                                                                                                                                                                                                                                                   | Collaboration & Conversation                                                                                                                                                                                                                                                                                                                                                                                                     | Metacognitive & Metalinguistic                                                                                                                                     |
| A1 Heritage Dictionary<br>A2 Heritage Language (L1) Support<br>A3 Flexible Scheduling<br>A4 Flexible Setting<br>A5 Flexible Timing                                                                                                                                                                                                                                                                                                        | B1 Concise Language<br>B2 Clear Directions<br>B3 Enunciation<br>B4 Pauses & Pacing<br>B5 Pointing<br>B6 Repeating/Paraphrasing<br>B7 Gestures<br>B8 Show Examples & Non-Examples<br>B9 Demonstrations<br>B10 Anecdote/Storytelling                                                                                                                                              | C1 Rubrics<br>C2 Presentation<br>C3 Portfolio<br>C4 Checklist<br>C5 Labeling<br>C6 Interview<br>C7 Response Cards<br>C8 Oral Assessment<br>C9 Observation<br>C10 Context-Embedded Text<br>C11 Voting Devices<br>C12 Cloze Test<br>C13 Visual Representations<br>C14 Self/Peer Assessment<br>C15 Samples<br>C16 Sentence Frames | D1 Etymology/Cognates<br>D2 Semantic Feature Analysis<br>D3 Context Clues<br>D4 Tier II/Tier III Analysis<br>D5 Interactive Word Walls<br>D6 Vocabulary Games<br>D7 Multiple Meanings<br>D8 Phonology<br>D9 Vocabulary Banks                                                                                                                                 | <b>Grouping Configurations:</b><br>E1 Heterogeneous Grouping (Language/Content Readiness; Learner Profiles; Interests)<br>E2 Homogeneous Grouping (Language/Content Readiness; Learner Profiles; Interests)<br>E3 Jigsaw<br>E4 Peer Pair<br>E5 Reader's Theater<br>E6 Think/Pair/Share<br>E7 Academic Games<br>E8 Group Presentations/Projects<br>E9 Socratic Seminar<br>E10 Panel Discussion<br>E11 Debate/Defend with Evidence | F1 L1 Transfer<br>F2 Mnemonic Devices<br>F3 Dialogue Journals<br>F4 Self-Correction<br>F5 Self-Evaluation<br>F6 Self-Monitor<br>F7 Peer Editing<br>F8 Associations |
| G                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                | H                                                                                                                                                                                                                                                                                                                                                            | I                                                                                                                                                                                                                                                                                                                                                                                                                                | J                                                                                                                                                                  |
| Context Embedded Supports & Close Reading                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                | Multimodal & Multimedia                                                                                                                                                                                                                                                                                                                                      | Advance Organizers                                                                                                                                                                                                                                                                                                                                                                                                               | Additional Resources                                                                                                                                               |
| G1 Activating and/or Building Prior Knowledge<br>G2 Chunking Text<br>G3 Annotations & Symbols<br>G4 Ask Inferential & HOT Questions<br>G5 Ask Clarifying Questions<br>G6 Modeling<br>G7 Read Aloud<br>G8 Think Aloud<br>G9 Multimodal Texts<br>G10 Visualization/Illustrations<br>G11 Summarizing<br>G12 Dramatic Enactments/Role Play<br>G13 Identify Key Concepts<br>G14 Similarities & Differences<br>G15 Language Experience Approach | G16 Note-Taking/Outline Notes<br>G17 Question-Answer-Relationship (QAR)<br>G18 Reading with Specific Purpose<br>G19 Reread Text<br>G20 Text Features & Structural Analysis<br>G21 Survey, Question, Read, Recite, Review (SQ3R)<br>G22 Text Connections<br>G23 Total Physical Response (TPR)<br>G24 Vary Complexity of Assignment<br>G25 Realia/Manipulatives<br>G26 Captioning | H1 Audio-Visual Applications<br>H2 Digital Books<br>H3 Computer Software<br>H4 Document Camera<br>H5 Interactive White Board<br>H6 Tablet/Interactive Devices<br>H7 Language Master<br>H8 Video/Film/CD/MP3<br>H9 Digital Simulations<br>H10 Translation Devices                                                               | I1 Charts (Flowcharts, T-Charts, etc.)<br>I2 Anticipation Guide<br>I3 Cornell Notes<br>I4 Digital Tools/Software<br>I5 Foldables<br>I6 Graphs/Diagrams<br>I7 K-W-L<br>I8 Reading and Analyzing Non-Fiction (RAN)<br>I9 Notes TM<br>I10 Webbing/Mapping<br>I11 Story Maps<br>I12 Timelines<br>I13 Venn Diagrams<br>I14 Vocabulary Improvement Strategyx (VIS) | J1 Art Integration<br>J2 Community Resources<br>J3 Cultural Sharing<br>J4 Celebrations<br>J5 Field Trips<br>J6 Guest Speakers<br>J7 Holiday Programs<br>J8 Multicultural Resources<br>J9 Music/Songs/Jazz Chants                                                                                                                                                                                                                 |                                                                                                                                                                    |

ESOL Department, Broward County Public Schools  
06/2013

**Resources:** Word-to-Word dictionaries in the students' heritage language/English language will be available in the ESOL and Content classrooms throughout the year, as well as, for all district and state assessments.

**The Comprehensive English Language Learning Assessment (CELLA)** The CELLA will be administered each spring to all current ELL students to measure proficiency and gains in reading, writing, listening, and speaking. For Grades K-2, CELLA will be used for classification updates in the spring.

#### Exit procedures:

Students in grades K-2 will be eligible to exit from the school's ESOL program once they score proficient on the Listening/Speaking, Reading and Writing sections of the CELLA. The school will follow the Exit Criteria Flowchart in the District's ESOL Handbook.

Students in grades 3-8 will be eligible to exit from the school's ESOL program once they score proficient on the Listening/Speaking, Reading and Writing sections of the CELLA and score an achievement level of a 3 or equivalent developmental scale score on the Reading/ELA portion of the state standards based assessment approved by the FLDOE. After reviewing scores, the School

will follow the Exit Criteria Flowchart for any students who meet the new exit criteria. The School ESOL contact person, in coordination with its teachers, will follow the following procedures to exit students from the ESOL program:

- ❖ Identify students who are eligible to exit the ESOL program based on the exit criteria.
- ❖ Update the exit information on the ELLSEP folder for exiting students.
- ❖ Complete the appropriate section of the ELLSEP folder with the assessment data used to determine English proficiency, date and signature. If the ELL Committee needs to be convened, parents will be invited and all members of the committee will sign as appropriate.
- ❖ Provide the school data processor with required exit data. The required information is entered in the State Database (TERMS).
- ❖ Notify the parent(s) that the student is exiting the ESOL program.
- ❖ Monitor the student for two years from the exit date in order to ensure success in the mainstreamed classroom.

**Parental Involvement** – The School will advise parents and encourage them to take part in the ESOL Leadership Council monthly. This district-wide forum for Limited English Proficient (LEP) parents and interested community members will allow parents to assist in identifying the educational needs and priorities of ELL students. To promote parent and community participation in programs for ELLs, the school will have a parent representation through school and district parent organizations. Parents of ELLs who are, or wish to be, in leadership positions will also be invited to attend local conferences and will be provided translation technology for better understanding. Participants will acquire relevant knowledge, information, skills and strategies needed to fully integrate into their leadership role at the ESOL Leadership Council or the School Advisory Council.

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

The School will ensure that highly experienced and ESOL certified teachers will be hired to serve the School's English Language Learner Program based on students' proficiency levels. The number of teachers will be based on the number of students identified upon student enrollment (results from home language surveys and/or ESOL levels). Additionally, the school is committed to ensuring that all core curriculum personnel instructing ELL students will have the appropriate training (ESOL endorsement/required coursework including ESOL Issues and Strategies -18, 60, 300 MPP) documentation. The Principal/Staffing Committee will identify each teacher's training status or requirement. The school will identify an ESOL coordinator who will have the responsibility of overseeing, training, and assisting staff in meeting the needs of the school's ELL population throughout the school year. All instructional members will be expected to appropriately identify any ESOL students and levels in their grade books and use ESOL strategies when instructing ELL students.

**Home Language Assistance Program:** Per META Consent Decree, If the school has 15 or more ELL students speaking another language (per language group) other than English, the school will ensure that a linguistically qualified paraprofessional or teacher- proficient in the same language- will be staffed to assist ELL students in understanding ESOL basic subject area and other content instruction. (LULAC et al vs. School Board of Education Consent Decree). Teachers and paraprofessionals assigned to this program are expected to assist ELL students using their home language in the core subject areas of mathematics, science, and social sciences. Tutoring logs indicating services provided will be kept at the school by the administrator supervising the program. The paraprofessional assigned to ELL students will function as an assistant to the student throughout the day.

Bilingual paraprofessionals will assist students through the use of the following:

- ❖ working in small groups
- ❖ translating information
- ❖ interpreting test questions and homework assignments as appropriate
- ❖ helping students comprehend textbooks and other written materials.

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

The School curriculum is designed to serve students of all ability levels, and the School will ensure that all students will be engaged in and benefit from the curriculum, including English Language Learners who enter the school below grade level. Any student in need of remediation for not making adequate progress towards mastery of the Common Core State Standards/NGSSS when applicable, as adopted, will have access to supervised study time and tutoring services during school and non-school hours (e.g. after school, Saturday mornings, etc. and whenever possible, to accelerate and/or remediate student achievement).

English Language Learners will receive instruction, which is comprehensible, equal and comparable in amount, scope, sequence and quality to the instruction provided to English proficient students. A variety of symbolic and concrete referents to illustrate meaning will be used in the classroom and contextual support in the form of hands-on activities and visuals will be used to not only instruct but gauge progress. Teachers will plan lessons that incorporate language development by:

- ❖ offering many opportunities for students to listen, speak, read and write;
- ❖ using cooperative activities;
- ❖ creating an environment where students are engaged in meaningful, comprehensive, and useful language activities;
- ❖ aligning the lessons with Sunshine State Standards and documenting benchmarks as required by the state;
- ❖ focusing on critical thinking and problem-solving skills;
- ❖ providing opportunities for active participation in the learning process.

Apart from providing the specific services listed in a student's English Language Learner Student Educational Plan (ELLSEP) folder IEP, as applicable, the School's faculty will differentiate instruction

as necessary, as well as offer tutoring services or other such assistance to ensure students success. Student performance will be continuously assessed and students not making adequate progress towards mastery of the NGSSS/CC, as adopted, will be identified and the following measures will be instituted:

- ❖ Reading strategies in the content areas will be facilitated throughout the curriculum to provide students additional practice in addition to those taught during language arts classes.
- ❖ Early bird, Super Saturday, and daily pull-out tutoring may be required for those students consistently demonstrating non-mastery of the standards. The team will meet to discuss pull-out tutoring options and all decisions will be documented on the student's English Language Learner Student Educational Plan (ELLSEP) folder, IEP and Matrix of Services.
- ❖ Students consistently demonstrating non-mastery of Benchmarks on teacher generated quizzes, chapter tests, projects, investigations, and poor academic progress will be targeted for supplemental and intensive instruction/intervention.

All ELL students will be monitored as stated on their English Language Learner Student Educational Plan (ELLSEP) folder, IEP and quarterly progress notes will be sent to the parents attached to their report cards every nine weeks.

Essentially, if a student is not able to learn after various ELL interventions are given, the school will begin an RTI- just as any other struggling student would require in attempts to engage the student, allowing them to benefit from the curriculum.

## Section 8: School Climate and Discipline

### A. Describe the school's planned approach to classroom management and student discipline.

The School's philosophy regarding student behavior ensures its commitment to the School's mission on a daily basis. Its founders are of the opinion that both teachers and students need to be provided with a consistent behavior management system so that maximum time can be spent teaching and learning. Inappropriate behaviors that interfere with the learning process and the expectations set for character development can be reduced and ultimately extinguished through consistent, best-practice behavior management techniques.

The School will function on the belief that a safe and orderly school is of primary importance in order to create an enjoyable environment for both students and teachers. Discipline at the school will be approached with objectivity, consistency and equity. When children behave in a respectful, responsible and safe manner, they learn more and develop into children whose character counts. With the children's best interests in mind, it is imperative that parents and staff work together to ensure a happy, safe and productive learning experience. The School expects parents to take an active role in supporting this plan in order for children to learn to be responsible citizens.

Thus, behavior management based on a positive reward/point system will be in place in all classrooms from the beginning of the first year of operation. Pre-service and in-service training will be required of all teachers. Each teacher, then, will be given the opportunity to implement her/his own behavior management techniques in their respective classrooms. The ultimate goal will be to remove these systems from the classrooms, based on the theory that appropriate behaviors will be internalized and external reward systems will no longer be necessary.

The school expects all staff to model and practice the Character Traits - Responsibility, Citizenship, Kindness, Honesty, Self-Control, Tolerance, Respect and Cooperation.

### B. Describe the school's Code of Conduct, including the school's policies for discipline, suspension, and dismissal.

The School will adopt and follow the most recent version of the *Broward County Public Schools Handbook Code of Student Conduct Policy 5.8 and Discipline Matrix*, therein incorporating the district's policies and expectations for students related to consistent and timely attendance, respect for persons and property, appropriate dress, technology usage, student publications, student activities, student records, and the right to appeal, including grievance procedures. This information will be made available to parents and students upon registration. The principal and staff have the responsibility and authority for maintaining the orderly educational process. The principal is authorized to take administrative action whenever a student's misconduct away from school has a detrimental effect upon other students or on the orderly educational process. Teachers and administrators will strive to use a variety of informal disciplinary or guidance strategies, prior to, during, and after formal disciplinary action. Following the county, the school

will distribute the *Broward County Public Schools Handbook Code of Student Conduct Policy 5.8* electronically and ensure that all parents and students sign and return the Acknowledgement form provided on page 11 of the handbook. The school will retain the signed form in office with student records. Somerset parents will be encourage to take an active role in supporting this plan. In order for student to be responsible citizens, parents and school staff must work together to ensure a safe, conducive and productive learning environment.

Furthermore, a collaborative problem solving process will be utilized to address learning and/or behavioral challenges identified by the classroom teacher and/or identified by the parent and corroborated by the teacher as an in-school behavior. The School will have a team (like a child study team) comprised of a School counselor, a member of the administrative team, and respective department heads e.g. members of the curriculum council (wherein every department is represented) and referring teacher and parent, when appropriate, will meet to discuss the pattern of behavior, targeted potential strategies to aim at assisting the child curtail the undesired behavior or learning outcome. The group will really consider the actual repetitive harmful behavior, and assign targeted strategies and or interventions (including timeframes for implementation and an informal plan of action) will be planned, implemented and subsequently evaluated at a subsequent meeting. The student's response and the results of intervention will be discussed and further action will be determined based on specific data and results gathered. Through this process, the student's needs can be addressed across the curriculum and the strategies can be individualized as well as the student's needs can be discussed and results compared, with allocation of necessary resources being implemented throughout the school day and in every discipline. The goal of this approach is to assist and support the child, avoiding, whenever possible, the necessity for punitive measures that will interrupt the integrity of the everyday academic or social setting of the child.

In accordance with the BCPS Students Conduct Code Book and the respective Discipline Matrix, the most appropriate disciplinary action taken by the School's officials, will be the least extreme measure that can resolve the discipline problem. Teachers and administrators strive to use a variety of informal disciplinary or guidance strategies, prior to, during, and after formal disciplinary action. The following will be the manner for issuing consequences for violations of classroom and/or school rules:

#### **Classroom Consequences:**

- 1<sup>st</sup> Consequence – VERBAL WARNING
- 2<sup>nd</sup> Consequence – PARENT CONTACT (CALL AND/OR EMAIL)
- 3<sup>rd</sup> Consequence – DETENTION
- 4<sup>th</sup> Consequence – ADMINISTRATIVE REFERRAL
- 5<sup>th</sup> Consequence – BROWARD COUNTY DISCIPLINE MATRIX\*

\*The student may receive One (1) to ten (10) days of indoor suspension. If the infraction calls for a more severe consequence, the student may receive one (1) to ten (10) days of outdoor suspension.

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

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

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

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

#### **Suspension:**

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

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

- ❖ The student's presence in school presents a physical danger to the student or others;
- ❖ A "cooling off" period is needed in order to relieve tensions and relieve pressure; and/or
- ❖ The student and/or parent refuse an alternative to suspension.

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

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

#### **Dismissal or Recommendation for Expulsion:**

In accordance with the SB Policy 5006, the School's Principal may request that the Superintendent recommend to the School Board that a student be expelled. The Principal of the School may take this

action when he/she has exhausted less severe administrative disciplinary action, or when he/she has considered those alternatives and rejected them as inappropriate in the given situation.

**Glossary of terms:**

1. [After School Detention](#): being detained in a designated room after school as determined by the classroom teacher and Principal. Time spent is determined by the severity of the infraction. Any after-school activities (sports, clubs, etc.) may be attended but the student will not be eligible to participate. Parents must be notified ahead of time to make appropriate arrangements.
2. [Severe Clause](#): extremely disruptive behavior resulting in immediate removal from class to the principal's office and/or from school.
3. [Disrespect](#): to be rude or discourteous to another person, talking back, or arguing with another.
4. [Outdoor Suspension](#): takes away the privilege of attending school for a certain number of days. A student receiving OSS may not be allowed to participate during the OSS period in after-school activities or set foot on campus (i.e., sports, clubs, etc.). Work missed during OSS may be made up for credit.
5. [In-School Suspension \(SCSI\)](#): takes away the privilege of attending classes; student remains in school and may get credit for work completed during ISS. A student receiving ISS may not be allowed to participate or attend during the ISS period in after school activities (i.e., sports, clubs, etc.).
6. [Possession](#): Ownership; to carry on as if you owned it; to have in your control.
7. ["NO TOLERANCE" Policy](#): the School maintains a "NO TOLERANCE" policy for weapons in school. Any child bringing weapons to school, including toy weapons, will be considered for expulsion.
8. [Code of Conduct](#): a set of rules that develop self-control and orderliness in students by providing logical consequences for both appropriate and inappropriate behavior; the goal being a safe and orderly education for ALL STUDENTS.
9. [Respect](#): to be courteous to those around you; to show consideration.
10. [Detention](#): students who do not comply with the Code of Conduct, uniform code, etc., may be given a detention. Students will assist with cleaning chores in the cafeteria, media center, classrooms and around the school grounds, and thereafter will write a positive essay about their experience. Students receiving a detention must attend on the date scheduled. Three detentions will result in a mandatory meeting with the parents and the administration to discuss the next step.



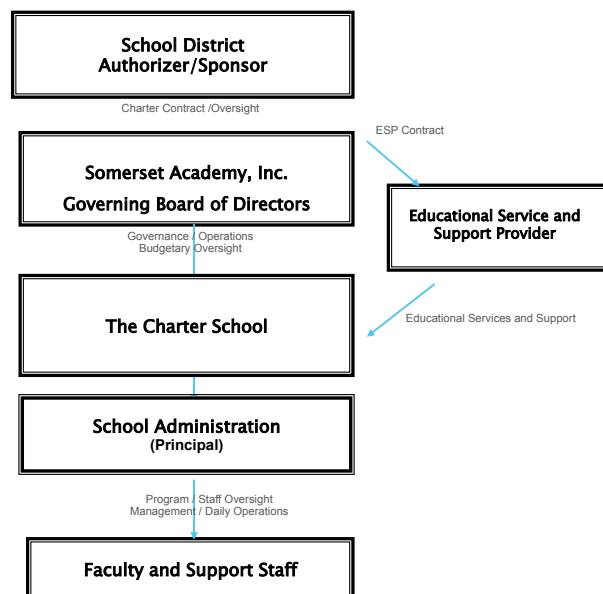
## II. ORGANIZATIONAL PLAN

### Section 9: Governance

#### A. Describe how the school will organize as or be operated by a non-profit organization.

Somerset Academy, Inc., a non-profit Florida corporation, is the legal entity that will operate the School as per the *Articles of Incorporation*, (Appendix A) and *Bylaws* (Appendix B). The governing board of directors (the “Governing Board”) will have the responsibility for the activities and affairs of the corporation, including management of the school and for providing continuing oversight of school operations. All corporate powers and functions shall be exercised by the Governing Board. The Governing Board is committed to the mission of the school and is cognizant of its responsibility to effectively and properly manage public funds.

#### B. Provide an organizational chart for the school and a narrative description of the chart. Clearly describe the proposed reporting structure to the governing board and the relationship of the board to the school’s leader and administration.



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The Somerset Academy, Inc. Governing Board is the ultimate policy-making body with the responsibility of operation and oversight of the school including but not limited to academic direction, curriculum, and budgetary functions. The school principal, hired by the board, will be responsible for all aspects of school operations within the scope of operating policies and procedures and budgetary functions as adopted and approved by the Governing Board. The

school's faculty and staff will report directly to the principal, who shall report to the Governing Board.

The School's on site administration (principal, an assistant principal and/or lead teacher) will ensure that the operations of the School (resources, courses, policies) are in accordance with the mission and vision of the School as adopted and approved by the Governing Board. The administrative staff, as instructional leaders, will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the School. The faculty and secretarial staff will be responsible for carrying out these procedures in their daily activities and interactions with students, parents and the community.

**C. Provide a description of how the governing board will fulfill its responsibilities and obligations, including but not limited to::**

- **Adoption of annual budget**
- **Continuing oversight over charter school operations**

The Governing Board is the ultimate policy-making body for the school, and will have the responsibility for the affairs and management of the school. The Governing Board will provide continuing oversight of school operations, including a responsibility to effectively and properly manage public funds.

The Governing Board will fulfill its responsibilities and obligations by performing the following duties, as well as any and all other duties specified in Florida Statutes regarding Governing Boards of Charter Schools and any other duties specified therein the Applicant's Bylaws:

- ❖ Oversee operational policies; Academic accountability, and financial accountability.
- ❖ Annually adopt and maintain an operating budget.
- ❖ Exercise continuing oversight over charter school operations.
- ❖ Report its progress annually to its sponsor, which shall forward the report to the Commissioner of Education at the same time as other annual school accountability reports.
- ❖ Ensure that the charter school has retained the services of a certified public accountant for the annual financial audit who shall submit the report to the governing body.
- ❖ Review and approve the audit report, including audit findings and recommendations
- ❖ Monitor a financial recovery plan in order to ensure compliance (if applicable).
- ❖ Report progress annually to its sponsor, including at least the following components (i.e. Charter School Annual Report):
  - a. Student achievement performance data
  - b. Financial status of the School, including revenues and expenditures at a level of detail that allows for analysis of the ability to meet financial obligations and timely repayment of debt.
  - c. Documentation of the facilities in current use and any planned facilities for use by the charter school for instruction of students, administrative functions, or investment purposes.
  - d. Descriptive information about the charter school's personnel, including salary and benefit levels of charter school employees, the proportion of instructional personnel

who hold professional or temporary certificates, and the proportion of instructional personnel teaching in-field or out-of-field.

**D. Describe the proposed policies and procedures by which the governing board will operate, including board powers and duties; board member selection, removal procedures and term limits; code of ethics, conflict of interest, and frequency of meetings. If the Board has not yet developed policies, the applicant shall describe the timeline for development and approval of Board policies.**

***Charter school governing boards must be guided by a set of by-laws that define how the board will operate. Applicants may include their proposed by-laws.***

The Applicant's Bylaws clearly specify the selection, removal procedures, and term limits of Board Members, and is summarized as follows:

**Selection:** Directors shall be elected at a duly organized meeting of the Governing Board. Notice of the Governing Board's intentions to elect any such Director shall be included in the agenda for that meeting and publicly announced in accordance with Sunshine Law requirements. Newly created directorships resulting from an increase in the number of directors comprising the board and all vacancies occurring on the board for any reason shall be filled by the majority of the members in office at a duly organized meeting of the Governing Board. A member elected to fill a newly created directorship or a vacancy will serve until a successor is elected. Newly elected members will agree to support the founding organization's vision in order to maintain continuity between the founders and the subsequent board members.

**Removal Procedures:** A Director may be removed without cause by a majority of the Directors then in office.

**Term Limits:** Each member of the Board of Directors shall have a term of five (5) years and may only be elected for up to three (3) consecutive years. Upon serving the maximum term, a Director's term shall automatically expire without further action of the Board.

The policies and procedures by which the board will operate, including specific board member powers are specifically detailed in the attached Bylaws.

A brief overview of those policies and procedures is as follows:

**Board Member Powers:** Subject to the limitations of the Florida not-for-profit corporation law, the corporation's Articles of Incorporation and Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board shall have the following powers in addition to any other powers enumerated in the Bylaws and permitted by law

- ❖ Select and remove all of the officers, agents and employees of the corporation and prescribe powers and duties for them which are not inconsistent with the law

- ❖ To conduct, manage and control the affairs and activities of the corporation
- ❖ To adopt, make and use a corporate seal
- ❖ To borrow money and incur indebtedness for the purpose of the corporation
- ❖ To act as trustee under any trust incidental to the principal object of the corporation, and receive, hold, administer, exchange and expend funds and property subject to such trust
- ❖ To acquire by purchase, exchange, lease, gift, devise, bequest or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property
- ❖ To assume any obligations, and enter into any contracts or other instruments
- ❖ To form and be a member or shareholder of a not-for-profit entity organized under the law of any state
- ❖ To carry out such duties as described in the Articles of Incorporation and Charter Contract

**Board Member Duties:** The Governing Board will perform the following duties, as well as any and all other duties specified in Florida Statutes regarding Governing Boards of Charter Schools and any other duties specified in the Bylaws:

- ❖ Oversee operational policies; Academic accountability, and financial accountability.
- ❖ Annually adopt and maintain an operating budget.
- ❖ Exercise continuing oversight over charter school operations.
- ❖ Report its progress annually to its sponsor, which shall forward the report to the Commissioner of Education at the same time as other annual school accountability reports.
- ❖ Ensure that the charter school has retained the services of a certified public accountant for the annual financial audit who shall submit the report to the governing body.
- ❖ Review and approve the audit report, including audit findings and recommendations
- ❖ Monitor a financial recovery plan in order to ensure compliance (if applicable).
- ❖ Report progress annually to its sponsor

**Code of Ethics:** It is Board policy that employees and board members uphold the highest standards of ethical, professional behavior. To that end, these employees and board members will agree to commit themselves to carrying out the mission of this organization and shall:

- ❖ Be mindful of and honor the safety, health and welfare of the public in the performance of professional duties.
- ❖ Act in such a manner as to uphold and enhance personal and professional honor, integrity and the dignity of the profession.
- ❖ Treat with respect and consideration all persons, regardless of race, religion, gender, sexual orientation, maternity, marital or family status, disability, age or national origin.
- ❖ Recognize that the mission at all times is the effective education of children and the development of institutions to foster that mission.
- ❖ Engage in carrying out the Board's mission in a professional manner.
- ❖ Collaborate with and support other professionals in carrying out the educational mission.
- ❖ Build professional reputations on the merit of services.
- ❖ Keep up to date and informed on emerging issues and business of the Board, and to conduct

themselves with professional competence, fairness, impartiality, efficiency and effectiveness.

- ❖ Uphold and implement policies adopted by the Board of Directors.
- ❖ Keep the faculty, parents, students and community informed about issues affecting them.
- ❖ Conduct organizational and operational duties with positive leadership exemplified by open communication, creativity, dedication and compassion.
- ❖ Exercise whatever discretionary authority they have under the law so as to carry out the mission of the organization.
- ❖ Serve with respect, concern, courtesy, and responsiveness in carrying out the organization's mission.
- ❖ Demonstrate the highest standards of personal integrity, truthfulness, honesty and fortitude in all activities in order to inspire confidence and trust in such activities.
- ❖ Avoid any interest or activity that is in conflict with the conduct of official duties.
- ❖ Respect and protect privileged information to which they have access in the course of their official duties.
- ❖ Strive for personal and professional excellence and encourage the professional development of others.

**Conflict of Interest Policy:** As a nonprofit, tax-exempt organization authorized to operate charter schools, the operations of the Applicant can also be viewed as a public trust, which is subject to scrutiny by and accountable to the public. Consequently, a fiduciary duty exists between the Board, officers, management employees, and the public, which carries with it a duty of loyalty and fidelity. The Board, officers, and management employees have the responsibility of administering the affairs of corporation honestly and prudently. Those persons shall exercise the utmost good faith in all transactions involved in their duties, and they shall not improperly use their positions with, or knowledge gained from the organization for their personal benefit.

**Nature of Conflicting Interest:** A conflicting interest may be defined as an interest, direct or indirect, with any persons or firms mentioned above. Such an interest might arise through:

- Owning stock or holding debt or other proprietary interests in any third party dealing with the Corporation.
- Holding office, serving on the Board, participating in management, or being otherwise employed (or formerly employed) with any third party dealing with the Board.
- Receiving remuneration for services with respect to individual transactions involving the Corporation.
- Using the corporation's time, personnel, equipment, supplies or good will for other than Board - approved activities, programs and purposes.
- Receiving personal gifts or loans from dealing or competing third parties. Receipt of any gift is disapproved except gifts of a value less than \$150, which could not be refused without discourtesy. No personal gift of money should ever be accepted.

**Interpretation of this Statement of Policy:** The areas of conflicting interest listed and the relations in those areas, which may give rise to conflict are not exhaustive. Conflicts might arise in other areas or through other relations. Directors, officers and management employees will hopefully recognize such areas and relation by analogy. However, it is the policy of the Board that the

existence of any conflict of interest shall be disclosed before any transaction is consummated. It shall be the continuing responsibility of the Board, officers, and management employees to scrutinize their transactions and outside business interests and relationships for potential conflicts and to immediately make such disclosures.

**Disclosure Policy and Procedure:** Transactions with parties with whom a conflicting interest exists may be undertaken only if all of the following are observed: The conflicting interest is fully disclosed; 2. The person with the conflict of interest is excluded from the discussion and approval of such transaction; 3. Where products, goods or services are being procured or sold, that there exists reliable independent evidence of fair value (which shall be specifically identified in and attached to the minutes), which may include a competitive bid or market survey or comparable valuation or other reliable evidence of market value; and The Board has determined that the transaction is in the best interest of the organization.

Disclosure in the organization should be made to the Board Chair who shall bring the matter to the attention of the Board. Disclosure involving the directors should be made to the Board. The Board shall determine whether a conflict exists and in the case of an existing conflict, whether the contemplated transaction may be authorized as just, fair and reasonable. If the conflict is not deemed to be material and the conflicted party is excluded from the decision making process, then the Board can use its reasonable judgment and make a decision, which it deems to be in the best interest of the entity. The decision of the Board on these matters will rest in its sole discretion, and its concern must be the welfare of the Corporation and the advancement of its purpose.

**Meeting schedule selection:** A procedure for selection of meeting schedule is clearly written in the Applicant's Bylaws. The Applicant will vote upon and post their meeting schedule for the opening school year, and annually thereafter, in accordance with chapter 119 of the Florida Statutes, relating to public records, and public meetings.

In accordance with 1002.33(7)(d)(2) F.S., the governing board will hold at least two public meetings per school year in the school district. The meetings will be noticed, open, and accessible to the public, and attendees will be provided an opportunity to receive information and provide input regarding the charter school's operations.

**E. Explain how the founding group for the school intends to transition to a governing board. (This question is not applicable if the applicant is an established governing board.)**

*Not applicable. The applicant is an established governing board.*

**F. Describe the plans for board member recruitment and development, including the orientation process for new members and ongoing professional development.**

Since the Governing Board is an existing entity and has already been established, the Governing Board will recruit members as vacancies arise, and will endeavor to fill these vacancies with those

who will commit to forward the mission of the School. Board members will agree to oversee the operational policies, and ensure academic accountability and financial accountability of the School as well as participate in charter school governance training and successfully undergo a background check by the Sponsor, as specified by law.

Governance Training: The administrators and Governing Board members will be trained in the areas of Non-Profit Board Governance, Florida's Open Government Requirements, the Florida Sunshine Law, and the Florida Public Records Law. This training will be provided by The Florida Consortium of Charter Schools or another approved vendors. Further, as presented in the Applicant's Bylaws, The Applicant shall develop an orientation and training program for new directors and an annual continuing education program for existing directors.

- G. List each of the proposed members of the school's governing board, indicating any ex-officio members and vacant seats to be filled. For each proposed member, provide a brief description of the person's background that highlights the contribution he/she intends to make through service as a governing board member and any office of the board that individual holds. Complete Addendum B (Form IEPC-M1A) if the proposed school will be operated by an existing governing board that operates or has operated charter schools in Florida. Otherwise complete Addendum A (Form IEPC-MIA) to include each member of the applicant group.**

#### **SOMERSET ACADEMY, INC. BOARD MEMBERS**

##### **David Concepcion – Director / Chair**

Mr. Concepcion has been a part of the Charter School movement, originally serving as Board Member and Chairman of Mater Academy Charter Schools from 2003-2006, and later joining the Somerset Academy Charter Schools as an Executive Board Member since 2006. David worked as the Chief Legislative Aide with the Florida House of Representatives, Mayor's Chief of Staff and City Clerk in the City of Hialeah, FL, and currently serves as the Assistant City Manager and City Clerk at the City of Pacific Grove, CA. Mr. Concepcion has experience in the areas of bill-drafting, presentation of legislation, implementation of legislation among governmental agencies, fundraising, governmental relations, and municipal management. Mr. Concepcion works directly with local constituency and serves as a liaison to the community with the media, state, federal and local agencies. Mr. Concepcion attended the University of Florida, where he obtained a Bachelor of Arts Degree in Political Science with a specialization in International Relations and Latin American Studies; and is currently studying to obtain his Masters in Public Administration from St. Thomas University.

##### **Lourdes Isla – Director / Vice-Chair**

Ms. Lourdes Isla is an accomplished educator with ten years of experience in the field of education. Ms. Isla is currently the principal of Mater Gardens Academy Elementary and Middle Charter Schools, both A+ charter schools in Miami-Dade County. She is responsible for overseeing the daily school operations of 500 students and over 30 staff members. Under Ms. Isla's direction, the schools are ranked among the top third of public elementary and middle schools in Miami-

Dade County, achieving Adequate Yearly Progress under Federal standards of the No Child Left Behind Act and earning “A” grades from the Florida Department of Education. Ms. Isla is currently pursuing her doctorate degree in Organizational Leadership from Nova Southeastern University.

**Todd German – Director / Treasurer**

Todd was born in Augsburg, Germany when his father was serving in the U.S. Army. Raised in Virginia Beach, Todd has been a resident of the Florida Keys for 16 years and has lived in Key West since 1999. As a young man, Todd enlisted in the U.S. Army on his 18th birthday and served in the 82nd Airborne and 7th Special Forces at Ft. Bragg, N.C.

Professionally, Todd is an Investment Advisor and partner in Keys Wealth Management, a private investment management firm. He has previously served as a senior officer for a number of local financial institutions. Since arriving on the island, he has immersed himself in leadership roles in the arts, civic activities and the business community.

Most recently, Todd is the President of the Key West Collegiate School, Vice Chair of the Community Foundation of the Florida Keys, Vice President of the Key West Business Guild and member of the Key West Citizen Editorial Board. In addition, he is the Chairman and spokesperson for Hometown! PAC. He is the former President of the Montessori Charter Elementary School, Former Chair of the Key West Citizen’s Review Board, and former President of the Key West Botanical Garden Society. Todd is a graduate of Leadership--Monroe County, the Key West Ambassador Program and the Key West Citizen’s Police Academy. He holds memberships in all the associations promoting business in Key West--the Attractions, Lodging, Innkeeper’s and Realtor’s Associations. His daughter Valerie, an Ultra Marathoner, is currently an Internal Medicine resident at Eastern Virginia Medical School.

**Ana Diaz, M.S. Elementary Ed. – Director / Secretary**

Ms. Diaz has been in the field of education for over fourteen years. She earned her Master’s Degree in Elementary Education from the University of Florida and began her career as a teacher in the Miami-Dade County Public School System. Ms. Diaz continued her studies at Nova Southeastern University where she completed her certification in Educational Leadership. In the fall of 2005, Ms. Diaz began working with Charter Schools and she serves as the Principal of Pinecrest Preparatory Academy Charter School. In addition to supervising the daily school operations, her areas of expertise include curriculum planning, program evaluation, data analysis, assessment design and professional development. Ms. Diaz has been an integral part in the success of the Pinecrest Academy Inc. school organization. Since her election to the Somerset School Board in May of 2013, Diaz has effectively provided oversight and support in her areas of expertise for several of the Somerset Schools and organization.

**Raul L. Martinez, Jr.- Director / Parent Representative**

As the Deputy Chief of Staff & District Director, Mr. Martinez oversees all district offices operations and work flow. He is responsible for recruiting, hiring, training, and managing district staff; he also represents Congressman Joe Garcia at events; monitors district issues and politics, while conducting staff outreach. Mr. Martinez also develops and implements policy objectives, strategies and operating plans for the Congressman’s district offices and directs all activities and staff in the district.



Previously, as the Interim Chief of Staff, Mr. Martinez, was the Member's chief policy advisor. He was responsible for developing and implementing position strategies and operating plans for the Member's offices and managing and directing all activities and staff of the Member's Washington D.C. and district offices including overseeing the office budget. Mr. Martinez acted as the Member's principal liaison and responded to office visits and telephone inquiries from constituents and various interest groups.

As Hispanic Vote Director, Mr. Martinez managed community-oriented, metric-driven program to register, engage and turnout Hispanic voters in support of President Barack Obama's re-election in partnership with field, political, communications, digital, data, voter protection and operations departments. He implemented local capacity-building efforts – developing training materials in English and Spanish, organizing voter education events, engaging community stakeholders as strategic partners in organizing structure and contributed to field program by organizing 100's of Hispanic engagement activities across Florida recruiting over 200 volunteers. Other positions Mr. Martinez has held include Hispanic Outreach Director for Democracy at Stake, Managing Partner of Martinez Consulting Group, Regional Manager – Prestige Builders Group; Senior Account Manager – Public Relations Agencies and Public Information Officer – Miami-Dade Aviation Dept. Mr. Martinez earned a Bachelors Degree in Public Relations and Communications from Florida International University and Associates in Arts from Miami-Dade Community College.

#### *Jenny Equijarosa – Director / Parent Representative*

Ms. Esquijarosa is a graduate from Florida International University, school of Journalism and Mass Communications. Her background in event planning and marketing makes her a valuable asset to the Somerset Board. Additionally, Ms. Equijarosa is a charter school parent, having served on the Pinecrest Academy Charter School Board. Responsibilities include logistics & production of dozens of local and nationwide events ranging from private functions of 50 guests, to public events and street festivals of 50,000 consumers. Furthermore, she coordinated marketing, promotional and public relations programs for the live entertainment division, including an exclusive concert series for the Florida Marlins. Ms. Esquijaosa has been with the Somerset Board since 2014.

#### *Tony Morales- Director / Student Alumnus*

Tony Morales is a proud alumnus of Somerset Academy Charter High school. Graduating summa cum laude from Broward College, he obtained his Associates Degree and is now currently attending the University of Pennsylvania. He currently serves as the Chairperson of the Board of Directors for *Under A Tree, Inc.*, a nonprofit that works with educational administrators, postsecondary academics, management consultants, venture capitalists, business leaders, and politicians, to connect diverse student populations with transformational leadership education and high-profile mentorship.

Also the CEO of *Prepory*, he develops college admissions consultancy strategies, including human capital sourcing, international marketing, curriculum crafting, and operations flow formulation. Mr. Morales serves as Consulting Director for 180 Degrees Consulting, the world's largest nonprofit student consultancy. In that capacity, he leads projects to drive organizational change across clients including Camden City Public Schools in New Jersey and Freire Charter School in Pennsylvania. Previously, he served as Director of Strategy and Analytics and Director of Compliance and Governmental Affairs for Academica Virtual Education.

### **George B. Ozuna – Director**

George B. Ozuna is a Hydrologist with the U.S. Geological Survey (USGS) whose public service has spanned over 30 years. After graduation from the University of Texas at San Antonio with a B.S in Geology in 1980 he was hired by the USGS as a hydrologist in 1981, and assigned to the San Antonio office. Initially, he was a team member for a project collecting and analyzing data on the Edwards aquifer. From 1984 to 1990 he served as a project chief on several different studies that included such work as: monitoring well installation, aquifer testing, evaluating shallow ground-water systems, and describing the surface hydrogeology. In June 1991, he became the San Antonio Water Quality Specialist, assisting the Office Chief in the development of water-quality projects in the office. In 1993, George was selected as the San Antonio Office Chief as Supervisory Hydrologist and 2009 was promoted to a new position as Deputy Director for the USGS Texas Water Science Center. In January 2013 he took on a new position as Senior Program Manager.

George has worked tirelessly throughout his USGS career to apply his hydrologic knowledge and research to address water issues in the San Antonio area. His outreach efforts to the area's predominantly Hispanic community have been a major factor in the link between the USGS and the San Antonio Hispanic community. This is evidenced by his personalized educational lectures to the area schools and communities and his student mentorship program. Frequently, these efforts have been on George's personal time and paid for out of his own pocket.

In his career with the USGS, he continually is involved in diversity efforts; he served as a vocal member of the Ethnic Minority Advisory Committee and actively on the USGS Bureau Outreach and Recruitment Team. As the USGS representative, George served on the committee that prepared the Department of the Interior Hispanic Association of Colleges and Universities (HACU) Memorandum of Understanding. His participation in the diversity programs for the USGS extended the USGS diversity programs goals into his own office and serve as a model of success for all of the USGS. To his staff, the students he has mentored, the Hispanic community within San Antonio, and his family, George is an extraordinary modest unsung champion. He is a man of integrity in both his professional and personal life. He has sacrificed many opportunities to leave the San Antonio area for career advancement in order to be an active resource to the Hispanic community of his ancestors. He has maintained an honest obligation regarding the science impact of his hydrology discipline that makes a huge difference to the welfare of the Hispanic community where he lives and works. On the job and after work, his colleagues and neighbors admire and respect him as a person that the San Antonio community as a whole and the Hispanic community in particular can count on to always act selflessly on their behalf.

George is widowed after 30 years of marriage to his wife Ninfa and has two children; Andrea, 22, is a graduate of Incarnate Word High School and now a senior at Rockhurst University. Their son Matthew, 21, is a graduate of Central Catholic High School and a junior at University of North Texas.

### **Louis J. Marin – Director**

Louis Marin is the Compliance Officer at Generations Federal Credit Union since June 2013. In that capacity, Marin is responsible for monitoring both Federal and State laws and regulations applicable to Credit Union operations administering loss prevention programs, managing security, vendor management programs and risk management processes. In addition, he serves as the

Security Officer for the \$400 million, 48,000 member credit union. A native of San Antonio, Texas, Marin obtained his Bachelor's of Business Administration degree in Accounting from University of Texas at San Antonio in 1981. After an extensive career in the private and public sectors, Marin began working with the credit unions in 2004, where he served as the Vice-President of Project Management, until his currently held position. He is married to his wife Sandra and they have two children; Danielle and James. He serves on several volunteer committees and is a certified Sports Official in basketball, soccer, football and softball.

#### **H. Outline the methods to be used for resolving disputes between a parent and the school.**

The school's governing board will appoint a representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes. The representative may be a governing board member, charter school employee, or individual contracted to represent the governing board. The representative's contact information will be provided annually in writing to parents and posted prominently on the charter school's website if a website is maintained by the school. The appointed representative and charter school principal or director, or his equivalent, will be physically present at board meetings in accordance with 1002.33 (7)(d)(1) and 1002.33(7)(d)(2), Florida Statutes.

Positive relations between the School and its parents and families are a primary concern. For that reason, every effort will be made to handle disputes in the most positive way possible. The following steps have been outlined in order to facilitate resolution of such issues:

- Step 1: Make an appointment to clarify issue with your student's teacher (if applicable).
- Step 2: Make appointment to clarify issue with the school administrator.
- Step 3: Contact Educational Support Provider
- Step 4: Contact Board Appointed Parent Liaison
- Step 5: State concerns at a scheduled Governing Board meeting.



## Section 10: Management

### A. Describe the management structure of the school. Include job descriptions for teachers and each administrative position that identify key roles, responsibilities and accountability.

The management structure for the school's day-to-day operations will be as follows:

**The Governing Board** will hire and oversee the school principal. **The Principal**, as the instructional leader, will be responsible for all aspects of day-to-day administration of the school within the scope of the board's operating policy and in compliance with district, state, and federal guidelines for the school's operation. The Principal will hire, oversee, and evaluate faculty and staff. The principal will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the school including procedures for curriculum and instruction, classroom management, discipline, faculty and staff evaluation, data analysis, testing, support services, parental communication, professional development, discipline, community outreach, oversight of facilities and internal financial controls, etc. The principal will report to the board on the school's operations and finances at minimum at every governing board meeting and will be expected to communicate with the board as often as needed by the School and/or board members in order for school's operational needs to be met.

**The administration** will implement policies and procedures for the daily operations of the school. The principal will delegate duties to administrative support staff to ensure that daily operations, resources, policies and procedures are being implemented in accordance with the school's mission. Faculty and staff will be responsible for carrying out these procedures in their day-to-day duties, activities, and interactions with students, teachers, and parents of the school.

The duties and key roles for these key personnel are detailed in the job descriptions, Appendix F.

The Board expects it will contract with Academica, an Educational Services and Support Provider, to provide off-site support to the school. The support services to be provided are central office functions including but not limited to: assistance with facilities design and maintenance, staffing recommendations and human resource coordination, curriculum support, research and updating, sponsor relations and reporting, program marketing, general accounting services including bookkeeping, payables, asset management, budget preparation, risk management, cash flow analysis, and preparation of financial statements provided to the Governing Board for oversight and approval.

The Sample ESP agreement, in Appendix D, herein includes all anticipated professional support services to be provided.

**Financial Oversight and Management** - The Governing Board has the ultimate responsibility of ensuring that the school's finances are managed properly. As per the duties described in *Section 9-Governance*, the Board will annually adopt and maintain an operating budget and maintain oversight of all school-based finances. The Governing Board will ensure that the charter school has retained the services of a certified public accountant for the annual financial audit. The ESP, as contracted by the Board, will assist the School with additional preparation and reporting of the school's finances.

The school principal, with support from the ESP, will prepare the estimated budget using anticipated enrollment projections prior to the beginning of each fiscal year. Hiring and procurement decisions will be made at that time. Enrollment will be closely monitored in order to make sure that appropriate master schedules and hiring decisions remain within budgetary constraints. Budget reports will be prepared and presented to the Sponsor and the Board on a monthly basis for oversight. Budgets will be prepared and presented to the Board at all quarterly board meetings.

The board has also established financial policies and internal controls for the school's operational and internal accounts. These policies and controls are detailed in Section 18, *Financial Management and Oversight*, of this application.

**B. Outline the criteria and process that will be used to select the school's leader and the process by which the school leader will be evaluated.**

The school principal will be hired by the board, and will be responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The Board intends to recruit talented individuals who have knowledge of and experience with instructional, educational, and school-site matters. The school will adhere to the anti-discrimination provisions of s. 1000.05, Florida Statutes.

At minimum, the Governing Board will seek an individual who has:

- ❖ extensive administrative and teaching experience;
- ❖ State of Florida Educational Leadership Certification;
- ❖ experience working with school or advisory educational boards;
- ❖ strong managerial capabilities;
- ❖ knowledge of the needs of student population;
- ❖ positive evaluations from previous administrative position(s);
- ❖ letters of recommendation;
- ❖ excellent communication skills; and
- ❖ demonstrated capacity to meet and or exceed the Florida Principal Leadership Standards

**Administrator Evaluations-**

In compliance with s. 1012.34, F.S., the administrator's evaluation must, at minimum, be based on the following components:

**1. Performance of students** *At least* one-third of a performance evaluation will be based upon data and indicators of student performance\* This portion of the evaluation will include growth or achievement data of the students attending the school over the course of at least 3 years. If less than 3 years of data are available, the years for which data are available will be used.

\*Student learning growth will be assessed annually and measured by statewide assessments using performance standards adopted into State Board Rule for courses beginning in 2015-16. For courses/subjects not measured by statewide assessments, and courses with statewide assessments without a state-adopted growth model, the school will abide by the district's adoption of either all, some or none of the results of statewide assessments in the performance of students component. (s. 1012.34, F.S.)

**2. Instructional Leadership** - *At least* one-third of the performance evaluation must be based on instructional leadership. Evaluation criteria for instructional leadership must include indicators based upon each of the leadership standards adopted by the State Board of Education under s. 1012.986, including: performance measures related to effectiveness of classroom teachers, recruitment and retention of effective & highly effective teachers, improvement in the percentage of instructional personnel rated as highly effective & effective, appropriate use of evaluation criteria and other practices that result in student learning growth.

**3. Professional & Job Responsibilities** - the remainder of the performance evaluation may include, but is not limited to, professional and job responsibilities as adopted by State Board of Education and/or the Governing Board of the school and may also include a mechanism to give parents and teachers an opportunity to provide input into the administrator's performance assessment, when appropriate.

Accordingly, the FCPCS School-Based Administrator Evaluation System -which meets the above statutory requirements and is aligned to the Florida Principal Leadership Standards, approved by the Florida Department of Education.

The governing board will conduct formal administrator evaluations annually in accordance with s. 1012.34, F.S.

The evaluation systems for school administrators must:

- ❖ Be designed to support effective instruction and student learning growth, and performance evaluation results must be used when developing district and school level improvement plans.
- ❖ Provide appropriate instruments, procedures, timely feedback, and criteria for continuous quality improvement of the professional skills of instructional personnel and school administrators, and performance evaluation results must be used when identifying professional development.
- ❖ Include a mechanism to examine performance data from multiple sources, including opportunities for parents to provide input into employee performance evaluations when appropriate.
- ❖ Identify those teaching fields for which special evaluation procedures and criteria are

necessary.

- ❖ Differentiate among four levels of performance as follows:
  1. Highly effective
  2. Effective
  3. Needs improvement or, for instructional personnel in the first 3 years of employment who need improvement, developing
  4. Unsatisfactory
- ❖ Provide for training and monitoring programs based upon guidelines provided by the department to ensure that all individuals with evaluation responsibilities understand the proper use of the evaluation criteria and procedures.

**C. Provide a staffing plan for each year of the charter term aligned with the school's projected enrollment as detailed on the cover page of this application.**

*Refer to Staffing Plan in Budget- Appendix A*

Costs for educational staff and administrators are forecast using the published pay scale in effect in the district where the school is located as a guide. The number of instructional personnel is in line with Florida's laws relating to class size.

- ❖ Teacher Salaries were derived at by using an average salary of \$39,500 teacher for Year 1, with a CPI of approximately 2% for every year thereafter.
- ❖ Paraprofessionals are budgeted at an average salary of \$ 18,000.
- ❖ Substitute teacher costs assumes that substitutes will be hired for \$10 days/full-time teacher at a rate of \$110/day.
- ❖ Administrative Salary includes a Principal at \$85,000 and Assistant Principal in years 3-5 at \$65,000
- ❖ Clerical and Administrative assistant salaries include those for Registrar \$23,000, Administrative Assistants \$28,081 and other Clerical personnel \$19,000
- ❖ Contract Services include professional fees paid to entities such as the Services and Support Provider, Speech Therapist, and other ESE service providers.
- ❖ As noted in the detailed Revenue Worksheet included in the application, the budget anticipates that 12% of students will be classified as ESE. There is room in the budget to modify the amount paid for ESE services under Miscellaneous and in the Budget Surplus, should the rate of contracted services for ESE and ESOL increase due to the various needs of the students once enrolled.
- ❖ Employee Benefits are calculated at a rate of 24% of all salaries (excluding contracted services). This includes health insurance costs, 401k contributions, tuition reimbursements, Worker's Compensation, and all mandatory federal and state employment taxes. As noted in the application, for employee insurance and benefits selection, the Governing Board has engaged the services of ADP Totalsource, a professional employer organization that provides human resource services to small and moderate size employers. The use of a professional employer organization allows the staff of the School to enjoy the same level of



benefits that are available to employees of large organization such as Fortune 500 companies (including health/dental/vision insurance and Retirement/401k plans).

#### **D. Explain the school's plan for recruitment, selection, and development.**

The qualifications to be required of the teachers and the potential strategies used to recruit, hire, train, and retain qualified staff.

**Recruitment** – The School will ensure that faculty members are certified, highly qualified professional personnel.

Accordingly, the School will:

- ❖ Recruit teachers through the State-sponsored, *Department of Education, Teach in Florida* website,
- ❖ Coordinate efforts to partner with postsecondary educational institutions to serve as host school for interns whenever possible, and
- ❖ Organize other efforts to attract in-field experts to serve as teachers in the various disciplines that require higher levels of academic content delivery.

Recruitment efforts will also include advertisements in local newspapers and on the school's website, presentations and fliers at local universities, school job fairs, and via word of mouth. Considerable effort will be taken during interviews to hire the most qualified candidates that cumulatively represent the diverse racial/ethnic background of the local community and county that we serve.

**Selection Process-** The school will look for candidates who demonstrate the following qualifications:

#### **Administration**

- ❖ Educational background: Master's Degree or higher
- ❖ Extensive administrative and teaching experience
- ❖ State of Florida Certification in Educational Leadership
- ❖ Vast experience in working with school or advisory educational boards
- ❖ Strong managerial capabilities
- ❖ Knowledge of the needs of the student population served by the School
- ❖ Positive evaluations from previous administrative position
- ❖ Letters of recommendation
- ❖ Excellent communication skills

#### **Faculty/Staff**

- ❖ Educational background: Bachelor's Degree or higher in field
- ❖ State Certification for the required position
- ❖ Excellent presentation and interpersonal skills
- ❖ Satisfactory recommendation and/or evaluations from previous employer

- ❖ Personal characteristics, knowledge, and belief in the school's mission
- ❖ An ability and motivation to work as part of a team in a small-school setting with parental involvement
- ❖ References/Letters of Recommendation

**Hiring Process** - The School's Governing Board will appoint a screening committee to recruit, interview and recommend to the board qualified candidates for Administrative positions, as needed. This committee may include current charter school administrators, employees of the organization, current board members and ESP personnel. Based on the recommendations of the committee, the Board conducts final interviews of the most qualified candidates and hires the Principal and any assistance principals (as the need arises).

The Principal, once hired, recruits teachers and may appoint a school-based committee to screen highly - qualified and certified teachers. This committee develops an interview questionnaire for specific positions, conducts initial screening interviews and makes recommendations to the principal. The principal reviews recommendations, conducts final interview, and makes all final hiring decisions within the scope of the budget, as approved by the Governing Board.

The school will not employ an individual to provide instructional services if the individual's certificate or license as an educator is suspended or revoked by this or any other state. The school agrees to fingerprint all employees as required by Section 1012.32, F.S., all employees agree to background checks, and drug-screening. The School will adhere to the antidiscrimination provisions of s. 1000.05, Florida Statutes. Furthermore, the school will not discriminate based on actual or perceived disability, gender, nationality, race or ethnicity, religion, sexual orientation in the hiring of its employees.

**Employee Evaluations**- In compliance with s. 1012.34, F.S., instructional personnel evaluations must, at minimum, be based on the following components:

**1. Performance of students\*** – in accordance with s. 1012.34, F.S., *At least* one-third of a performance evaluation will be based upon data and indicators of student performance. This will include growth or achievement data of the teacher's students.

\*Student learning growth will be assessed annually and measured by statewide assessments using performance standards adopted into State Board Rule for courses beginning in 2015-16. For courses/subjects not measured by statewide assessments, and courses with statewide assessments without a state-adopted growth model, the school will abide by the district's adoption of either all, some or none of the results of statewide assessments in the performance of students component. (s. 1012.34, F.S.)

**2. Instructional practice**- *At least* one-third of the performance evaluation will be based upon instructional practice. Evaluation criteria used when annually observing classroom teachers, as defined in s. 1012.01(2)(a), excluding substitute teachers, will include indicators based upon each of the Florida Educator Accomplished Practices (FEAPs) adopted by the State Board of Education.

For instructional personnel who are not classroom teachers, evaluation criteria will be based upon indicators of the Florida Educator Accomplished Practices (FEAPs) and may include specific job expectations related to student support.

**3. Other indicators** –the remainder of a performance evaluation may include, but is not limited to, professional and job responsibilities as those recommended by the State Board of Education and/or identified by the approved plan, peer reviews, objectively reliable survey information from students and parents based on teaching practices that are consistently associated with higher student achievement, and other valid and reliable measures of instructional practice.

Accordingly, the school will implement the FCPCS Charter School Evaluation System for Classroom Teachers and Other Instructional Personnel in alignment with the Florida Educator Accomplished Practices (FEAPs) and in compliance with s.1012.34, F.S.

All teachers will be formally evaluated on an annual basis. Newly hired teachers (new to the district and/or new to the profession) will be formally evaluated at least twice in the first year of teaching and will be under a probationary contract. All personnel must be fully informed of the criteria and procedures associated with the evaluation process before the evaluation takes place. Instructional personnel and administrative personnel who have been evaluated as less than effective must participate in professional development programs as part of the improvement prescription (s. 1012.98, F.S.)

The CWT (Classroom Walk -Through) Program will be used frequently to provide feedback on objective - setting, grade level appropriateness of lessons, appropriate higher-level thinking strategies and appropriate use of texts and materials. Instructional strategies, classroom management skills, and engagement of learners in the classroom will also be observed and teacher performance will be evaluated as a means to inform instruction and provide for professional growth opportunities.

Non-instructional staff, such as clerical staff will also be evaluated and receive feedback on their performance via in-house assessment tools and individual conferences with the principal or designee.

The evaluation systems for school instructional personnel must:

- ❖ Be designed to support effective instruction and student learning growth, and performance evaluation results must be used when developing district and school level improvement plans.
- ❖ Provide appropriate instruments, procedures, timely feedback, and criteria for continuous quality improvement of the professional skills of instructional personnel and school administrators, and performance evaluation results must be used when identifying professional development.
- ❖ Include a mechanism to examine performance data from multiple sources, including opportunities for parents to provide input into employee performance evaluations when appropriate.

- ❖ Identify those teaching fields for which special evaluation procedures and criteria are necessary.
- ❖ Differentiate among four levels of performance as follows:
  1. Highly effective.
  2. Effective.
  3. Needs improvement or, for instructional personnel in the first 3 years of employment who need improvement, developing.
  4. Unsatisfactory.
- ❖ Provide for training and monitoring programs based upon guidelines provided by the department to ensure that all individuals with evaluation responsibilities understand the proper use of the evaluation criteria and procedures.

**Staff Development Plan** - In setting high expectations for both students and teachers, the School will be committed to maintaining the level of high quality instructors by implementing a comprehensive professional development plan. The school will support the professional development needs of all professional staff by subsidizing college classes, facilitating the attainment of continuing education credits, and offering trainings.

Teacher training will be offered throughout the school year in a variety of forms. Select teachers will attend local, state and national conferences and serve as trainer to the remainder of the staff upon return to the School. Appropriate and relevant school wide training will occur on teacher planning days as well as on early release dates. All staff will participate in school-initiated and other relevant and necessary workshops for professional development, and a member of the administrative team will coordinate, assist and monitor the staff development process. In-house workshops and meetings will be held monthly by administrators and may occur as often as biweekly through team leaders, in order to facilitate support, encourage communication, allow for team planning, and troubleshoot concerns and needs.

All Staff will be offered, at minimum, the following school-site and district-based trainings:

- ❖ [Curriculum Implementation by Subject/Specialty](#) – Teachers will participate in school-wide trainings and individual department trainings throughout the school year related to curriculum implementation, Florida Standards and FSA implementation - These include but are not limited to: *Horizontal and Vertical team planning, CollegeBoard's SpringBoard Training, Implementing Florida Standards in English/Language Arts and Mathematics instruction.*
- ❖ [Comprehensive Research-Based Reading Plan](#) Implementation and Instructional Reading Strategies Across The Curriculum
- ❖ [Differentiated Instruction](#) – This training teaches teachers and coaches how to differentiate and individualize instruction in order to create effective targeted instructional lessons and tutoring to increase student achievement and maximize instructional time.
- ❖ [Data-Driven Decision-Making](#) – Administrators and staff learn how to analyze, extrapolate and disaggregate school data from a variety of sources and to use this data to create effective school improvement plans and increase student achievement.

- ❖ [PS RtI MTSSS Framework](#) – Staff learn to create RtI Leadership team that utilizes the Problem-Solving (PS) model to meet the academic and behavioral needs of all students.
- ❖ [Technology for the Next Generation](#) – Staff will participate in hands-on technology workshops to learn how to integrate technology into the classroom. The purpose is to ensure schools are growing with technology to ensure students and teachers are prepared for the expectations of the 21<sup>st</sup> century and national technology standards.
- ❖ [Promethean Board Trainings](#): Beginner/Intermediate
- ❖ [Safety and Security](#) – Safety and security training will instruct staff on daily safety procedures, and how to prevent and protect the school and students, to handle emergency situations, and to recognize potential threats in accordance with the school safety plan.

**The professional development plan for administrators** will encompass both internal and district-based in-service trainings. Administrators may also participate in professional development conducted through: the National Association of Secondary School principals; the National Association of Elementary School Principals; the Southern Association of Colleges and Schools/AdvancEd; Association for Supervision and Curriculum Development; and state trainings.

At a minimum, administrators will be encouraged to participate in the following professional development trainings and conferences:

- ❖ [Florida Annual State Charter School Conference](#) - administrators will attend state conference on an annual basis.
- ❖ [Clinical Educator Training](#) –This training provides quality support for developing administrators for the classroom or other educational environments such as the student services area. The Clinical Educator Program is designed to assist experienced educators as they exercise the very critical task of supporting and mentoring developing professionals in a variety of settings. This course helps develop skills for coaches and mentors in a formative observation, clinical supervision, feedback skills, and professional development planning for increased instructional effectiveness. The Florida Performance Measurement System's formative and summative processes are incorporated.
- ❖ [Teacher Formal Observation for Principals](#)- Training is provided by the Florida Consortium of Charter Schools
- ❖ [Classroom Walk-through Training](#) - Provides school leaders with strategies and tools to effectively structure classroom visits and follow-up reflection. Reflective thinking about one's practice provides an effective strategy for change and improvement by fostering a process of communication between the instructional leaders and the teacher to increase the focus on student achievement. The process provides a powerful strategy for increasing student achievement; a strategy for classroom visits that focuses on teaching and learning; methodology for analyzing the classroom for feedback purposes, and the use of reflective conversation for providing feedback.

- ❖ [Budget Training for Administrators](#) – This training addresses school budgeting as it pertains to both the school’s operating budget and internal accounting policies and procedures, *Financial and Program Cost Accounting and Reporting for Florida Schools* (Redbook) requirements, and checks and balances to ensure a sound budget.
- ❖ [Master Scheduling for Administrators](#) – Administrators are trained on creating an efficient and effective master schedule that meets the national, state and district course requirements, is financially sound, and that meets class size requirements.
- ❖ [Developing the School’s Improvement Plan](#) – This training assists school administrators to develop a sound and effective school improvement plan to ensure an equitable and high-quality school improvement plan. This process includes data analysis, goal-setting, budget planning, professional development planning and reflective practices.
- ❖ [Principal Chat Sessions](#) – Charter School Administrators meet by level (secondary, elementary) to go over pertinent topics and to share best practices. These sessions include curriculum development, standards implementation, scheduling, educational changes, innovative programs, and more. Experienced administrators share their best practices for using student achievement data with newly appointed assistant principals.

**Retention of Staff:** The School wishes to provide the best benefits and employee services possible. Our experience has shown that when employees deal openly and directly with supervisors, the work environment can be excellent, communications can be clear, and attitudes can be positive. We believe that the School will amply demonstrate their commitment to employees by responding effectively to employee concerns.

A number of the programs (Social Security, workers' compensation, and unemployment insurance) cover all employees in the manner prescribed by law. Additionally, the school will provide a wide range of benefits such as Flexible Benefits Plan; Direct Deposit; Retirement/401(k) Savings Plan; Bereavement Leave; Dental Insurance; Family Medical Leave; Financial Counseling; Health Insurance; Holidays; Life Insurance; Long-Term Disability; Sick Leave; Vision Care Insurance to ensure the retaining of qualified and capable staff. These fringe benefits are reflected in the budget – See Appendix A.

Other programs include:

[Educational Assistance/Tuition Reimbursement:](#) The School recognizes that the skills and knowledge of its employees are critical to the success of the institution. The educational assistance program encourages personal development through formal education so that employees can maintain and improve job-related skills or enhance their ability to compete for reasonably attainable jobs within the School. The following criteria will be used for Tuition Reimbursement for Full-time Certified Teacher Employees

[Employee Assistance Program:](#) The School cares about the health and well-being of its employees

and recognizes that a variety of personal problems can disrupt their personal and work lives. Through the Employee Assistance Program (EAP), the school will provide confidential access to professional counseling services for help in confronting such personal problems as alcohol and other substance abuse, marital and family difficulties, financial or legal troubles, and emotional distress

[Flexible Spending Account \(FSA\)](#): A Flexible Spending Account (FSA) program that allows employees to have pre-tax dollars deducted from their salaries to pay for eligible out-of-pocket expenses. The pre-tax contributions made to the FSA can be used to pay for predictable non-reimbursed health care expenses and dependent care expenses during the plan year. Through the FSA program, staff can reduce taxable income without reducing real income, in order to keep more of the money they earn.

[Support for Beginning and Struggling Teachers](#): Observation of new and struggling teachers by veteran teachers and support strategies will be implemented as applicable. A new educator support system format will also be used as a means to offer support to beginning teachers, through the assigning of a willing mentor, who will be assigned for struggling and/or beginning teachers.

## Section 11: Education Service Providers

**If the school intends to enter into a contract with an Education Service Provider (ESP):**

**A. Describe the services to be provided by the ESP.**

The ESP's services include assistance with facilities design, staffing recommendations and human resource coordination, curriculum development, research and data updating, sponsor relations and reporting, program marketing, and bookkeeping, budgeting, and financial forecasting, provided to the Governing Board for its oversight and approval.

**B. Provide a draft of the proposed contract between the school and the ESP including, at a minimum, proposed services, performance evaluation measures, fee structure, renewal and termination provisions, and terms of property ownership (real, intellectual and personal).**

A sample contract that would be negotiated between the School and the ESP is included herein as *Appendix D- Sample ESP Agreement*.

Additionally, the board will conduct a performance evaluation of the ESP on an annual basis to measure the service levels provided by the organization. The evaluation is grouped by area or specialty of service provided by the ESP and using a rating scale ranging from 1 (unsatisfactory) to 5 (highly effective). The Boards reviews this evaluation as a means of determining service improvement, satisfaction with services and ESP contract renewal.

**C. Unless the ESP is the parent non-profit organization, explain why the ESP was selected, including what due diligence efforts were conducted to inform the selection and how the relationship with the ESP will further the school's mission.**

The Board analyzed data regarding several ESP's currently working with charter schools in Florida and concluded that the ESP chosen offered the most competitive price and had a proven track record of success.

The ESP is one of an affiliated group of charter school service and support entities, which compose one of Florida's longest serving and most successful charter school service and support organizations. Currently working with over 120 charter schools, in Florida and throughout the country, the ESP's mission is to facilitate the vision of the School's governing board by providing the services and support necessary to allow each school to fulfill its mission.

The ESP was selected for the following reasons including, but not limited to:

- ❖ The company is staffed by professionals and educators with extensive knowledge of and experience with Florida Charter Schools.



- ❖ The president of the ESP, Fernando Zulueta, is a founding Board Member of the Florida Consortium of Charter Schools, and a Board Member of The National Alliance for Public Charter Schools. Mr. Zulueta has received numerous awards for his work with charter schools including the “Cervantes Award” sponsored by Nova Southeastern University for significant efforts to support excellence in the education of Hispanic students.
- ❖ The ESP’s affiliated group serves the largest number of high-performing (HP) schools of any charter school service organization in Florida. (See evidence in Addendum C)
- ❖ The ESP’s affiliated group was the first charter school service and support entity in Florida to seek SACS/AdvancED accreditation for the schools it serves, and all of the schools it serves are either fully accredited or in the process of obtaining accreditation. For example, Somerset Academy, Inc., one of the charter school networks serviced by the ESP, was the first charter school system in the Nation to receive District Accreditation from SACS/AdvancEd. Mater Academy, Inc., another charter school network serviced by the ESP, was also awarded District Accreditation from SACS/AdvancED.
- ❖ The White House’s College Opportunity Agenda & the Harvard Graduate School of Education has invited the administration of Mater Academy Charter Middle/High, a charter school serviced by the ESP, to be part of a select gathering of thought leaders and decision makers focused on increasing access to college for all Americans. The school was presented with an Inspiration Award from the College Board for being one of the three most inspiring secondary schools in America.
- ❖ The exemplary academic performance and fiscal soundness achieved for its charter school clients by this service and support organization has resulted in 15-year charter renewals for all schools which have had initial contracts completed. (see evidence in Addendum C)

**D. Explain the ESP’s roles and responsibilities for the financial management of the proposed charter school, if applicable, and the internal controls that will be in place to guide this relationship.**

The ESP will conduct general accounting services including bookkeeping, purchasing support, payables, asset management, budget preparation, cash flow analysis, and preparation of interim financial statements and assistance with the work of the school’s independent certified auditor. The school principal/administrator is responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The ESP, contracted by the board, will work with the school principal to provide financial forecasting services to the Governing Board for its oversight and approval.

The principal will prepare a school-site budget, report at least quarterly to the Governing Board on the progress of the site-based budget. The ESP will assist the Board and the principal in developing a budget that will be supportive of an optimal educational experience for students, while maintaining fiscal soundness and accountability. The principal maintains authority to make the hiring and spending decisions, which affect the budget. The ESP’s role is to monitor the budget and advise the school and Board on how to remain fiscally sound.

Accounts- State funds are received by the district/fiscal agent. The district/fiscal agent then wires the funds directly to the school's account. The ESP does NOT receive said funds. The ESP will simply process school invoices relating to daily operations. The accounts payable clerk will code invoices per the "Red Book", verify the accuracy of the invoice, and send the invoice to the school principal for approval. The school's internal fund accounts will all be maintained at the school site under the direction of the school administrator. These accounts will be reconciled monthly by the school treasurer.

**E. Unless the ESP is the parent non-profit organization, explain how the governing board will ensure that an "arm's length," performance-based relationship exists between the governing board and the ESP.**

The Governing Board will ensure that an "arm's length " performance-based relationship exists between the governing board and the ESP as described in the questions above. The ESP is hired by the Board of the non-profit organization that governs the charter school to perform specific duties, at the discretion of the Board. The ESP does not manage the day-to-day operations of a school, but rather provides "back office" support for the Board through a team of individuals with expertise in the areas of business, law, facilities, quality assurance, strategic planning and development, and governmental compliance. The ESP charges a flat annual fee per student enrolled at the school.

The ESP was established as a for-profit entity, similar to most organizations or vendors that provide services to public school districts and other charter schools (i.e. law firms, accounting firms, software companies, speech therapy agencies, educational materials vendors, uniform companies, etc.).

The Boards annually evaluates the ESP, as described above, and determines continuation and renewal of services based on the ESP's performance. The ESP is hired by the Board to provide certain services, which support the operations of the school. The principal, as the leader, is the individual responsible for the day-to-day operations of the school. Both the ESP and the principal report to the Governing Board, which has the ultimate authority to hire and fire them. Although the ESP may provide support and guidance to principals, it does NOT hire these individuals. They are hired and report directly to their Governing Boards. The ESP does not sign off on annual performance evaluations for principals or staff.

The ESP does not establish or implement a school's curriculum. The ESP does, however, assist the Board and the school in developing their own curriculum by providing them with the resources and tools for research and development, strategic planning, and sharing of best practices of other successful charter schools.

**F. Provide a summary of the ESP's history, including its educational philosophy and background and experience of senior management.**

Academica is one of the Nation's most experienced and successful charter school service and

support organizations. Founded in 1999 on the principle that each charter school is a unique educational environment governed by an independent board of directors that best knows the right path for its school, it is Academica's mission is to facilitate that governing board's vision. Academica has a proven track record of developing growing networks of high performing charter schools. (See Addendum C).

As one of the longest-serving and successful charter school service and support organizations in the nation, the company serves more than 120 charter schools in Florida, California, Nevada, Texas, Utah, and Washington D.C. providing educational programs from pre-kindergarten through high school.

In Florida, Academica schools have been recognized on a local, state, and national level for their achievements. For example, the Somerset Academy and Mater Academy Schools were recently designated by the Southern Association of Colleges & Schools (SACS) as the first fully accredited charter school systems in the United States.

Further, International Studies Charter High School was ranked #1 in the state of Florida and #13 in the nation as one of the "Best High Schools" by U.S. News & World Report and Newsweek magazines and, this year. The Advanced Placement® participation rate at International Studies Charter High School is 100 percent. It was awarded a Gold Medal based on its performance on state assessments and college readiness. Academica-serviced high schools represented 5 out of the top 25 schools while 14 Academica-serviced schools were ranked overall. Last year, two Academica-serviced schools were 2014 National Blue Ribbon Award honorees: Doral Performing Arts & Entertainment Academy and Mater Gardens Academy. Additionally, the Somerset and Mater Academy schools earned District accreditation from the Southern Association of Colleges & Schools (SACS) -- the first, and only, fully accredited charter school systems in the United States. On average, Academica's charter schools earned a letter grade of "A" during the 2014 testing year from the Florida Department of Education.

A president of the ESP, Fernando Zulueta, is a founding Board Member of the Florida Consortium of Charter Schools, and a Board Member of The National Alliance for Public Charter Schools. Mr. Zulueta has received numerous awards for his work with charter schools including the "Cervantes Award" sponsored by Nova Southeastern University for significant efforts to support excellence in the education of Hispanic students.

**G. Provide a complete list of other charter schools the ESP operates or previously operated using Addendum C (Form IEPC-M1A).**

*Please see attached Addendum C*

## Section 12: Human Resources and Employment

### A. Explain the school's compensation plan, including whether staff will be publicly or privately employed.

The School will be a not-for-profit, private employer, and will not participate in the Florida Retirement System. Full time, salaried employees will be entitled to Health Insurance and other benefits as detailed below. For employee insurance and benefits selection, the Governing Board has engaged the services of ADP Totalsource, a professional employer organization that provides human resource services to small and moderate size employers. The use of a professional employer organization allows the staff of the School to enjoy the same level of benefits that are available to employees of large organization such as Fortune 500 companies (including health/dental/vision insurance and Retirement/401k plans). More information on ADP is found on [www.adptotalsource.com](http://www.adptotalsource.com).

The proposed school will use its Governing Board's adopted performance-based salary schedule for instructional personnel and school administrators, in accordance with s. 1012.22(1)(c) relating to *Compensation and Salary Schedules*. The Board's plan includes a base salary schedule for classroom teachers, other instructional personnel, and school administrators in which annual adjustments are based on performance as follows:

- ❖ An employee who is "**highly effective**," as determined by his or her evaluation, would receive a salary increase that must be greater than the highest annual salary adjustment available to that individual through any other salary schedule adopted by the board
- ❖ An employee who is "**effective**," as determined by his or her evaluation, would receive a salary increase between 50-75 % of the annual salary increase provided to a highly effective employee.
- ❖ An employee who is in "**need of improvement (or developing)**" or is "**unsatisfactory**," as determined by his or her evaluation would not be eligible for a salary increase.

Such adjustments will be in addition to the base salary schedule that is not a bonus and becomes part of the employee's permanent base salary and shall be considered compensation under s.121.021(22).

Advanced Degrees will not be used for base salary calculations, but may be used for supplements. Supplements will be annual additions to the base pay, but will not be not part of the continuing base salary.

**B. Describe the proposed personnel policies and procedures to which staff will be required to adhere, including expectations for participation in the school's professional development program. If personnel policies and procedures have not been developed provide a clear plan, including timeline, for the development and approval by governing board.**

**The school will adhere to all antidiscrimination provisions of section 1000.05, F.S.** The school will not discriminate based on actual or perceived disability, gender, nationality, race or ethnicity, religion, sexual orientation in the hiring of its employees. All faculty and staff members employed by the School will possess the personal characteristics, knowledge base of and belief in the educational and curriculum design as described in this proposal, as well as an ability and motivation to work as part of a team with parental involvement. The School will look for personnel who bring with them a sense of enthusiasm and commitment as well as a strong belief in and understanding of the charter school concept.

Employees are expected to observe high standards of job performance and professional conduct. When performance or conduct does not meet standards, the School may terminate employment, or it may endeavor, if it deems appropriate, to provide the employee a reasonable opportunity to correct the problem. If, however, a corrective opportunity is given and the school determines that the employee has failed to make the correction, he or she will be subject to further discipline, including termination.

Under the No Child Left Behind Act (NCLB) of 2001, all teachers must be "highly qualified" to teach in the school. The definition of a highly qualified teacher includes meeting at least the following three criteria:

1. Having a bachelor's degree
2. Having State credentials or certificate
3. Demonstrated core academic subject matter competence

All instructional and non-instructional personnel who are hired or contracted to fill positions and members of the governing board of the school must undergo background screening as required by Section 1012.32, F.S. The school will be a safe, Drug-Free and Tobacco-Free Environment. All employees will be required to undergo background checks and drug-screenings.

Additionally, school employees will be required to adhere to The Code of Ethics of the Education Professional in Florida as defined in FAC Rule 6A – 10.080.

**Contracts:** Instructional personnel will receive either a probationary contract (for instructional personnel new to the profession or new to the district) or an annual contract (for personnel who have completed a probationary contract or are already under an annual contract). The contracts will provide just cause reasons, and process, for suspension or dismissal of instructional personnel during the term of an annual contract. At the end of the probationary contract, the Governing Board may choose to award or not award the Teacher an annual contract pursuant to §1012.335, Florida Statutes, with or without cause. Teachers will be evaluated in accordance with provisions of §1012.34, Florida Statutes.

The rules set forth below are not exhaustive and are intended to provide employees with illustrations and fair notice of what is expected from them. Obviously, however, such listing cannot identify every situation of unacceptable conduct and performance. Employees should be aware that conduct not specifically listed below, but which adversely affects or is otherwise detrimental to the interests of the school, to students, or to other employees, may also result in disciplinary action.

### **Probation Period**

Pursuant to Florida Statute, Section 1012.335, all instructional personnel will be issued a probationary employment contract for a period of one school year upon initial employment in the school.

### **Voluntary Termination**

The School will consider an employee to have voluntarily terminated or abandoned his or her employment if an employee does any of the following:

- ❖ Elects to resign from the school.
- ❖ Fails to return from an approved leave of absence on the date specified by the school.
- ❖ Fails to return to work without notice to the school for three (3) consecutive days.

### **Involuntary Termination**

The School expressly reserves the right to discharge employees for cause, but without being in violation of the laws of the State of Florida and the United States of America. The School assures thorough, consistent, and even-handed termination procedures. Terminated employees will receive all earned pay to the next regular pay period. An employee may be terminated involuntarily for any reason not prohibited by law, including a leave of absence in excess of 180 days, incompetency, misconduct, or other violations of the school's rules of conduct for employees. Involuntary termination, other than for an administrative reason or abandonment of employment, will result in forfeiture of all earned accrued compensation, other than as required to be paid by law.

Job Performance: Employees may be disciplined/discharged for poor job performance, including but not limited to, the following:

- ❖ Below-average work quality or quantity
- ❖ Poor attitude or lack of cooperation
- ❖ Excess absenteeism, tardiness, or abuse of break or lunch privileges
- ❖ Failure to follow instructions or procedures
- ❖ Failure to follow established safety/security procedures

Additionally, school employees will be required to adhere to The Code of Ethics of the Education Professional in Florida as defined in FAC Rule 6A – 10.080.

**Misconduct:** All school instructional personnel will be required to adhere to the Principles of Professional Conduct for the Education Profession in Florida as defined in FAC Rule 6A-10.081. Violation of any principles detailed therein shall subject the individual to revocation or suspension

of the individual educator's certificate, or the other penalties as provided by law. In addition, any employee may be disciplined or discharged for misconduct, including but not limited to the following:

- ❖ Dishonesty;
- ❖ Insubordination;
- ❖ Theft;
- ❖ Discourtesy (to students, parents, peers, supervisors, etc.);
- ❖ Misusing or destroying school property or the property of another;
- ❖ Disclosing or using confidential or proprietary information without authorization;
- ❖ Falsifying or altering school records, including the application for employment;
- ❖ Interfering with the work performance of others;
- ❖ Harassing other employees or students;
- ❖ Being under the influence of, manufacturing, dispensing, distributing, using, or possessing alcohol or illegal or controlled substances on school property or while conducting school business or supervising students;
- ❖ Possessing a firearm or other dangerous weapon on school property or while conducting school business;
- ❖ Conduct which raises a threat to the safety and well being of the school, its employees, students, or property, including being charged or convicted of a crime that indicates unfitness for the job; and/or
- ❖ Failing to report to the school any charge or conviction under any criminal, drug, state or felony arrests. \*Employees must self-report within forty-eight (48) hours to appropriate authorities (as determined by district) any arrests/charges involving the abuse of a child or the sale and/or possession of a controlled substance. Such notice shall not be considered an admission of guilt nor shall such notice be admissible for any purpose in any proceeding, civil or criminal, administrative or judicial, investigatory or adjudicatory. In addition, shall self-report any conviction, finding of guilt, withholding of adjudication, commitment to a pretrial diversion program, or entering of a plea of guilty or Nolo Contendere for any criminal offense other than a minor traffic violation within forty-eight (48) hours after the final judgment. When handling sealed and expunged records disclosed under this rule, school districts shall comply with the confidentiality provisions of Sections 943.0585(4)(c) and 943.059(4)(c), Florida Statutes.
- ❖ Failing to immediately report suspicion or knowledge of child abuse, abandonment or neglect. \*The school will follow the district policy regarding any and all procedures for reporting child abuse, abandonment or neglect. All employees who know or have reasonable cause to suspect that a child is an abused, abandoned, or neglected child, must report such knowledge or suspicion immediately to the Department of Children and Families Florida Abuse hotline. The employee should immediately notify the school principal and follow the districts procedures including completion of appropriate reporting documentation. Failure to immediately report suspected child abuse, abandonment, or neglect may result in termination by the school and criminal penalties by law enforcement authorities.

The school may proceed directly to a written reprimand or to termination for misconduct or

performance deficiency, without resort to prior disciplinary steps, when the school deems such action is appropriate. If an employee is recommended for dismissal by the principal of the school, the principal will propose such dismissal at a meeting of the Board of the School. The employee shall have the right to contest the dismissal at the board meeting and present testimony or evidence in connection with the dismissal action.

### **Professional Development**

In setting high expectations for both students and teachers, the School will be committed to maintaining the level of high quality instructors by implementing a comprehensive professional development plan. The school will support the professional development needs of all professional staff by subsidizing college classes, facilitating the attainment of continuing education credits, and offering trainings.

Teacher training will be offered throughout the school year in a variety of forms. Select teachers will attend local, state and national conferences and serve as trainer to the remainder of the staff upon return to the School. Appropriate and relevant school wide training will occur on teacher planning days as well as on early release dates. All staff will participate in school-initiated and other relevant and necessary workshops for professional development, and a member of the administrative team will coordinate, assist and monitor the staff development process. The Educational Service Provider may also prepare staff development meetings in which the school may elect to participate. In-house workshops and meetings will be held monthly by administrators and may occur as often as biweekly through team leaders, in order to facilitate support, encourage communication, allow for team planning, and troubleshoot concerns and needs.

In addition to school wide professional development opportunities, faculty members will each complete an Individual Professional Development Plan (IPDP) as a means to document and identify areas for personal targeted professional growth, including the identification of strategies for obtaining specified goals, its' compatibility to ensuring the professional development exercise will serve to benefit the student, and a timeframe in which the staff development exercise should occur. All IPDPs will be approved by the Principal, or his/her designee, at such time the principal may elect to recommend additional recommended professional development that should occur within a given timeframe.

The principal or member of the administrative staff, together with the teacher, will commit to the IPDP, including the allocation of necessary resources for plan implementation, and observation of new/struggling teachers by veteran/mentor teachers to implement support strategies.



## Section 13: Student Recruitment and Enrollment

### **A. Describe the plan for recruiting students, including strategies for reaching the school's targeted populations and those that might otherwise not have easy access to information on available educational options.**

The School will make great efforts to reach families reflective of the demographic of the County. A comprehensive advertising and promotional plan will include the use print and online media – including minority and community periodicals -- to disseminate information about the school's educational program and open enrollment period. The goal is to reach parents by using various means of information delivery. Promotional flyers and/or postcards will be distributed via direct mail, penny-saver publications, and/or directly to community groups and churches to ensure that harder-to-reach families are aware of the school and their eligibility to apply for enrollment. This information will also be posted in local public facilities such as community centers, parks/recreation centers, libraries and other locations of public access as permitted by local regulations. In order to best reach out to the county's growing diverse population, informational materials will be available in multiple languages as needed.

The School will distribute press releases and/or public service announcements to various media outlets to promote the open enrollment period, open house and other essential details about the school and its programs. A banner will also be posted on site with relevant information.

Once opened, parents and community partners will be encouraged to inform family, friends, and their community groups about the School. Local elected officials and community leaders will be invited to visit the School. They will also be given an updated on the program's growth and asked to share open enrollment information with their constituents through their newsletter and upcoming community meetings.

Current publications and websites that Somerset Academy, Inc advertises/or is featured in, includes:

- ❖ Broward Family Life
- ❖ South Florida Parenting
- ❖ South Florida Sports and Activities
- ❖ New Times Broward
- ❖ Sun Sentinel Educational Edition
- ❖ Greatschools.org

### **B. Explain how the school will achieve a racial/ethnic balance reflective of the community it serves or with the racial/ethnic range of other local public schools.**

Pupils will be considered for admission without regard to ethnicity, national origin, gender, or achievement level. The school expects to achieve diversity reflective of the community. The school's promotional plan aims to reach a broad audience and, accordingly, all racial/ethnic

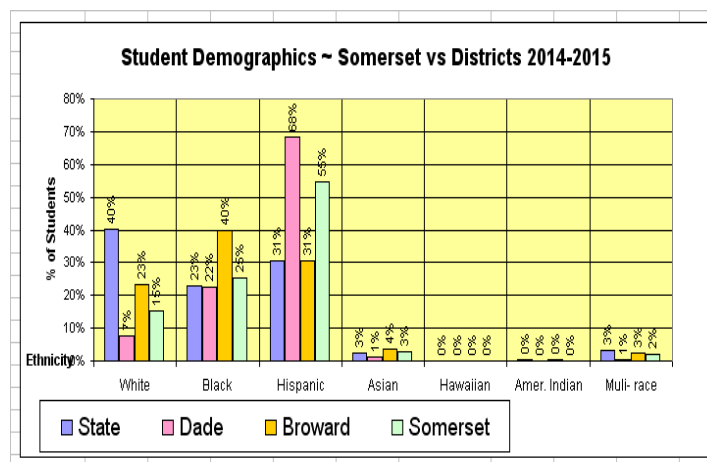
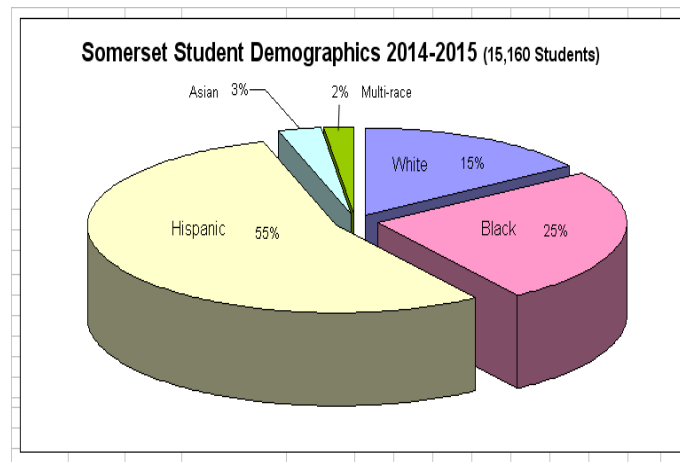
groups within it. By disseminating information in multiple languages to various media -- including minority and community periodicals, and postcard mailers delivered directly to residential addresses in various communities, the racial/ethnic balance of the School should be equivalent to that of public schools within the County.

Informational meetings will be held in a variety of community forums, to ensure that a diverse set of families are reached and given the opportunity to learn about the educational opportunity at the School. The governing board and administrators will also work with diverse community groups to seek assistance in disseminating information.

Somerset Academy's currently operating in Broward County serve a very diverse population of students and families reflective of their respective communities as noted in the chart below, which is based on the 2013-2014 school year:

| School                                                               | School ID | Free/Reduced Lunch | Minority Rate | Title I |
|----------------------------------------------------------------------|-----------|--------------------|---------------|---------|
| Somerset Academy                                                     | 5141      | 31                 | 90            | NO      |
| Somerset Academy Middle School                                       | 5151      | 33                 | 88            | NO      |
| Somerset Academy High School                                         | 5221      | 40                 | 87            | NO      |
| Somerset Arts Conservatory                                           | 5396      | 39                 | 80            | NO      |
| Somerset Academy (Miramar Campus)                                    | 5405      | 57                 | 93            | YES     |
| Somerset Academy Middle School (Miramar Campus)                      | 5406      | 65                 | 95            | YES     |
| Somerset Academy Miramar South                                       | 5054      |                    |               | NO      |
| Somerset Academy (Davie)                                             | 5211      | 45                 | 57            | NO      |
| Somerset Academy East Preparatory                                    | 5391      | 78                 | 96            | YES     |
| Somerset Academy Hollywood Pompano North                             | 5387      | 81                 | 86            | NO      |
| Somerset Academy Village                                             | 5004      | 94                 | 90            | YES     |
| Somerset Academy Village Charter Middle School                       | 5002      | 91                 | 91            | YES     |
| Somerset Preparatory Academy Charter School at North Lauderdale      | 5003      | 97                 | 96            | YES     |
| Somerset Preparatory Academy Charter High School at North Lauderdale | 5006      | 97                 | 96            | NO      |
| Somerset Academy Neighborhood School                                 | 5021      | 75                 | 98            | YES     |
| Somerset Preparatory Academy Charter Middle School                   | 5441      | 73                 | 98            | YES     |
| Somerset Academy Hollywood Middle School                             | 5419      | 80                 | 80            | NO      |
| Somerset Academy Charter High School (Miramar Campus)                | 5007      | 76                 | 97            | NO      |
| Somerset Pines Academy                                               | 5030      | 65                 | 61            | YES     |
| Somerset Academy Pompano                                             | 5388      | 79                 | 78            | NO      |
| Somerset Academy Pompano Middle School                               | 5413      | 96                 | 91            | NO      |

Currently, Somerset Academy, Inc. caters to all ethnicities in a comparable way in each respective sponsoring District, as the charts below indicate:



**C. Describe the school's proposed enrollment policies and procedures, including an explanation of the enrollment timeline, criteria and/or any preferences for enrollment, and lottery process.**

**Admission Policy** - In accordance with federal and state anti-discrimination laws and in accordance with the Florida Educational Equity Act, Section 1000.05(2)(a), the School will not discriminate on the basis of race, ethnicity, national origin, gender, or disability against a student in its school admission process. An open admissions policy will be implemented wherein the School will be open to any student residing in the County. Any eligible student, as described in F.S. §1002.33(10), who submits an application (prior to the posted deadline) shall be considered, unless the number of applications exceeds the capacity of the program, class, grade level, or building. In such case, all applicants shall have an equal chance of being admitted through a random selection/lottery process. If the number of applications falls short of the established capacity, supplemental

registration periods may be held for the purpose of reaching student capacity.

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

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

In order to minimize any traffic impact caused by the school and ensure that the school is available to serve the residents of the neighborhood where the school is located, the Governing Board of the charter school may elect to limit the enrollment process to target students residing within a reasonable distance of the school as provided under Florida law.

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

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

subject to a random lottery, the racial/ethnic balance provisions, or any federal provisions.

Enrollment Timeline (Approximate Dates):

|                       |                                                                                                                                  |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------|
| May 15 <sup>th</sup>  | - Student Registration Begins                                                                                                    |
| May 30 <sup>th</sup>  | - Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted. |
| June 1 <sup>st</sup>  | - Second Registration Period Begins                                                                                              |
| June 15 <sup>th</sup> | - Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted. |

**D. Explain any student and/or family contracts that will be used as a requisite for initial and continued enrollment in the school. Describe if and how the school will enforce such contracts.**

As noted in the sample Parent Contract provided, through the contract, parents and students agree, as members of the school's family, to abide by all of the school rules and regulations. Through the contract, parents agree, as stakeholders in the school, to abide by all of the school rules and regulations. The sample parent contract stipulates various items that will be utilized in support of the child's education. For example, parental involvement in the educational process is a major initiative. Therefore, one of the stipulations of the contract is that parents willingly agree to hours of service as an investment in the child's education. Please see *Appendix E - Sample Parent Contract*. The School will provide various options to complete such volunteer obligation, in accordance with State law and detailed below.

The School shall implement parent/guardian contracts as provided by law. The school will work to resolve matters regarding the parent/guardian contract by: 1) setting up a parent/guardian conference (via telephone or in person) to discuss and work with the parent/guardian toward a mutually satisfactory resolution and/or 2) providing opportunities for parents/guardians to fulfill their responsibilities under the contract.

**E. Explain any other efforts to encourage parental and community involvement, if applicable.**

Parental and community involvement in the School is a fundamental and required part of the philosophy and operation of the School. The goal is to encourage parents to be active participants in their child's education, and give the community ownership of a high quality educational program, and teach children to be civic-minded and socially responsible. Parents and community members will have extensive opportunities for involvement in aspects of school operations. Through the parent/teacher group, Educational Excellence Advisory Council (EESAC), and other such committees, parent and community representation and decision making in the educational processes of the School is possible. Similarly, the administration will also require the faculty and

staff of the School to uphold a strong belief in and understanding of the charter school concept through the inclusion of parents in the educational process. Through open lines of communications, faculty and staff will also encourage parental involvement through such endeavors as follow:

- ❖ Parental Service Contracts – parents agree to volunteer with their child’s teacher and/or be involved in other ways in school activities.
- ❖ Educational Excellence School Advisory Council (EESAC)- This group will consist of school personnel, parents, students, local business, and community members. Members will be able to address and vote on pertinent school matters on a regular basis.
- ❖ Quarterly Parent/Teacher Conferences – hosted in the evenings at the School where parents can discuss topics that affect their children’s educational progress.
- ❖ Open houses, Career Fairs, Family Day - events held to recruit new students, maintain communication and involvement between the School and the surrounding community.
- ❖ School Website, Newsletters, and Event Calendar – updated regularly to disseminate information and maintain open lines of communication in the community.
- ❖ Community Service Projects – students, faculty and parents will participate in activities to help, give back to, and connect with, the community.
- ❖ PTSA – Parent Teacher Student Association coordinates extra-curricular events involving the community.

Parent Workshops on education-related topics, such as decision-making regarding school performance and student assessment needs will be offered. Parent/Teacher Conferences and the electronic grade book, will also encourage parents to be fully involved in the School’s operations and will promote parental partnerships in the educational process. Volunteer opportunities to complete parent participation hours (communicated through newsletters, the School website, schoolnotes.com, email and calls home) will be plentiful and yearlong. Some of these will include activities such as chaperoning field trips, assisting with class and community service projects, helping in the library, participating in Career Week and Family Day, and assisting with the School store.

### III. BUSINESS PLAN

#### Section 14: Facilities

##### If the site is not acquired:

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

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

**Size and Layout of Space:** The facility will have an adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency. The proposed K-5 school facility will include program elements such as traditional classrooms, art, science and computer labs, multi-media instructional areas, lunch / multi-purpose room, food prep areas, and indoor and outdoor activity spaces.

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

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

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

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

**Estimate of Costs -** These Budget projections in Appendix A have been derived from actual historical data from other comparable charter school facilities leased by the board, and from experienced charter school facilities developers, updated based upon widely-reported cost escalations for land and construction costs for the corporation's charter school programs.

**Lease of Facilities:** The amount assumes an average cost of \$900.00 per student station in the budget, with a 3% increase for CPI. This amount is comparable to that paid by several other charter schools with similar enrollment numbers which have opened recently. It is the intent of this proposed school to try to negotiate under similar terms when entering into new leases. The figures

are based on statistical expense data compiled from the applicant's other successful charter schools currently operating in Florida. The fees included are comparable to the average annual amounts paid by other charter schools with similar enrollment numbers. Lease payments will commence upon the taking of possession of the facilities by the School.

Long-term leasing provides to the School the ability for the School's Governing Board to focus on its core mission (education and educational programming), outsourcing the design, acquisition, permitting, financing, and construction of facilities to experienced entities in those markets, creating long-term guaranteed access to needed physical plant without the associated risks of ownership. The lease documents will provide that so long as the School is meeting its rent and other obligations, even the foreclosure of the property by the developer's lender will not affect the School's continuing rights to possession and use of the facilities under the lease.

**Utilities and maintenance cost** estimates are shown in the proposed budget and amounts are comparable to the average annual costs paid by other charter schools with similar enrollment numbers. Water and sewer bills are set at \$80.00/Classroom and electricity bills are set at \$2600.00/Classroom.

**Operations of Facility/Plant** includes Purchased Service - CAM (Custodial, fire and alarm, pest control), Property Insurance and Utilities.

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

The Governing Board will direct its ESP to bring to the Board a recommendation for a quality educational facility to be leased by the School.

**Projected Schedule**

|          |                                                                                         |
|----------|-----------------------------------------------------------------------------------------|
| Nov- Dec | Facility Search                                                                         |
| Jan      | Facilities Identification and Negotiations upon charter approval by Sponsoring District |
| Feb-July | Execute Lease/Conduct Maintenance and Repairs                                           |
| July     | Final Preparations of Facilities                                                        |
| July     | Conduct Final Facilities and Safety Inspections                                         |

The ESP has extensive experience in identifying facilities and facilities developers, and has successfully assisted other charter school applicants in securing state-of-the-art charter school campuses. The ESP works with reputable and experienced charter property developers, who have access to a network of financial institutions ready to commit the necessary capital for build-to-lease facilities. The developers have also demonstrated abilities in securing the necessary local governmental approvals for charter school purposes and required financing. They have relationships with award-winning design and engineering firms, as well as contractors with a track record of timely completion of excellent facilities meeting the needs of the School. For example, Mater Academy East Charter School's facility, a 6-month construction project, was awarded



“Outstanding Educational Design” and featured as the cover of *The American School & University Magazine*’s June 2006 issue.

**Safety, Permitting, and Inspections** - The facility will meet all requirements for educational facilities in accordance with 1002.33(18)(a)(b) - the Florida Building Code pursuant to chapter 553, with the exception of SREF and state minimum fire protection codes pursuant to Section 633.028, F.S., as adopted by the County. The facility will meet all such requirements for education facilities, including but not limited to, restrooms, fire safety, campus security, air quality control, weather proofing, etc.

The School will participate in the Sponsor’s annual site compliance visits for the purpose of reviewing and documenting, as appropriate, compliance with applicable health and safety requirements. Other inspection agencies may include inspections of kitchens and related spaces as well as Department of Labor and Employment to for OSHA compliance. The School will show proof of the annual inspections prior to the first day of operations.

**D. Describe the back-up facilities plan.**

The School’s Governing Board expects to finalize negotiations with a potential landlord prior to charter contract negotiations with the Sponsor. If unsuccessful, negotiation will commence immediately with an experienced developer. The Governing Board will require periodic updates from its ESP concerning the progress that is being made in final identification of a suitable site and developer to acquire, construct and lease the facilities. In the event that issuance of the Certificate of Occupancy is for any reason not expected in a timely fashion, the School’s Governing Board intends to direct the ESP to locate alternative facilities options suitable for school use immediately for the Board’s review. The Governing Board will require periodic updates from its ESP concerning the progress that is being made in final identification of a suitable facility. Any such facility shall be zoned for educational use and contain the adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency.

**E. Describe the plan and methods the school will employ to comply with Florida’s constitutional class size requirements.**

The school plans to implement methods, which will ensure that is compliant with Florida’s laws relating to class size. For example, the school will ensure that the facilities it occupies are equipped with the number of classrooms needed to accommodate the necessary number of classes. In addition, the school’s Board will adopt annual budgets, which include sufficient certified teachers to achieve the student-to-teacher ratios, which are legally applicable.

## Section 15: Transportation Service

- A. Describe the school's plan for transportation, including any plans for contracting services. Your plan should discuss, to the greatest extent possible, the issues relevant to the school's transportation plans.**

The School's plan for transportation, including any plans for contracting services, will be pursuant to Florida's Charter School Legislation and consistent with the requirements subpart I.E. of Chapter 1006 and 1012.45, F.S. The School transportation plan will abide by applicable district, state, and federal rules and regulations. Accordingly, the School will ensure that transportation is not a barrier to equal access within a reasonable distance of the School, as required by section 1002.33, F.S. The School's plan for providing reasonable and equitable transportation opportunities for all students is as follows:

**Parent Transportation Agreements:** The School's plans for contracting services, as described in Florida law, §1002.33(20)(c) F.S., provides that the governing body of the charter school may provide transportation through an agreement or contract with a private provider or with parents. The School will enter into agreements with the parents/guardians to provide transportation for their children as stipulated in the school's proposed parental involvement agreements wherein parents receive volunteer hours. The school believes that the time a parent can spend daily transporting the student (his or her child) to the school is a valuable opportunity for the parent and student to strengthen their bond and share information regarding the day's activities and events at the school.

**Ensuring Equal Access:** The school will ensure that transportation is not a barrier to equal access within a reasonable distance of the School, as provided in the Florida's Charter School Legislation. In the case transportation is needed and if the parent advises the School that there is a hardship, and he/she is unable to provide the transportation, the School will provide transportation within a defined reasonable distance. In such cases, the School shall be responsible for transporting all students in a non-discriminatory manner to and from the School who reside within a reasonable distance of the School or who otherwise are entitled to transportation by law. In these situations, the School may provide transportation by contracting with an independent private transportation provider approved by the Sponsor.

**Transportation for ESE Students:** The School may contract with a Sponsor-approved private transportation carrier to provide specialized transportation for students with disabilities based on their particular student needs and that which may be specified in a student's IEP. In such case, the School will provide the Sponsor the name and information of the Sponsor-approved private transportation firm.

**Private Providers:** Any private providers contracted by the School will be such providers who have been approved by the Sponsor as per the Sponsor's approved provider list. The School will comply with all applicable requirements of Fla. Stat. 1012.45 and review these rules and statutes at least

annually for any changes thereto in ensuring compliance with statutes and rules pertaining to the safety of transported students. The School will provide the Sponsor with the names and contact information of any and all contracted private providers in ensuring monitoring of compliance for the safe transporting of students.

## Section 16: Food Service

### A. Describe the school's plan for food services, including any plans for contracting services or plans to participate in the National School Lunch Program.

An organized meal service that meets local health, state and federal regulations will be offered at the school site. Nutritious meals will be provided in accordance with The Healthy, Hunger-Free Kids Act of 2010 and the USDA Dietary Guidelines of meal component and portion size requirements. The school will either prepare its own food in which case the school will have a food service preparation area with all of the necessary equipment for preparing and holding the food or the school will contract with a FDACS registered vendor to provide the food and equipment necessary for holding the food at required temperatures. All meals will be distributed to students using a point of sale accountability procedure.

Somerset Academy, Inc. is an approved Sponsor of the National School Lunch Program (NSLP) and therefore the School will participate in the free/reduced priced meal program. The School will be an approved site under Somerset Academy, Inc. NSLP Sponsorship and will provide free and reduced priced meals for eligible children. Eligible children are children from households with gross incomes within the free and reduced limits on the Federal Income Guidelines.

Schools have a Verification Plan that is implemented each school year. During the verification period, the confirmations of eligibility for free and reduced priced meal benefits under the National School Lunch Program are completed. Verification includes income documentation or confirmation that the child is included in a currently certified Temporary Assistance to Needy Families (TANF) assistance unit, SNAP, or Food Distribution Program on Indian Reservation (FDPIR). Verification efforts are not required for students who have been directly certified, homeless certified, and migrant certified or designated as a runaway youth. Directly certified students, migrant children, homeless and runaway youth are granted automatic eligibility for free meal benefits.

The School will process all necessary lunch applications; adhere to program operation and record keeping requirements; and use of the Florida Automated Nutrition System (FANS). The School will implement the following procedure for processing Free/Reduced Lunch Applications:

- ❖ Disseminate lunch applications to all students upon enrollment
- ❖ Collect lunch applications and determine applications, according to Florida Income Eligibility Guidelines, published in the Federal Register by Food & Nutrition Service, USDA;
- ❖ Enter determinations for each child into district mainframe or via direction provided by district;
- ❖ Provide students with notice of eligibility;
- ❖ Serve/Charge student lunches in accordance with determined eligibility;
- ❖ Submit claims for reimbursement within 30 days of the following month for each approved month of the school year once approved by the NSLP.

**Contracting Services** - The School may contract with an independent provider to prepare and

provide meals, or the school may prepare and serve the meals to students. If an independent provider is required, the school will solicit bids from registered vendors for food service. The private vendor selected by the school will prepare and deliver food to the school in accordance with standards established by the Florida Department of Professional and Business Regulations. The private vendor will be required to maintain and supply the school with equipment to hold the meals and daily records of all lunches served and current copies of inspection and insurance certificates.

**Lunch Area** - The school facility will include a lunchroom or, at minimum, a seating area that meets state nutritional and sanitation standards. The School agrees to have two satisfactory health inspections conducted on a yearly basis, by the State Department of Health, County Department, as required, to maintain Permit for Food Service.

## Section 17: Budget

- A. Provide an operating budget covering each year of the requested charter term that contains revenue projections, expenses and anticipated fund balances. The budget should be based on the projected student enrollment indicated on the cover page of the application.**

*See Appendix A – Operating Budget*

- B. Provide a start-up budget that contains a balance sheet, revenue projections, including source of revenues, expenses, and anticipated fund balance. The start-up budget must cover any period prior to the beginning of FTE payments in which the school will expend funds on activities necessary for the successful start-up of the school.**

### **Somerset Parks Academy Charter School**

#### **Start-up Budget**

|                           | February | March  | April  | May   | June  | Total  |
|---------------------------|----------|--------|--------|-------|-------|--------|
| Line of Credit / Grant ** | 25,000   |        |        |       |       |        |
| EXPENSES:                 |          |        |        |       |       |        |
| Administration Staff      | 2,500    | 3,500  | 3,500  | 3,500 | 3,500 | 16,500 |
| Marketing & Enrollment    |          | 2,500  |        | 2,000 | 500   | 5,000  |
| Computer/Printer          | 1,500    |        |        |       | 1,000 | 2,500  |
| Administrative Expenses   | 500      | 200    | 100    | 100   | 100   | 1,000  |
| TOTAL OPERATING EXPENSES  | 4,500    | 6,200  | 3,600  | 5,600 | 5,100 | 25,000 |
| Fund Balance              | 20,500   | 14,300 | 10,700 | 5,100 | -     |        |

\*\* The School will apply for a \$25,000 planning and design grant, as provided by the Charter School Implementation Grant Program. If awarded, the grant will assist the school with the start-up costs which will be incurred prior to the period when the school will begin to receive operational funding from the sponsor. In the event that the start-up grant is not awarded, the school can either use resources from its network or has identified a non-profit charter school lender that will provide a line of credit to support the opening expenditures.

**Start-Up Budget Revenue:** the school will apply for a \$25,000 planning and design grant, as provided by the Charter School Implementation Grant Program. If awarded, the grant will assist the school with the start-up costs, which will be incurred prior to the period when the school will begin to receive operational funding from the sponsor. In the event that the start-up grant is not awarded, the school has identified a non-profit charter school lender that will provide a line of credit to support the opening expenditures (*See Appendix G - Lender Commitment Letter*).

**Startup Budget Expenses:** The startup budget expenses as detailed above by object and function are based on the critical expenses for planning and program design and include: marketing efforts for 3 months prior to school opening; office materials and equipment and office computer; and professional services for staff recruitment and professional development.

**C. Provide a detailed narrative description of the revenue and expenditure assumptions on which the operating and start-up budget are based.**

*The budget narrative should provide sufficient information to fully understand how budgetary figures were determined.*

The school's budget forecast was developed using statistical data collected from over a decade's worth of operations at more than 100 charter schools successfully operating in Florida. Additionally, representatives of the charter applicant have attended state and district sponsored charter school budget training workshops in prior years. The data and methodology used to prepare the budget forecast is highly reliable. The majority of charter schools that developed budgets using this system completed the past school year with a budget surplus.

The budget contains the following sections to help the reader follow the assumptions presented in the budget:

**Budget Summary:** This section contains summary information of the overall budget including:

- ❖ Student projection, grades to be served, number of students per grade level, per student revenue based on the State provided revenue worksheet.
- ❖ Revenue- Calculates maximum gross revenue and budgeted state sources of revenue.
- ❖ Expenditure Summary Teacher Staff Summary – Contained in the expenditure section is information on the size and cost of the facility and illustrates the average class size, number of teachers, and salary benefits per teacher.

**Budget Detail:** The complete five-year budget is presented in this section. For the first year we budget enrollment at; expected, 75%, and 50% of expected enrollment. For the future years we budget our expected number, since the school has demonstrated viability with low enrollment early on.

- ❖ The revenues are calculated based on the number of students using the Revenue Worksheet provided by the state for each of the years budgeted. For each additional year, a revenue increase amount (1%) has been utilized.
- ❖ The expenditures are calculated based on a function of each line item. Each line item has a cost and a basis for the calculation. For example *Classroom Supplies and Equipment* are budgeted at \$45.00 per student while *Textbook and /or ebooks/Student Activities* are budgeted at \$185.00 per student.
- ❖ For salaries the total is presented from the Staffing Plan section for each function.

**Start up Budget:** The budgeted amounts of revenue and expenditures before the school's first fiscal year of operation are presented in this section. The school will apply for a \$25,000 planning and design grant, as provided by the Charter School Implementation Grant Program. If awarded, the grant will assist the school with the start-up costs, which will be incurred prior to the period when the school will begin to receive operational funding from the sponsor. In the event that the start-up grant is not awarded, the school has identified a non-profit charter school lender that will provide a line of credit to support the opening expenditures (*See Appendix G - Lender Commitment*

Letter).

**Startup Budget Expenses:** The startup budget expenses as detailed above by object and function are based on the critical expenses for planning and program design and include: marketing efforts for 3 months prior to school opening; office materials and equipment and office computer; and professional services for staff recruitment and professional development.

**Budget Monthly Years 1-5:** In these sections the annual budget is presented in a monthly format on a cash basis for each of the years of the charter. The ESP has negotiated payment terms with various vendors and the amounts shown follow the payment terms received.

**School Design:** In this section the number of classrooms and students is presented in four different formats along with the percentage of ESE, ESOL, and students qualifying for free and reduced lunch meals.

**Staffing Plan:** This section is broken out into three different areas;

- ❖ The first item is the assumptions used for calculating the benefits provided to each staff member.
- ❖ The second area is to provide the calculation for the number of staff members for each position.
- ❖ Next is the calculation of the pay amount times the number of positions for that function. In addition, benefits costs are calculated at the gross amount times the benefits rate from the first item.
- ❖ The average performance pay increase is budgeted at 2%

**All Charter School Calculator:** This section is from the Florida Department of Education Revenue worksheet based on the first calculation of the most recent FEFP. It is used to calculate the gross State Funding.

### **Operating Budget Revenue:**

The FTE Revenue forecast is based upon data provided by the Florida Department of Education and the sponsoring school district at informational meetings held by sponsors for new charter school applicants. The application includes a detailed Revenue Worksheet in *Appendix A*, which explains how revenue figures were derived.

The Transportation Reimbursement revenue was based on the assumptions provided in the budget notes therein.

The Lunch Program income is calculated based on an estimated percentage of F&R lunch from existing schools in the target area, plus an estimation of students paying for their own meals. The revenue and costs associated with the lunch program are detailed in the "Budget Detail" section of the budget.



**Capital Outlay:** An estimate of the Capital Outlay amount based on the \$50 million allocated for the 2015-16 school year. The amount is kept constant for each year of the budget. The school is a part of a district-accredited network.

### **Operating Budget Expenditures**

Expenses have been forecast using the statistical expense data compiled from over 100 successfully charter schools operating in Florida. The data is highly reliable. The more than 100 charter schools utilizing a budget using this system completed the 2014-2015 year with a budget surplus.

**Staff:** Costs for educational staff and administrators are forecast using the published pay scale in effect in the district where the school is located as a guide. The number of instructional personnel is in line with Florida Law for class size as it pertains to charter schools (see Staffing Plan in the budget).

#### **Instructional Staff- (Refer to Staffing Plan in Appendix A for further detail)**

**Teacher Salaries** were derived at by using an average salary of \$39,500/teacher for Year 1, with a CPI of 3% for every year thereafter.

**Teachers** include ESE or ESOL certified

**Paraprofessionals** are budgeted at an average salary of \$18,000/year

**Substitute teacher** costs assumes that substitutes will be hired for 10 days/full-time teacher at a rate of \$110/day.

**Pupil Personnel Services** includes an ESE Teacher/Coordination at \$42,000 a year

**Media Services** A Media Specialist is included as of Year 3 at the rate of \$41,000 a year

**School Administration** includes a Principal (Years 1-5), Assistant Principal (Years 3-5) and support personnel such as a Registrar and Administrative Assistant

**Additional staff** includes Business Manager, Food Service Workers, & Custodian

**Employee Benefits** are calculated at a rate of approximately 24% (see "Staffing Matrix" section of the budget for exact calculation) of all salaries (excluding contracted services). This includes health insurance costs, 401k contributions, Worker's Compensation, and all mandatory federal and state employment taxes. As noted in the application, for employee insurance and benefits selection, the Governing Board has engaged the services of ADP Totalsource, a professional employer organization that provides human resource services to small and moderate size employers. The use of a professional employer organization allows the staff of the School to enjoy the same level of benefits that are available to employees of large organization such as Fortune 500 companies (including health/dental/vision insurance and Retirement/401k plans).

**Contract Services** include professional fees paid to entities such as the Services and Support Providers for Contracted Professional Services (includes Therapists & other contracted instructional services). As noted in the detailed Revenue Worksheet included in the application, the budget anticipates that 12% of students will be classified as ESE. There is room in the budget to modify the amount paid for ESE services under Miscellaneous and in the Budget Surplus, should the rate of contracted services for ESE/ESOL increase due to the various needs of the students once enrolled.

**Instructional Materials** expenditures include Classroom Supplies and Equipment, Teacher Supplies, Textbooks and Student Activities budgeted at a per student rate. The budgeted amounts assume that the only revenue that the school will receive is FTE, and is therefore consistent with (and exceeds) the amount allocated to instructional materials under the categorical funding formulas used by the State of Florida.

**Instructional Technology** includes the leasing of computer equipment/Promethean boards and repairs of such, and educational software and electronic textbooks budgeted per classroom. In addition, the budget includes EduSoft Software and scanner and hardware maintenance. This amount assumes that the only funding received is FTE, and does not take account possible Implementation Grant funds.

**The ESP** fees are budgeted by services on a per student basis as follows: Instructional Services (Curriculum Planning, Research, Development and Evaluation) \$115.00, General Administration management \$225.00, Fiscal Services (Planning, Research, Development and Evaluation) \$110.00.

**Staff Development** is allocated at \$1000 per teacher to cover costs for workshops and other PD activities, including, but not limited to: Data-Driven Decision Making for Teachers and Administrators, Mission and Vision, Improving Individual Student Achievement and Continuous Improvement Process.

**Advertisement and Promotion** includes costs related to recruiting students and staff (i.e. printing of brochures, website production, and advertisements in local media outlets).

**Independent Financial Audit** (Fiscal Services) allocates \$8500.00 to the cost of the annual audit paid to an outside auditor. Cost was derived using amounts paid by schools of similar size to accounting firms that perform the Independent Audit.

**Food Services:** Lunch Program expense is based on current figures found in the affiliated charter schools. Somerset Academy, Inc. is already approved under the National School Lunch Program and is qualified to receive reimbursements. Since we are uncertain of the precise population (and number of free and reduced lunch meals to be served) we are unable to provide a more precise budgeted structure for food service. However, an estimated amount is provided in the “Budget Detail” section of the budget.

**Pupil Transportation Services** is calculated at \$235/bus per day with a 20% utilization rate identified in the budget.

**Operations of Facility/Plant** includes Purchased Service - CAM (Custodial, fire and alarm, pest control), Property Insurance and Utilities. The figures included are based on statistical expense data compiled from over 100 successfully managed charter schools currently operating in Florida. It is the intent of this proposed school to use this data as the threshold when planning for its new facilities. The fees included are comparable to the average annual amounts paid by other charter schools with similar enrollment numbers.

**Lease of Facilities:** The amount assumes an average cost of \$900 per student station in the budget. This amount is comparable to that paid by several other charter schools with similar enrollment numbers which have opened recently. It is the intent of this proposed school to try to negotiate under similar terms when entering into new leases.

**Maintenance of Plant:** Allocates \$1.50 per sq. ft. for repairs and maintenance of the facility. The amount listed is comparable to the average annual amounts paid by other charter schools with similar enrollment numbers and facility size.

The school has identified a non-profit charter school lender that will provide a line of credit to support the opening expenditures (*See Appendix G - Lender Commitment Letter*). If the school opens at 50% enrollment, debt repayment of this line of credit will be interest only for at least 3 years and the school will have the option to pay when funds are available.

**D. Explain how the governing board will monitor the budget, including a strategy for addressing revenue shortfalls due to lower than expected enrollment.**

The Board has the ultimate responsibility to ensure that the School's finances are managed properly. Accordingly, the Board will review and approve a preliminary annual budget prior to the beginning of the fiscal year. The ESP will work with the school Principal to prepare a school-site budget, which will include anticipated revenues and expenditures based on student enrollment. As part of its responsibilities, through a contractual agreement with the ESP, the ESP assists the Board and the Principal with the preparation and reporting of the School's finances including providing each school with quarterly reports which reflect budget vs. actual expenditures. The principal receives a monthly Profit and Loss statement from the ESP detailing expenditures in each of the budgeted categories to monitor spending throughout the year. This strategy allows for the principal and Board to make adjustments to expenses in anticipation of any possible shortfalls.

At minimum, the Board will meet quarterly to review all financial statements and budgets and approve revisions to the budget as necessary. In the event a financial recovery plan is necessary, the Board will monitor it and ensure such plan is appropriately maintained.

Professional audit services are allocated and will be used to verify and audit the financial revenues and expenditures of the School to ensure to the board that all funds have been allocated and used in accordance with generally accepted accounting standards, including internal controls, and will accurately represent the financial position of the school as well as the results of their operations and cash flows. Each year, the auditors are selected by the Board of Directors through an RFP process. In addition, the audit will confirm the operations of the schools and organization were properly conducted in accordance with legal and regulatory requirements, including Florida Statutes, and State Board of Education Rules.

**E. Provide monthly cash flow projections for the school's start-up period (i.e. from the date on which the application is approved to the beginning of the first fiscal year of operation) through the first year of operation.**

*See Appendix A- Monthly Cash Flow*

**F. Describe the school's fundraising plan, if applicable. Report on the current status of any fundraising efforts, including verification of any fundraising monies reported in the school's start-up or operating budgets.**

Fundraising will serve as a catalyst to further service the School's needs. Throughout the school year, the School will conduct fundraising activities to generate capital and to supplement the per pupil allocations. Examples of fundraising activities include Book Fairs, Yearbook Sales, Holiday Store, School Pictures, and a School Fair. The School may also apply for grants from national, state, and local foundations, as well as other sources for education grants, including the Charter School Implementation Grants. Specific grant sources will be determined, based on appropriateness and feasibility, by the school administration and Governing Board.

Additionally, the School will also receive a percentage of the sales made from school pictures, uniform sales, and yearbook sales. The School will also welcome and encourage sponsorship and donations from local business partners within the local community. This includes financial and in-kind donations that will promote the educational program from the benefit of the community. The school has no fundraising efforts to be reported at this time.

## Section 18: Financial Management and Oversight

### **A. Describe who will manage the school's finances and how the school will ensure financial resources are properly managed.**

The Governing Board has the ultimate responsibility to ensure that the School's finances are managed properly. The Board will contract with an Education Services Provider (ESP), which will assist the Board and the School Principal with the preparation and reporting of the School's finances.

The Board will review and approve a preliminary annual budget prior to the beginning of the fiscal year. The Principal of the School will prepare a school-site budget, which will include anticipated revenues and expenditures based on student enrollment. Each quarter, the Board will review the budget and make revisions, as necessary.

The Principal will manage the day-to-day operations and site-based finances, including expenditures and receivables. The Board will adopt a policy whereby the Principal will need to seek prior approval from the Board for expenditures over a pre-approved amount. The Principal will report at least quarterly to the Governing Board on the progress of the site-based budget and make recommendations and seek approval for large expenses. The Governing Board will oversee the Principal and remain responsible for all financial matters delegated to the Principal.

### **B. Describe the financial controls, including an annual audit and regular board review of financial statements, which will be employed to safeguard finances.**

The School has established financial procedures to further safeguard its finances. The Governing Board shall annually adopt and maintain an operating budget, retain the services of a certified public accountant or auditor for the annual independent financial audit and review, and will approve the audit report, including audit findings and recommendations. In the event a financial recovery plan is necessary, the Board will monitor it and ensure such plan is appropriately maintained. The Governing Board of the School will also review and monitor the financial statements of the School on at least a quarterly basis during regularly scheduled Board Meetings.

**Controls** - The Board of Directors is responsible for establishing and maintaining a system of internal controls in order to provide reasonable assurance that the school's assets are safeguarded against loss from unauthorized use or disposition, and that transactions are executed in accordance with the school's authorization and recorded properly in the financial records. Specifically, the Board has established controls in accordance with all applicable federal, state and local laws and in line with accepted industry standards and best practices regarding:

- ❖ Revenues, accounts receivable, and cash receipts
- ❖ Expenditures, accounts payable, and cash disbursements

- ❖ Budgeting and financial reporting
- ❖ Risk management
- ❖ School inventory & capital assets
- ❖ Student records
- ❖ Employment records

Standard procedures utilized to ensure sound internal accounting and a system of checks and balances include:

**General Accounting** - utilization of accepted state codification of accounts pursuant to the Financial and Program Cost Accounting and Reporting for Florida Schools in all transactions pertaining to its operations.

Internal accounting procedures for the School pertaining to receivables and disbursements are as follows:

For receivables, all cash payments will be logged, coded by source and deposited in a timely manner. Deposits are reconciled to cash receipt logs. Disbursements will be made only to approved vendors and must be appropriately authorized. Disbursement voucher packages are prepared at the School site and authorized by the School Principal. Disbursement vouchers are submitted to the ESP with appropriate supporting documentation to substantiate the nature, account classification, business purpose and amount. Disbursement vouchers are reviewed and approved by the Principal and the ESP. For internal accounts, all disbursements require two signatures. For operating and lunch accounts, disbursements require two signatures for any check in the amount of \$2,500 or above. Checks in the amount of \$25,000 or above require that one of the signatures be that of the Board Chair. Authorized signatures on checks are limited to the Chair of the Governing Board, the president, the School Principal/designee, ESP representative, and others, as approved by the Governing Board.

Bank statements will be reconciled on a monthly basis. The School will provide regular financial statements to the Sponsor including a statement of revenues and expenditures and changes in fund balances, prepared in accordance with generally accepted accounting principles. These will be provided on the dates required by the School Board in the charter school contractual agreement between the School and the Sponsor.

**Wire Transfers** - copies of all wire transfers (e.g., FTE funds, grants, charter school capital outlay) into the school's banking account(s) along with supporting documentation are maintained and recorded in the general ledger by journal entry.

**Internal Revenue Collection** - funds collected at the school (i.e., lunch monies, fundraisers, field trips) will be initially collected by designated school staff. These funds along with supporting documents are submitted to the Financial Manager whose responsibility is to record and prepare the deposit. All deposits will be prepared in duplicate; the original goes to the financial institution and the copy remains intact in the deposit book. A copy of the financial institution validated

receipt along with supporting documentation will be maintained.

**Capital Expenditures** - purchase orders are required for all capital expenditures and are pre-approved by the Executive Director, Principal, or Designee. Limits are set by the Board of Directors and may change as necessary. These purchase orders are prepared in duplicate with one going to the vendor and the other remaining at the school on file in the Accounting Office. Any purchase order totaling more than the limit as set by the Board of Directors requires Board action.

**Operational Checking Accounts** - all expenses related to the operations of the school are paid from the operating account. All operating expenditures are subject to the same approval processes as indicated for capital expenditures. All accounts are reconciled on a monthly basis and presented to the Board of Directors for review.

**Authorized Check Signers** - authorized signers on school accounts are limited to certain specified individuals as approved by the Board of Directors.

**Segregation of Duties relating to financial controls –**

The school principal/administrator will be responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The school's on-site administration/faculty and staff will report directly to the principal, who then reports to the Governing Board. The ESP, contracted by the board, will provide bookkeeping, and financial forecasting services to the Governing Board for its oversight and approval.

The Board, at minimum, will be responsible for:

1. reviewing and approving a preliminary annual budget prior to the beginning of the fiscal year;
2. reviewing quarterly financial statements, which include a balance sheet and statement of revenue, expenditures and changes in fund balance, at each public board meeting;
3. annually adopting and maintaining operating budget for the school
4. retaining the services of a certified public accountant/auditor to conduct the annual independent financial audit;
5. reviewing and approving the audit report, including audit findings and recommendations; and
6. reporting to all applicable legal agencies including the charter school's sponsor
7. overseeing the school's principal and all financial matters delegated to the principal

The School will provide the Sponsor with annual audited financial reports as of June 30 of each year. These reports will include a complete set of financial statements and notes thereto prepared in accordance with generally accepted accounting principles for inclusion into the Board's financial statements annually, formatted by revenue source and expenditures and detailed by function and object, as per the Sponsor's timelines.

The School will utilize the standard state codification of accounts as contained in the Financial and Program Cost Accounting and Reporting for Florida Schools, as a means of codifying all transactions pertaining to its operations for both internal and external reporting. Financial reporting will be subject to any directives issued by the State of Florida and the local school district.

***C. Describe the method by which accounting records will be maintained.***

The School will utilize the standard state codification of accounts as contained in the Financial and Program Cost Accounting and Reporting for Florida Schools, as a means of codifying all transactions pertaining to its operations for both internal and external reporting. Financial reporting will be subject to any directives issued by the State of Florida and Sponsor.

Additionally, these policies, identified in the Board's Policies and Procedures Manual, ensure effective internal controls over revenues, expenses and fixed assets and are evaluated on a monthly basis to ensure compliance with all statutory and regulatory authorities.

Among others, these procedures require the school to:

- ❖ Utilize the standard state codification of accounts (Redbook) as a means of codifying all transactions pertaining to its operations for both internal and external reporting; the Board reserves the right to use GAAP in accordance with the Florida Statute.
- ❖ Open an operating bank account and a school fundraising account with an FDIC insured institution
- ❖ Record transactions managed by these accounts in a QuickBooks or similar program
- ❖ Reconcile monthly reports and bank statements and keep in monthly binders at the school
- ❖ Record and log all cash and checks received and deposit daily.
- ❖ Require dual signatures for all checks over \$2500.00, as established by the Board
- ❖ Prepare disbursement voucher packages at school-site as authorized by the Principal and submit to ESP with appropriate supporting documentation
- ❖ Make disbursements only to authorized/approved vendors
- ❖ Conduct physical property inventories at the beginning and end of every school year to safeguard fixed assets.
- ❖ Categorize, label, and record all fixed assets in an Inventory Log which is updated throughout the school year as items are purchased and disposed
- ❖ Follow the procedures for proper disposal and inventory as detailed in the Internal Accounting Manual
- ❖ Retain documents for a specified amount of time

***D. Describe how the school will store student and financial records.***

The School will maintain both student and financial records in accordance with Chapter 119, Florida Statutes. Retention schedules established by the records and information management program of the Division of Library and Information Services of the Department of State will be followed.

The school maintains both active and archival records for current and former students in accordance with federal, state, local laws and with the regulations prescribed by the Florida Department of Education. The school ensures that all student records are kept confidential as required by applicable law.

All permanent records of students leaving the school, whether by graduation or transfer to another sponsoring district school are transferred to the sponsoring district school in which the student is



enrolled. All students leaving the school to attend an out-of county school or a private educational institution shall have a copy of their permanent record forwarded to the school in which the student is enrolled. All permanent records remain in the last school in which the student was enrolled.

All student and financial records are kept in locked, fireproof cabinets or in a fireproofed locked records storage vault. Only certain school personnel have access to student records, and computerized student records are backed up regularly and stored in a secure area.

Financial Data Security - financial data will be maintained on a secured system/network. Only the School Director and authorized representatives of the Board of Directors have access to the data. Appropriate file backups and physical records will be maintained in a secure environment.

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

The School will maintain insurance coverage limits that either meet or exceed the District minimum insurance limit requirements. The School's insurance shall cover the School (and its subcontractors, to the extent that it is not otherwise insured) for those sources of liability which would be covered by the latest edition of the standard Workers' Compensation Policy, as filed for use in Florida by the National Council on Compensation Insurance, without restrictive endorsements as stated in the Florida Workers' Compensation Act.

Minimum Limits: There shall be no maximum limit on the amount of coverage for liability imposed by the Florida Workers' Compensation Act or any other coverage customarily insured under Part 1 of the standard Worker's Compensation Policy.

The minimum amount of coverage for those customarily insured under Part 2 of the standard Worker's Compensation Policy shall be:

EL Each Accident: \$500,000; EL Each Disease-Policy Limit: \$500,000; EL Disease-Each Employee: \$500,000

Insurance limits and deductibles are as follows:

- General Liability Limit - \$1,000,000/\$3,000,000 Deductible: \$0
- Auto or Hired Non-Owned Auto Liability Limit - \$1,000,000 Deductible: \$0
- Educators Legal Liability and Employment Practices - Limit: \$1,000,000 Deductible: \$2,500 Aggregate: \$2,000,000
- Umbrella/Excess Liability Limit: \$10,000,000 Deductible: \$10,000
- Crime Coverage – Limit: \$1,000,000 Deductible: \$25,000
- Comprehensive Property Coverage – Limit: 100% TIV Deductible: Named Windstorm 5% of TIV, \$5,000 All other Perils

The insurance carrier has AM Best financial rating of A XII, with over \$1 billion in retained earnings according to AM Best.

For Worker's Compensation: Aon Risk Services, Inc. of FL is licensed in the State of FL and Illinois National Insurance Company is rated "A (Excellent)" by AM Best Company.

## Section 19: Action Plan

- i. Applying for and securing appropriate legal status
- ii. Identifying and securing facility
- iii. Recruiting and hiring staff
- iv. Staff training
- v. Finalizing curriculum and other instructional materials
- vi. Governing Board training
- vii. Policy Adoption by Board (if necessary)
- viii. Enrollment Lottery, if necessary
- ix. Acquire furniture, fixtures, equipment
- x. Acquire instructional materials and technology
- xi. Student enrollment

The school's projected timetable for start-up is as follows:

|                                               |                                                                                                                                        |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>May 1,2015</b>                             | Early submission of charter school application proposal                                                                                |
| <b>May 1<sup>st</sup>-July 1<sup>st</sup></b> | Sponsor Review and feedback to Applicant                                                                                               |
| <b>August 2015</b>                            | Submission of charter school application proposal                                                                                      |
| <b>August -November</b>                       | Application Review and Board Interviews                                                                                                |
| <b>November – December</b>                    | School Board consideration of Application<br>Facility Search<br>Grant Solicitation                                                     |
| <b>December – February</b>                    | Contract Negotiations with School District<br>Facilities Identification and Negotiations                                               |
| <b>December - January</b>                     | Grant Preparation                                                                                                                      |
| <b>February</b>                               | Recruitment of Principal                                                                                                               |
| <b>March – May</b>                            | Marketing and Student Recruitment<br>Initial Recruitment of Faculty and Staff                                                          |
| <b>May</b>                                    | Principal selection and hiring by the Board                                                                                            |
| <b>May 15<sup>th</sup></b>                    | Student Registration Begins                                                                                                            |
| <b>May30<sup>th</sup></b>                     | Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted.         |
| <b>June1<sup>st</sup></b>                     | Second Registration Period Begins<br>Vendor Contracts Finalized (food service, uniforms, etc.)                                         |
| <b>June 15<sup>th</sup></b>                   | Students who have registered will be officially enrolled. If number of applicants exceeds capacity, lottery will be conducted.         |
| <b>May-June</b>                               | Curriculum Planning and Purchasing of Materials<br>Technology and School Furniture Purchasing<br>Finalize Staff Recruitment and Hiring |
| <b>July</b>                                   | Preparation of Facilities<br>Finalize Faculty and Staff Hiring<br>Policy Adoption by Board as needed (Budget adoption, etc.)           |

|                    |                                                                                                                                                                                                               |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                    | Governing Board Training/Fingerprinting as needed                                                                                                                                                             |
| <b>July-Aug</b>    | Conduct Final Facilities and Safety Inspections<br>Staff Training (Summer Institutes)<br>Finalize Registrations and Master Schedule<br>Teacher fingerprinting, drug-testing, and background checks completed. |
| <b>August 2016</b> | Textbook and Furniture distribution and inventory<br>Final Curriculum Review with lead staff<br>Faculty Orientation Workshops – PD<br>Student/Parent Orientations<br>Classes Commence as per Sponsor Calendar |

**School-Emergency Management and Recovery Plan** - The School will implement a Security Action Plan articulated in its Employee Handbook that prepares all staff for unanticipated events including but not limited to: medical, fire, hazardous, weather security, etc. The School will cooperate with the District to provide the safest school possible for the staff and students, and will incorporate all the applicable and appropriate District-approved emergency efforts in order to maintain a safe school environment. Accordingly, the School will adopt the emergency plans for fire, hurricane, tornado, and child safety currently in effect within the District.

All staff members will be trained regarding procedures for disaster preparedness plans outlining procedures for emergency situations and natural disasters. Staff will be trained to implement an action plan within an emergency situation. Both students and staff will be trained in planning for these events through routine drills and practice. Procedures and plans will be provided to teachers and the staff through the employee handbook, and parents and community members will receive information regarding emergency procedures via newsletters and parent meetings.

The Governing Board and the School will ensure that all provisions of the Jessica Lunsford Act (1012.465.F.S.) are adhered to at the school in ensuring the safety of all faculty, staff and students on the property.

## \*Addendum – Governance/Management Information

1. Does anyone, who is part of the founding group, governing board, management company or a paid consultant for this application have prior experience in the operation of a charter school? Yes

### What is his/her name?

**Somerset Academy, Inc. Board Members all have prior experience operating a charter school as noted in Section 10 and further detailed in Addendum B. This includes:**

Raul L. Martinez, Jr.- Director / Parent Representative

Louis J. Marin – Director

George B. Ozuna – Director

Tony Morales- Director/Student Alumnus- Somerset Academy

Jenny Esquijarosa– Director/Parent Rep., also Pinecrest Academy Board Member 2011-2014

Ana Diaz, M.S. Elementary Ed. – Director/Secretary, also School Principal at Pinecrest Academy Charter School (Miami-Dade County)

Todd German – Director/Treasurer, also Board Chair for Key West Collegiate School (Monroe County)

Lourdes Isla – Director/Vice-Chair, also School Principal Mater Gardens Academy Charter School (Miami-Dade County)

David Concepcion – Director/Chair, also former Mater Academy, Inc. Board Member 2007-2008 (for information on Mater Academy Schools, please refer to Addendum “C”)

**Somerset Academy, Inc.’s Educational Service Provider, Academica, Corp. and staff have prior experience operating a charter school as noted in Section 11 and further detailed in “Addendum C”. Academica’s President is Fernando Zulueta.**

**What is/was the name of the charter school?** Please refer to “Addendum B” and “Addendum C”  
**In what district is/was the charter school?** Please refer to “Addendum B” and “Addendum C”

2. Has any individual involved in the application for a charter school in Broward County been involved in a charter school that has closed? Yes If you answered YES to number 2, what were the circumstances of the closure? Provide specific details such as voluntary, academic performance, financial viability.

| <i>What is his/her name? In what capacity was the individual involved?</i> | <i>What was the name of the charter school?</i> | <i>In what district was the charter school?</i> | <i>Reason*</i> |
|----------------------------------------------------------------------------|-------------------------------------------------|-------------------------------------------------|----------------|
| Academica, ESP                                                             | Ben Gamla Charter School                        | Pinellas                                        | Voluntary      |
| Academica, ESP                                                             | Palm Bay Community Charter                      | Brevard                                         | Fiscal         |
| Academica, ESP                                                             | Palm Bay Municipal Charter High                 | Brevard                                         | Fiscal         |
| Academica, ESP                                                             | Pinecrest Preparatory Charter High              | Orange                                          | Voluntary      |

\*Please refer to supporting documents in “Addendum C” for thorough explanation regarding the closures.

3. **Are any of the individuals involved in this application associated with a current charter school operating in the state?** Yes

What is his/her name? Somerset Academy, Inc. and Academica

What is the name(s) of the charter school(s)? Please refer to "Addendum B" and "Addendum C" for a list of schools

In what district is the charter school? Please refer to "Addendum B" and "Addendum C"

4. **Are any of the individuals associated with this application part of a founding group, governing board, management company or a paid consultant for a charter school in academic or financial corrective action?** Yes

*(Academic corrective action would be defined as having received a D or F on a State assessment or the point equivalent, or in the case of an SIR school, a rating of declining. Financial corrective action would be defined as meeting any of the criteria noted on Section 218, Florida Statutes).*

What is his/her name? Somerset Academy, Inc. and Academica

What is the name(s) of the school(s)? Please refer to chart below

In what district is the charter school? Please refer to chart below

| <b><i>School</i></b>                                                  | <b><i>District</i></b> | <b><i>Reason</i></b> |
|-----------------------------------------------------------------------|------------------------|----------------------|
| Somerset Academy Hollywood Charter School #5387 (f/k/a Pompano North) | Broward County         | Academic             |
| Somerset Academy Pompano K-5 #5388                                    | Broward County         | Academic             |
| Somerset Academy Village Charter Middle #5002                         | Broward County         | Academic             |
| Somerset Preparatory Academy Charter High at North Lauderdale #5006   | Broward County         | Academic             |
| Somerset Preparatory Academy Charter School at North Lauderdale #5003 | Broward County         | Academic             |
| Somerset Eagle High School #1381                                      | Duval County           | Academic             |
| Somerset Preparatory Academy #5501                                    | Duval County           |                      |
| Pinecrest Creek Charter School                                        | Orange County          | Academic             |

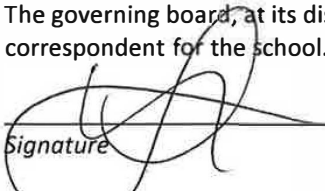
#### IV. STATEMENT OF ASSURANCES

This form must be signed by a duly authorized representative of the applicant group and submitted with the application for a charter school.

As the authorized representative of the applicant group, I hereby certify that the information submitted in this application for a charter for Somerset Parks Academy Charter School is accurate and true to the best of my knowledge and belief; and further, I certify that, if awarded a charter, the school:

- Will be nonsectarian in its programs, admission policies, employment practices and operations.
- Will enroll any eligible student who submits a timely application, unless the school receives a greater number of applications than there are spaces for students, in which case students will be admitted through a random selection process.
- Will adhere to the antidiscrimination provisions of section 1000.05, F.S.
- Will adhere to all applicable provision of state and federal law relating to the education of students with disabilities, including the Individuals with Disabilities Education Act; section 504 of the Rehabilitation Act of 1974; and Title II of the Americans with Disabilities Act of 1990.
- Will adhere to all applicable provisions of federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974.
- Will participate in the statewide assessment program created under section 1008.22, F.S.
- Will comply with Florida statutes relating to public records and public meetings, including Chapter 119, Florida Statutes, and section 286.011, F.S., which are applicable to applicants even prior to being granted a charter.
- Will obtain and keep current all necessary permits, licenses and certifications related to fire, health and safety within the building and on school property.
- Will provide for an annual financial audit in accordance with section 218.39, F.S.

The governing board, at its discretion, allows David Concepcion, Board Chair to sign as the legal correspondent for the school.

  
Signature

July 28, 2015  
Date

David Concepcion  
Printed Name



*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

# ***ADDENDUM B APPLICANT HISTORY WORKSHEET***

**For:  
SOMERSET PARKS  
ACADEMY  
CHARTER SCHOOL**



**Addendum B - Applicant History Worksheet**  
**Schools Currently or Previously Operated by Governing Board**

**Form IEPC-M1A**  
**Rule 6A-6.0786**  
**August 2015**

| Somerset Academy, Inc.         |                                                                 |         | Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure, with supporting documentation if applicable. | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at <a href="http://schoolgrades.fldoe.org/">http://schoolgrades.fldoe.org/</a> . | Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000). | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue) | Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating |
|--------------------------------|-----------------------------------------------------------------|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>2015 (Most Recent Year)</b> |                                                                 |         |                                                                                                                                                                                         |                                                                                                                                |                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                   |                                                                                                                           |                                                                                                                                                                                  |
| District                       | School Name                                                     | MSID    | Status (Active/Closed)                                                                                                                                                                  | Enrollment /FRL%                                                                                                               | School Grade/School Improvement Rating                                                                                                                                                                                                                                     | Year End Fund Balance                                                                                                                                                                             | Unassigned Fund Balance as Percentage of Total Revenue                                                                    | Audit Finding (Yes/No)                                                                                                                                                           |
| Dade                           | Somerset Academy (Miami-Dade)                                   | 13-0520 | Active                                                                                                                                                                                  | 590/65%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Middle School (Miami-Dade)                     | 13-6004 | Active                                                                                                                                                                                  | 211/66%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy (Silver Palms)                                 | 13-0332 | Active                                                                                                                                                                                  | 623/84%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy High School (Miami-Dade)                       | 13-7042 | Active                                                                                                                                                                                  | 347/76%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy High School (South Campus)                     | 13-7038 | Active                                                                                                                                                                                  | 30/83%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Preparatory Academy at Silver Palms                    | 13-4012 | Active                                                                                                                                                                                  | 669/80%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset City Arts Academy                                      | 13-2012 | Active                                                                                                                                                                                  | 363/69%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Middle School (Country Palms)                  | 13-6043 | Active                                                                                                                                                                                  | 35/74%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Oaks Academy                                           | 13-3033 | Active                                                                                                                                                                                  | 293/82%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Elementary School (South Miami Campus)         | 13-2007 | Active                                                                                                                                                                                  | 451/16%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Middle School (South Miami)                    | 13-6053 | Active                                                                                                                                                                                  | 152/17%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Charter Elementary School (South Homestead)    | 13-0339 | Active                                                                                                                                                                                  | 488/85%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Charter Middle School (South Homestead)        | 13-6013 | Active                                                                                                                                                                                  | 222/77%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Charter High School (South Homestead)          | 13-7034 | Active                                                                                                                                                                                  | 110/87%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Gables Academy                                         | 13-5008 | Active                                                                                                                                                                                  | 412/15%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Bay                                            | 13-5062 | Active                                                                                                                                                                                  | 249/16%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Bay Middle School                              | 13-6128 | Active                                                                                                                                                                                  | 42/24%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Virtual Middle High School                     | 13-6016 | Active                                                                                                                                                                                  | 20/25%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Dade                           | Somerset Academy Middle School (Country Palms)                  | 06-5151 | Active                                                                                                                                                                                  | 827/34%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy                                                | 06-5141 | Active                                                                                                                                                                                  | 938/32%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy High School                                    | 06-5221 | Active                                                                                                                                                                                  | 1,101/45%                                                                                                                      | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Arts Conservatory                                      | 06-5396 | Active                                                                                                                                                                                  | 116/36%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy (Miramar Campus)                               | 06-5405 | Active                                                                                                                                                                                  | 644/64%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy Middle School (Miramar Campus)                 | 06-5406 | Active                                                                                                                                                                                  | 439/65%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy Miramar South                                  | 06-5054 | Active                                                                                                                                                                                  | 105/43%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy (Davie)                                        | 06-5211 | Active                                                                                                                                                                                  | 150/59%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy East Preparatory                               | 06-5391 | Active                                                                                                                                                                                  | 289/87%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy Hollywood                                      | 06-5387 | Active                                                                                                                                                                                  | 49/78%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy Hollywood Middle School                        | 06-5419 | Active                                                                                                                                                                                  | 11/82%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy Village                                        | 06-5004 | Active                                                                                                                                                                                  | 235/93%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Academy Village Charter Middle School                  | 06-5002 | Active                                                                                                                                                                                  | 116/90%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |
| Broward                        | Somerset Preparatory Academy Charter School at North Lauderdale | 06-5003 | Active                                                                                                                                                                                  | 701/92%                                                                                                                        | N/A                                                                                                                                                                                                                                                                        | N/A                                                                                                                                                                                               | N/A                                                                                                                       | N/A                                                                                                                                                                              |

**Addendum B - Applicant History Worksheet**  
**Schools Currently or Previously Operated by Governing Board**

**Form IEPC-M1A**  
**Rule 6A-6.0786**  
**August 2015**

| Somerset Academy, Inc. |                                                                 |         | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at <a href="http://schoolgrades.fido.e.org/">http://schoolgrades.fido.e.org/</a> . | Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000). | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue) | Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with |
|------------------------|-----------------------------------------------------------------|---------|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>2014</b>            |                                                                 |         |                                                                                                                                |                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                   |                                                                                                                           |                                                                                                                                                                                                                                                                                                                                        |
| District               | School Name                                                     | MSID    | Enrollment /FRL%                                                                                                               | School Grade/School Improvement Rating                                                                                                                                                                                                                                       | Year End Fund Balance                                                                                                                                                                             | Unassigned Fund Balance as Percentage of Total Revenue                                                                    | Audit Finding (Yes/No)                                                                                                                                                                                                                                                                                                                 |
| Dade                   | Somerset Academy (Miami-Dade)                                   | 13-0520 | 571/59%                                                                                                                        | B                                                                                                                                                                                                                                                                            | \$495,667                                                                                                                                                                                         | 11%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Middle School (Miami-Dade)                     | 13-6004 | 230/67%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$487,286                                                                                                                                                                                         | 32%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy (Silver Palms)                                 | 13-0332 | 631/81%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$100,385                                                                                                                                                                                         | 2%                                                                                                                        | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy High School (Miami-Dade)                       | 13-7042 | 345/78%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$287,250                                                                                                                                                                                         | 11%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy High School (South Campus)                     | 13-7038 | 30/73%                                                                                                                         | A                                                                                                                                                                                                                                                                            | \$102,599                                                                                                                                                                                         | 51%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Preparatory Academy at Silver Palms                    | 13-4012 | 640/82%                                                                                                                        | B                                                                                                                                                                                                                                                                            | \$100,385                                                                                                                                                                                         | 2%                                                                                                                        | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset City Arts Academy                                      | 13-2012 | 315/62%                                                                                                                        | C                                                                                                                                                                                                                                                                            | \$174,426                                                                                                                                                                                         | 6%                                                                                                                        | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Middle School (Country Palms)                  | 13-6043 | 28/64%                                                                                                                         | A                                                                                                                                                                                                                                                                            | \$105,126                                                                                                                                                                                         | 55%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Oaks Academy                                           | 13-3033 | 69/57%                                                                                                                         | N/A                                                                                                                                                                                                                                                                          | \$114,845                                                                                                                                                                                         | 23%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Elementary School (South Miami Campus)         | 13-2007 | 475/16%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$897,039                                                                                                                                                                                         | 21%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Middle School (South Miami)                    | 13-6053 | 115/8%                                                                                                                         | A                                                                                                                                                                                                                                                                            | \$216,837                                                                                                                                                                                         | 29%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Charter Elementary School (South Homestead)    | 13-0339 | 445/76%                                                                                                                        | B                                                                                                                                                                                                                                                                            | \$1,041,118                                                                                                                                                                                       | 29%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Charter Middle School (South Homestead)        | 13-6013 | 184/78%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$268,177                                                                                                                                                                                         | 22%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Charter High School (South Homestead)          | 13-7034 | 79/75%                                                                                                                         | C                                                                                                                                                                                                                                                                            | \$64,060                                                                                                                                                                                          | 12%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Gables Academy                                         | 13-5008 | 294/10%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$414,716                                                                                                                                                                                         | 13%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Bay                                            | 13-5062 | 218/12%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$184,773                                                                                                                                                                                         | 7%                                                                                                                        | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Bay Middle School                              | 13-6128 | 25/16%                                                                                                                         | A                                                                                                                                                                                                                                                                            | \$13,708                                                                                                                                                                                          | 7%                                                                                                                        | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Virtual Middle High School                     | 13-6016 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                                                                     |
| Dade                   | Somerset Academy Middle School (Country Palms)                  | 06-5151 | 870/33%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$406,144                                                                                                                                                                                         | 7%                                                                                                                        | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy                                                | 06-5141 | 938/31%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$1,453,590                                                                                                                                                                                       | 12%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy High School                                    | 06-5221 | 1,030/40%                                                                                                                      | A                                                                                                                                                                                                                                                                            | \$886,551                                                                                                                                                                                         | 12%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Arts Conservatory                                      | 06-5396 | 129/39%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$919,127                                                                                                                                                                                         | 106%                                                                                                                      | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy (Miramar Campus)                               | 06-5405 | 670/57%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$2,740,540                                                                                                                                                                                       | 48%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy Middle School (Miramar Campus)                 | 06-5406 | 449/65%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$853,029                                                                                                                                                                                         | 27%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy Miramar South                                  | 06-5054 | 78/41%                                                                                                                         | N/A                                                                                                                                                                                                                                                                          | \$421,597                                                                                                                                                                                         | 70%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy (Davie)                                        | 06-5211 | 144/45%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$921,834                                                                                                                                                                                         | 77%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy East Preparatory                               | 06-5391 | 289/78%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$1,148,905                                                                                                                                                                                       | 48%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy Hollywood                                      | 06-5387 | 80/81%                                                                                                                         | F                                                                                                                                                                                                                                                                            | \$55,240                                                                                                                                                                                          | 7%                                                                                                                        | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy Hollywood Middle School                        | 06-5419 | 15/80%                                                                                                                         | A                                                                                                                                                                                                                                                                            | \$4,733                                                                                                                                                                                           | 5%                                                                                                                        | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy Village                                        | 06-5004 | 284/94%                                                                                                                        | C                                                                                                                                                                                                                                                                            | \$794,251                                                                                                                                                                                         | 33%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Academy Village Charter Middle School                  | 06-5002 | 128/91%                                                                                                                        | C                                                                                                                                                                                                                                                                            | \$242,720                                                                                                                                                                                         | 22%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |
| Broward                | Somerset Preparatory Academy Charter School at North Lauderdale | 06-5003 | 786/97%                                                                                                                        | D                                                                                                                                                                                                                                                                            | \$1,000,581                                                                                                                                                                                       | 16%                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                     |

**Addendum B - Applicant History Worksheet**  
**Schools Currently or Previously Operated by Governing Board**

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**Rule 6A-6.0786**  
**August 2015**

| Somerset Academy, Inc. |                                                                 |         | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at <a href="http://schoolgrades.fldoe.org/">http://schoolgrades.fldoe.org/</a> . | Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000). | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue) | Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If |
|------------------------|-----------------------------------------------------------------|---------|--------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>2013</b>            |                                                                 |         |                                                                                                                                |                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                   |                                                                                                                           |                                                                                                                                                                                                                                                                                              |
| District               | School Name                                                     | MSID    | Enrollment /FRL%                                                                                                               | School Grade/School Improvement Rating                                                                                                                                                                                                                                     | Year End Fund Balance                                                                                                                                                                             | Unassigned Fund Balance as Percentage of Total Revenue                                                                    | Audit Finding (Yes/No)                                                                                                                                                                                                                                                                       |
| Dade                   | Somerset Academy (Miami-Dade)                                   | 13-0520 | 175/49%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$148,938                                                                                                                                                                                         | 4%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Middle School (Miami-Dade)                     | 13-6004 | 222/50%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$359,633                                                                                                                                                                                         | 26%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy (Silver Palms)                                 | 13-0332 | 637/84%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$187,858                                                                                                                                                                                         | 4%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy High School (Miami-Dade)                       | 13-7042 | 343/80%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$403,913                                                                                                                                                                                         | 17%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy High School (South Campus)                     | 13-7038 | 4/100%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | \$71,115                                                                                                                                                                                          | 261%                                                                                                                      | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Preparatory Academy at Silver Palms                    | 13-4012 | 612/85%                                                                                                                        | B                                                                                                                                                                                                                                                                          | \$187,858                                                                                                                                                                                         | 4%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset City Arts Academy                                      | 13-2012 | 296/30%                                                                                                                        | C                                                                                                                                                                                                                                                                          | \$132,946                                                                                                                                                                                         | 5%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Middle School (Country Palms)                  | 13-6043 | 38/24%                                                                                                                         | C                                                                                                                                                                                                                                                                          | \$68,963                                                                                                                                                                                          | 30%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Oaks Academy                                           | 13-3033 | 54/24%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | \$46,073                                                                                                                                                                                          | 8%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Elementary School (South Miami Campus)         | 13-2007 | 476/15%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$598,933                                                                                                                                                                                         | 15%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Middle School (South Miami)                    | 13-6053 | 131/18%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$147,518                                                                                                                                                                                         | 19%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Charter Elementary School (South Homestead)    | 13-0339 | 315/73%                                                                                                                        | B                                                                                                                                                                                                                                                                          | \$551,280                                                                                                                                                                                         | 22%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Charter Middle School (South Homestead)        | 13-6013 | 134/75%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$200,615                                                                                                                                                                                         | 25%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Charter High School (South Homestead)          | 13-7034 | 41/78%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | \$15,896                                                                                                                                                                                          | 3%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Gables Academy                                         | 13-5008 | 231/4%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | \$321,017                                                                                                                                                                                         | 14%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Bay                                            | 13-5062 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Bay Middle School                              | 13-6128 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Virtual Middle High School                     | 13-6016 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Middle School (Country Palms)                  | 06-5151 | 868/32                                                                                                                         | A                                                                                                                                                                                                                                                                          | \$419,022                                                                                                                                                                                         | 8%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy                                                | 06-5141 | 895/36%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$227,621                                                                                                                                                                                         | 2%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy High School                                    | 06-5221 | 853/36                                                                                                                         | A                                                                                                                                                                                                                                                                          | \$702,884                                                                                                                                                                                         | 12%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Arts Conservatory                                      | 06-5396 | 163/37%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$695,169                                                                                                                                                                                         | 69%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy (Miramar Campus)                               | 06-5405 | 722/63%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$2,490,987                                                                                                                                                                                       | 13%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Middle School (Miramar Campus)                 | 06-5406 | 391/68%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$512,017                                                                                                                                                                                         | 20%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Miramar South                                  | 06-5054 | 79/57%                                                                                                                         | N/A                                                                                                                                                                                                                                                                        | \$208,570                                                                                                                                                                                         | 37%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy (Davie)                                        | 06-5211 | 149/36%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$778,162                                                                                                                                                                                         | 72%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy East Preparatory                               | 06-5391 | 297/80%                                                                                                                        | A                                                                                                                                                                                                                                                                          | \$942,097                                                                                                                                                                                         | 42%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Hollywood                                      | 06-5387 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Hollywood Middle School                        | 06-5419 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Village                                        | 06-5004 | 302/89%                                                                                                                        | C                                                                                                                                                                                                                                                                          | \$715,931                                                                                                                                                                                         | 32%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Village Charter Middle School                  | 06-5002 | 161/87%                                                                                                                        | D                                                                                                                                                                                                                                                                          | \$91,322                                                                                                                                                                                          | 7%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Preparatory Academy Charter School at North Lauderdale | 06-5003 | 788/91%                                                                                                                        | C                                                                                                                                                                                                                                                                          | \$463,756                                                                                                                                                                                         | 8%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |

**Addendum B - Applicant History Worksheet**  
**Schools Currently or Previously Operated by Governing Board**

**Form IEPC-M1A**  
**Rule 6A-6.0786**  
**August 2015**

| Somerset Academy, Inc. |                                                                 |         | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at <a href="http://schoolgrades.fido.org/">http://schoolgrades.fido.org/</a> . | Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000). | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue) | Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," |
|------------------------|-----------------------------------------------------------------|---------|--------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>2012</b>            |                                                                 |         |                                                                                                                                |                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           |                                                                                                                                                                                                                                               |
| District               | School Name                                                     | MSID    | Enrollment /FRL%                                                                                                               | School Grade/School Improvement Rating                                                                                                                                                                                                                                   | Year End Fund Balance                                                                                                                                                                             | Unassigned Fund Balance as Percentage of Total Revenue                                                                    | Audit Finding (Yes/No)                                                                                                                                                                                                                        |
| Dade                   | Somerset Academy (Miami-Dade)                                   | 13-0520 | 546/57%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$159,511                                                                                                                                                                                         | 4%                                                                                                                        | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Middle School (Miami-Dade)                     | 13-6004 | 227/54%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$304,650                                                                                                                                                                                         | 22%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy (Silver Palms)                                 | 13-0332 | 623/82%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$282,124                                                                                                                                                                                         | 6%                                                                                                                        | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy High School (Miami-Dade)                       | 13-7042 | 366/82%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$494,331                                                                                                                                                                                         | 20%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy High School (South Campus)                     | 13-7038 | 5/100%                                                                                                                         | N/A                                                                                                                                                                                                                                                                      | \$85,648                                                                                                                                                                                          | 221%                                                                                                                      | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Preparatory Academy at Silver Palms                    | 13-4012 | 479/82%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$282,124                                                                                                                                                                                         | 6%                                                                                                                        | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset City Arts Academy                                      | 13-2012 | 243/52%                                                                                                                        | B                                                                                                                                                                                                                                                                        | \$118,820                                                                                                                                                                                         | 6%                                                                                                                        | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Middle School (Country Palms)                  | 13-6043 | 18/61%                                                                                                                         | N/A                                                                                                                                                                                                                                                                      | \$70,062                                                                                                                                                                                          | 39%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Oaks Academy                                           | 13-3033 | 18/39%                                                                                                                         | N/A                                                                                                                                                                                                                                                                      | \$30,194                                                                                                                                                                                          | 21%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Elementary School (South Miami Campus)         | 13-2007 | 456/14%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$504,433                                                                                                                                                                                         | 13%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Middle School (South Miami)                    | 13-6053 | 116/15%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$81,818                                                                                                                                                                                          | 12%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Charter Elementary School (South Homestead)    | 13-0339 | 316/73%                                                                                                                        | B                                                                                                                                                                                                                                                                        | \$440,096                                                                                                                                                                                         | 19%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Charter Middle School (South Homestead)        | 13-6013 | 114/72%                                                                                                                        | B                                                                                                                                                                                                                                                                        | \$185,352                                                                                                                                                                                         | 27%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Charter High School (South Homestead)          | 13-7034 | 20/70%                                                                                                                         | N/A                                                                                                                                                                                                                                                                      | \$1,516                                                                                                                                                                                           | 1%                                                                                                                        | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Gables Academy                                         | 13-5008 | 75/1%                                                                                                                          | N/A                                                                                                                                                                                                                                                                      | \$290,359                                                                                                                                                                                         | 26%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Bay                                            | 13-5062 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Bay Middle School                              | 13-6128 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Virtual Middle High School                     | 13-6016 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                            |
| Dade                   | Somerset Academy Middle School (Country Palms)                  | 06-5151 | 842/38%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$70,062                                                                                                                                                                                          | 39%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy                                                | 06-5141 | 886/35%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$80,856                                                                                                                                                                                          | 1%                                                                                                                        | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy High School                                    | 06-5221 | 755/43%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$37,014                                                                                                                                                                                          | 1%                                                                                                                        | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Arts Conservatory                                      | 06-5396 | 91/47%                                                                                                                         | A                                                                                                                                                                                                                                                                        | \$421,087                                                                                                                                                                                         | 75%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy (Miramar Campus)                               | 06-5405 | 811/62%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$2,260,864                                                                                                                                                                                       | 37%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy Middle School (Miramar Campus)                 | 06-5406 | 357/67%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$388,429                                                                                                                                                                                         | 17%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy Miramar South                                  | 06-5054 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                      | \$2,260,864                                                                                                                                                                                       | 37%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy (Davie)                                        | 06-5211 | 141/40%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$695,352                                                                                                                                                                                         | 67%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy East Preparatory                               | 06-5391 | 299/82%                                                                                                                        | A                                                                                                                                                                                                                                                                        | \$689,025                                                                                                                                                                                         | 31%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy Hollywood                                      | 06-5387 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy Hollywood Middle School                        | 06-5419 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy Village                                        | 06-5004 | 348/83%                                                                                                                        | C                                                                                                                                                                                                                                                                        | \$619,330                                                                                                                                                                                         | 25%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Academy Village Charter Middle School                  | 06-5002 | 141/84%                                                                                                                        | C                                                                                                                                                                                                                                                                        | \$111,142                                                                                                                                                                                         | 10%                                                                                                                       | No                                                                                                                                                                                                                                            |
| Broward                | Somerset Preparatory Academy Charter School at North Lauderdale | 06-5003 | 687/85%                                                                                                                        | C                                                                                                                                                                                                                                                                        | \$195,071                                                                                                                                                                                         | 4%                                                                                                                        | No                                                                                                                                                                                                                                            |

**Addendum B - Applicant History Worksheet**  
**Schools Currently or Previously Operated by Governing Board**

**Form IEPC-M1A**  
**Rule 6A-6.0786**  
**August 2015**

| Somerset Academy, Inc. |                                                                 |         | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at <a href="http://schoolgrades.fido.e.org/">http://schoolgrades.fido.e.org/</a> . | Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000). | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue) | Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If |
|------------------------|-----------------------------------------------------------------|---------|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>2011</b>            |                                                                 |         |                                                                                                                                |                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                   |                                                                                                                           |                                                                                                                                                                                                                                                                                              |
| District               | School Name                                                     | MSID    | Enrollment /FRL%                                                                                                               | School Grade/School Improvement Rating                                                                                                                                                                                                                                       | Year End Fund Balance                                                                                                                                                                             | Unassigned Fund Balance as Percentage of Total Revenue                                                                    | Audit Finding (Yes/No)                                                                                                                                                                                                                                                                       |
| Dade                   | Somerset Academy (Miami-Dade)                                   | 13-0520 | 527/54%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$153,993                                                                                                                                                                                         | 4%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Middle School (Miami-Dade)                     | 13-6004 | 174/46%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$291,211                                                                                                                                                                                         | 24%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy (Silver Palms)                                 | 13-0332 | 948/80%                                                                                                                        | N/A                                                                                                                                                                                                                                                                          | \$496,376                                                                                                                                                                                         | 7%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy High School (Miami-Dade)                       | 13-7042 | 286/81%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$692,019                                                                                                                                                                                         | 31%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy High School (South Campus)                     | 13-7038 | 17/82%                                                                                                                         | N/A                                                                                                                                                                                                                                                                          | \$105,205                                                                                                                                                                                         | 56%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Preparatory Academy at Silver Palms                    | 13-4012 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          | \$496,376                                                                                                                                                                                         | 7%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset City Arts Academy                                      | 13-2012 | 209/33%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$28,373                                                                                                                                                                                          | 2%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Middle School (Country Palms)                  | 13-6043 | 10/10%                                                                                                                         | N/A                                                                                                                                                                                                                                                                          | \$29,985                                                                                                                                                                                          | 29%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Oaks Academy                                           | 13-3033 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Elementary School (South Miami Campus)         | 13-2007 | 425/14%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$402,182                                                                                                                                                                                         | 9%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Middle School (South Miami)                    | 13-6053 | 73/8%                                                                                                                          | A                                                                                                                                                                                                                                                                            | \$47,509                                                                                                                                                                                          | 10%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Charter Elementary School (South Homestead)    | 13-0339 | 292/67%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$418,590                                                                                                                                                                                         | 18%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Charter Middle School (South Homestead)        | 13-6013 | 104/65%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$168,647                                                                                                                                                                                         | 23%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Charter High School (South Homestead)          | 13-7034 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Gables Academy                                         | 13-5008 | 57/2%                                                                                                                          | N/A                                                                                                                                                                                                                                                                          | \$23,497                                                                                                                                                                                          | 3%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Bay                                            | 13-5062 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Bay Middle School                              | 13-6128 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Virtual Middle High School                     | 13-6016 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Dade                   | Somerset Academy Middle School (Country Palms)                  | 06-5151 | 795/27%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$29,985                                                                                                                                                                                          | 29%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy                                                | 06-5141 | 862/31%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$1,394,864                                                                                                                                                                                       | 17%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy High School                                    | 06-5221 | 703/36%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$738,552                                                                                                                                                                                         | 14%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Arts Conservatory                                      | 06-5396 | 76/36%                                                                                                                         | A                                                                                                                                                                                                                                                                            | \$331,080                                                                                                                                                                                         | 61%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy (Miramar Campus)                               | 06-5405 | 695/55%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$2,475,131                                                                                                                                                                                       | 40%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Middle School (Miramar Campus)                 | 06-5406 | 396/55%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$595,337                                                                                                                                                                                         | 20%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Miramar South                                  | 06-5054 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy (Davie)                                        | 06-5211 | 142/42%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$627,236                                                                                                                                                                                         | 55%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy East Preparatory                               | 06-5391 | 232/73%                                                                                                                        | A                                                                                                                                                                                                                                                                            | \$391,536                                                                                                                                                                                         | 19%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Hollywood                                      | 06-5387 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Hollywood Middle School                        | 06-5419 | N/A                                                                                                                            | N/A                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                   |                                                                                                                           | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Village                                        | 06-5004 | 306/81%                                                                                                                        | C                                                                                                                                                                                                                                                                            | \$339,736                                                                                                                                                                                         | 12%                                                                                                                       | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Academy Village Charter Middle School                  | 06-5002 | 92/87%                                                                                                                         | C                                                                                                                                                                                                                                                                            | \$8,652                                                                                                                                                                                           | 1%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |
| Broward                | Somerset Preparatory Academy Charter School at North Lauderdale | 06-5003 | 440/81%                                                                                                                        | D                                                                                                                                                                                                                                                                            | \$203,298                                                                                                                                                                                         | 6%                                                                                                                        | No                                                                                                                                                                                                                                                                                           |



*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

# ***ADDENDUM C ESP WORK HISTORY***

**For:  
SOMERSET PARKS  
ACADEMY  
CHARTER SCHOOL**

# **Addendum C - Applicant Worksheet History Schools Previously Operated by Management Company**

**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| ACADEMICA               |                                                         |         | Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued | Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by | Applicant should indicate whether the independent financial audit included any of the following findings: financial |
|-------------------------|---------------------------------------------------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| 2015 (Most Recent Year) |                                                         |         |                                                                                                                                                |                                                                                                         |                                                                                                |                                                                                                    |                                                                                                            |                                                                                                                     |
| District                | School Name                                             | MSID    | Status (Active/Closed)                                                                                                                         | Enrollment /FRL%                                                                                        | School Grade/School Improvement Rating                                                         | Year End Fund Balance                                                                              | Unassigned Fund Balance as Percentage of Total Revenue                                                     | Audit Finding (Yes/No)                                                                                              |
| Dade                    | Mater Academy                                           | 13-0100 | Active                                                                                                                                         | 1,603/ 93%                                                                                              | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy East Charter School                       | 13-3100 | Active                                                                                                                                         | 621/ 86%                                                                                                | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy East Charter Middle School                | 13-6009 | Active                                                                                                                                         | 333/96%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy East Charter High School                  | 13-7037 | Active                                                                                                                                         | 339/96%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy of International Studies                  | 13-1017 | Active                                                                                                                                         | 553/98%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy Middle School of International Studies    | 13-6047 | Active                                                                                                                                         | 188/94%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy High School of International Studies      | 13-7024 | Active                                                                                                                                         | 20/100%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy Middle School                             | 13-6012 | Active                                                                                                                                         | 1,351/87%                                                                                               | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy High School                               | 13-7160 | Active                                                                                                                                         | 1,742/84%                                                                                               | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Performing Arts & Entertainment Academy           | 13-7014 | Active                                                                                                                                         | 333/81%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Gardens Academy Elementary School                 | 13-0312 | Active                                                                                                                                         | 582/53%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Gardens Academy Middle School                     | 13-6042 | Active                                                                                                                                         | 218/60%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Lakes Academy Middle School                       | 13-6033 | Active                                                                                                                                         | 845/78%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Lakes Academy High School                         | 13-7018 | Active                                                                                                                                         | 1,143/76%                                                                                               | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy (Miami Beach)                             | 13-5047 | Active                                                                                                                                         | 532/70%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy High School (Miami Beach)                 | 13-7025 | Active                                                                                                                                         | 30/87%                                                                                                  | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Grove Academy                                     | 13-5045 | Active                                                                                                                                         | 182/58%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Brickell Preparatory School                       | 13-5046 | Active                                                                                                                                         | 172/53%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy at Mt. Sinai                              | 13-5054 | Active                                                                                                                                         | 146/58%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | iMater Academy                                          | 13-5384 | Active                                                                                                                                         | 565/95%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | iMater Academy Middle School                            | 13-6014 | Active                                                                                                                                         | 768/90%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | iMater Preparatory Academy High School                  | 13-7090 | Active                                                                                                                                         | 383/87%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Mater Academy Virtual Middle School                     | 13-6997 | Active                                                                                                                                         | 23/48%                                                                                                  | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Sports Leadership and Management Charter Middle School  | 13-6015 | Active                                                                                                                                         | 568/86%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Sports Leadership and Management Charter High School    | 13-7016 | Active                                                                                                                                         | 394/87%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Ben Gamla Charter School                                | 13-5022 | Active                                                                                                                                         | 249/36%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | City of Hialeah Educational Academy                     | 13-7262 | Active                                                                                                                                         | 619/87%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Doral Academy                                           | 13-3030 | Active                                                                                                                                         | 1,143/44%                                                                                               | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Just Arts and Management Middle School                  | 13-6083 | Active                                                                                                                                         | 99/56%                                                                                                  | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Doral Academy of Technology                             | 13-3029 | Active                                                                                                                                         | 185/53%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Doral Academy Charter Middle School                     | 13-6030 | Active                                                                                                                                         | 1,283/58%                                                                                               | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Doral Academy Charter High School                       | 13-7020 | Active                                                                                                                                         | 1,515/60%                                                                                               | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Doral Performing Arts and Entertainment Academy         | 13-7009 | Active                                                                                                                                         | 379/54%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Theodore R. and Thelma A. Gibson Charter School         | 13-2060 | Active                                                                                                                                         | 286/100%                                                                                                | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Integrated Science and Asian Culture Academy            | 13-2004 | Active                                                                                                                                         | 13/77%                                                                                                  | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | International Studies Charter Middle School             | 13-6045 | Active                                                                                                                                         | 300/63%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | International Studies Charter High School               | 13-7007 | Active                                                                                                                                         | 391/61%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | International Studies Virtual Academy                   | 13-6017 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Miami Children's Museum Charter School                  | 13-4000 | Active                                                                                                                                         | 303/15%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Pinecrest Preparatory Academy Charter School            | 13-0600 | Active                                                                                                                                         | 650/55%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Pinecrest Preparatory Academy Charter Middle School     | 13-6022 | Active                                                                                                                                         | 537/64%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Pinecrest Preparatory Academy High School               | 13-7053 | Active                                                                                                                                         | 477/63%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Pinecrest Academy South Campus                          | 13-0342 | Active                                                                                                                                         | 732/63%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Pinecrest Palm Academy                                  | 13-4634 | Active                                                                                                                                         | 18/0%                                                                                                   | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Pinecrest Academy (North Campus)                        | 13-5048 | Active                                                                                                                                         | 437/66%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Pinecrest Academy Middle School (North Campus)          | 13-6003 | Active                                                                                                                                         | 22/73%                                                                                                  | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Pinecrest Cove Academy                                  | 13-5049 | Active                                                                                                                                         | 731/56%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Academy (Miami-Dade)                           | 13-0520 | Active                                                                                                                                         | 590/65%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Academy Middle School (Miami-Dade)             | 13-6004 | Active                                                                                                                                         | 211/66%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Academy (Silver Palms)                         | 13-0332 | Active                                                                                                                                         | 623/84%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Academy High School (Miami-Dade)               | 13-7042 | Active                                                                                                                                         | 347/76%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Academy High School (South Campus)             | 13-7038 | Active                                                                                                                                         | 30/83%                                                                                                  | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Preparatory Academy at Silver Palms            | 13-4012 | Active                                                                                                                                         | 669/80%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset City Arts Academy                              | 13-2012 | Active                                                                                                                                         | 363/69%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Academy Middle School (Country Palms)          | 13-6043 | Active                                                                                                                                         | 35/74%                                                                                                  | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Oaks Academy                                   | 13-3033 | Active                                                                                                                                         | 293/82%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Academy Elementary School (South Miami Campus) | 13-2007 | Active                                                                                                                                         | 451/16%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade                    | Somerset Academy Middle School (South Miami)            | 13-6053 | Active                                                                                                                                         | 152/17%                                                                                                 | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |

# **Addendum C - Applicant Worksheet History Schools Previously Operated by Management Company**

**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| District   | School Name                                                          | MSID    | Status<br>(Active/Closed) | Enrollment /FRL% | School<br>Grade/School<br>Improvement<br>Rating | Year End Fund<br>Balance | Unassigned Fund<br>Balance as<br>Percentage of<br>Total Revenue | Audit Finding<br>(Yes/No) |
|------------|----------------------------------------------------------------------|---------|---------------------------|------------------|-------------------------------------------------|--------------------------|-----------------------------------------------------------------|---------------------------|
| Dade       | Somerset Academy Charter Elementary School (South Homestead)         | 13-0339 | Active                    | 488/85%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Charter Middle School (South Homestead)             | 13-6013 | Active                    | 222/77%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Charter High School (South Homestead)               | 13-7034 | Active                    | 110/87%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Gables Academy                                              | 13-5008 | Active                    | 412/15%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Bay                                                 | 13-5062 | Active                    | 249/16%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Bay Middle School                                   | 13-6128 | Active                    | 42/24%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Virtual Middle High School                          | 13-6016 | Active                    | 20/25%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Middle School (Country Palms)                       | 06-5151 | Active                    | 827/34%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy                                                     | 06-5141 | Active                    | 938/32%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy High School                                         | 06-5221 | Active                    | 1,101/45%        | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Arts Conservatory                                           | 06-5396 | Active                    | 116/36%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy (Miramar Campus)                                    | 06-5405 | Active                    | 644/64%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Middle School (Miramar Campus)                      | 06-5406 | Active                    | 439/65%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Miramar South                                       | 06-5054 | Active                    | 105/43%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy (Davie)                                             | 06-5211 | Active                    | 150/59%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy East Preparatory                                    | 06-5391 | Active                    | 289/87%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Hollywood                                           | 06-5387 | Active                    | 49/78%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Hollywood Middle School                             | 06-5419 | Active                    | 11/82%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Village                                             | 06-5004 | Active                    | 235/93%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Village Charter Middle School                       | 06-5002 | Active                    | 116/90%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Preparatory Academy Charter School at North Lauderdale      | 06-5003 | Active                    | 701/92%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Preparatory Academy Charter High School at North Lauderdale | 06-5006 | Active                    | 215/84%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Neighborhood School                                 | 06-5021 | Active                    | 515/73%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Preparatory Academy Charter Middle School                   | 06-5441 | Active                    | 334/75%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Charter High School (Miramar Campus)                | 06-5007 | Active                    | 282/66%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Pines Academy                                               | 06-5030 | Active                    | 484/71%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Pompano                                             | 06-5388 | Active                    | 165/81%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Pompano Middle School                               | 06-5413 | Active                    | 24/83%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Ben Gamla Charter School                                             | 06-5410 | Active                    | 589/50%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Ben Gamla Charter School (North Campus)                              | 06-5001 | Active                    | 76/71%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Ben Gamla South Broward                                              | 06-5392 | Active                    | 379/60%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Ben Gamla Charter School (Hallandale Campus)                         | 06-5025 | Active                    | 12/58%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Ben Gamla Charter High School                                        | 06-5005 | Active                    | 128/53%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Cornerstone Charter Academy                                          | 48-0133 | Active                    | 916/9%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Cornerstone Charter High School                                      | 48-0146 | Active                    | 355/11%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Pinecrest Preparatory Charter School (Orlando Campus)                | 48-0155 | Active                    | 226/12%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Pinecrest Creek Academy                                              | 48-0203 | Active                    | 208/22%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Duval      | Somerset Academy (Eagle Campus)                                      | 16-1251 | Active                    | 219/12%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Duval      | Somerset Academy Charter Middle School (Eagle Campus)                | 16-1261 | Active                    | 109/16%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Duval      | Somerset Academy High School (Eagle Campus)                          | 16-1381 | Active                    | 28/14%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Duval      | Somerset Preparatory Academy                                         | 16-5501 | Active                    | 356/23%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Ben Gamla Charter School Palm Beach                                  | 50-3941 | Active                    | 286/0%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Boca                                                | 50-3413 | Active                    | 318/0%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Boca Middle                                         | 50-4041 | Active                    | 41/0%            | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Middle School                                       | 50-4012 | Active                    | 748/0%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Canyons High School                                 | 50-4013 | Active                    | 242/0%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| St. Lucie  | Somerset College Preparatory Academy                                 | 56-0712 | Active                    | 291/44%          | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Monroe     | Key West Collegiate School                                           | 44-0382 | Active                    | 77/5%            | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Excelsior Language Academy of Hialeah                                | 13-5029 | Active                    | --               | --                                              | --                       | --                                                              | --                        |
| Dade       | Excelsior Academy High School                                        | 13-7054 | Active                    | --               | --                                              | --                       | --                                                              | --                        |
| Brevard    | Odyssey Charter School                                               | 05-6507 | Active                    | --               | --                                              | --                       | --                                                              | --                        |
| Brevard    | Palm Bay Community Charter                                           | 05-6519 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Brevard    | Palm Bay Municipal Charter High School                               | 05-6520 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Pinecrest Preparatory Charter High School (Orlando Campus)           | 48-0162 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Pinellas   | Ben Gamla Charter School                                             | 52-7321 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Monroe     | Key West Montessori Charter School                                   | 44-0351 | Active                    | --               | --                                              | --                       | --                                                              | --                        |

\*See supporting documentation  
-- School did not have service agreement with ESP



# **Addendum C - Applicant Worksheet History Schools Previously Operated by Management Company**

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| ACADEMICA |                                                         |         | Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued | Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by | Applicant should indicate whether the independent financial audit included any of the following findings: financial |
|-----------|---------------------------------------------------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| District  | School Name                                             | MSID    | Status (Active/Closed)                                                                                                                         | Enrollment /FRL%                                                                                        | School Grade/School Improvement Rating                                                         | Year End Fund Balance                                                                              | Unassigned Fund Balance as Percentage of Total Revenue                                                     | Audit Finding (Yes/No)                                                                                              |
| Dade      | Mater Academy                                           | 13-0100 | Active                                                                                                                                         | 747/91%                                                                                                 | A                                                                                              | \$2,824,936                                                                                        | 48%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter School                       | 13-3100 | Active                                                                                                                                         | 627/87%                                                                                                 | A                                                                                              | \$2,431,290                                                                                        | 48%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter Middle School                | 13-6009 | Active                                                                                                                                         | 355/96%                                                                                                 | C                                                                                              | \$691,613                                                                                          | 28%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter High School                  | 13-7037 | Active                                                                                                                                         | 355/93%                                                                                                 | B                                                                                              | \$300,020                                                                                          | 12%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy of International Studies                  | 13-1017 | Active                                                                                                                                         | 560/97%                                                                                                 | A                                                                                              | \$570,624                                                                                          | 13%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy Middle School of International Studies    | 13-6047 | Active                                                                                                                                         | 150/93%                                                                                                 | A                                                                                              | \$223,174                                                                                          | 19%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy High School of International Studies      | 13-7024 | Active                                                                                                                                         | 25/92%                                                                                                  | B                                                                                              | \$423,645                                                                                          | 224%                                                                                                       | No                                                                                                                  |
| Dade      | Mater Academy Middle School                             | 13-6012 | Active                                                                                                                                         | 1,351/83%                                                                                               | A                                                                                              | \$2,786,060                                                                                        | 29%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy High School                               | 13-7160 | Active                                                                                                                                         | 1,709/81%                                                                                               | A                                                                                              | \$3,092,787                                                                                        | 24%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Performing Arts & Entertainment Academy           | 13-7014 | Active                                                                                                                                         | 238/74%                                                                                                 | A                                                                                              | \$441,918                                                                                          | 26%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Gardens Academy Elementary School                 | 13-0312 | Active                                                                                                                                         | 570/52%                                                                                                 | A                                                                                              | \$129,966                                                                                          | 3%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Gardens Academy Middle School                     | 13-6042 | Active                                                                                                                                         | 231/55%                                                                                                 | A                                                                                              | \$84,830                                                                                           | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Lakes Academy Middle School                       | 13-6033 | Active                                                                                                                                         | 792/77%                                                                                                 | A                                                                                              | \$1,630,634                                                                                        | 31%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Lakes Academy High School                         | 13-7018 | Active                                                                                                                                         | 1,007/73%                                                                                               | A                                                                                              | \$3,218,282                                                                                        | 45%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy (Miami Beach)                             | 13-5047 | Active                                                                                                                                         | 537/69%                                                                                                 | B                                                                                              | \$771,702                                                                                          | 17%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy High School (Miami Beach)                 | 13-7025 | Active                                                                                                                                         | 17/82%                                                                                                  | C                                                                                              | \$36,522                                                                                           | 24%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Grove Academy                                     | 13-5045 | Active                                                                                                                                         | 134/39%                                                                                                 | A                                                                                              | \$238,986                                                                                          | 24%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Brickell Preparatory School                       | 13-5046 | Active                                                                                                                                         | 171/25%                                                                                                 | A                                                                                              | \$214,693                                                                                          | 17%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy at Mt. Sinai                              | 13-5054 | Active                                                                                                                                         | 105/57%                                                                                                 | N/A                                                                                            | \$191,116                                                                                          | 18%                                                                                                        | No                                                                                                                  |
| Dade      | iMater Academy                                          | 13-5384 | Active                                                                                                                                         | 389/95%                                                                                                 | B                                                                                              | \$75,244                                                                                           | 2%                                                                                                         | No                                                                                                                  |
| Dade      | iMater Academy Middle School                            | 13-6014 | Active                                                                                                                                         | 541/86%                                                                                                 | C                                                                                              | \$310,487                                                                                          | 9%                                                                                                         | No                                                                                                                  |
| Dade      | iMater Preparatory Academy High School                  | 13-7090 | Active                                                                                                                                         | 201/82%                                                                                                 | C                                                                                              | \$115,111                                                                                          | 8%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy Virtual Middle School                     | 13-6997 | Active                                                                                                                                         | 16/56%                                                                                                  | N/A                                                                                            | \$6,294                                                                                            | 11%                                                                                                        | No                                                                                                                  |
| Dade      | Sports Leadership and Management Charter Middle School  | 13-6015 | Active                                                                                                                                         | 441/83%                                                                                                 | C                                                                                              | \$58,001                                                                                           | 2%                                                                                                         | No                                                                                                                  |
| Dade      | Sports Leadership and Management Charter High School    | 13-7016 | Active                                                                                                                                         | 265/85%                                                                                                 | C                                                                                              | \$149,664                                                                                          | 8%                                                                                                         | No                                                                                                                  |
| Dade      | Ben Gamla Charter School                                | 13-5022 | Active                                                                                                                                         | 241/34%                                                                                                 | A                                                                                              | \$70,870                                                                                           | 4%                                                                                                         | No                                                                                                                  |
| Dade      | City of Hialeah Educational Academy                     | 13-7262 | Active                                                                                                                                         | 571/89%                                                                                                 | A                                                                                              | \$494,184                                                                                          | 12%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy                                           | 13-3030 | Active                                                                                                                                         | 1,140/39%                                                                                               | A                                                                                              | \$3,807,527                                                                                        | 39%                                                                                                        | No                                                                                                                  |
| Dade      | Just Arts and Management Middle School                  | 13-6083 | Active                                                                                                                                         | 100/41%                                                                                                 | A                                                                                              | \$123,415                                                                                          | 15%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy of Technology                             | 13-3029 | Active                                                                                                                                         | 186/43%                                                                                                 | A                                                                                              | \$677,361                                                                                          | 51%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy Charter Middle School                     | 13-6030 | Active                                                                                                                                         | 1,321/58%                                                                                               | A                                                                                              | \$3,089,055                                                                                        | 32%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy Charter High School                       | 13-7020 | Active                                                                                                                                         | 1,384/60%                                                                                               | B                                                                                              | \$141,204                                                                                          | 1%                                                                                                         | No                                                                                                                  |
| Dade      | Doral Performing Arts and Entertainment Academy         | 13-7009 | Active                                                                                                                                         | 331/51%                                                                                                 | A                                                                                              | \$103,635                                                                                          | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Theodore R. and Thelma A. Gibson Charter School         | 13-2060 | Active                                                                                                                                         | 245/99%                                                                                                 | C                                                                                              | -\$50,032                                                                                          | -2%                                                                                                        | No                                                                                                                  |
| Dade      | Integrated Science and Asian Culture Academy            | 13-2004 | Active                                                                                                                                         | 25/12%                                                                                                  | A                                                                                              | \$97,670                                                                                           | 52%                                                                                                        | No                                                                                                                  |
| Dade      | International Studies Charter Middle School             | 13-6045 | Active                                                                                                                                         | 299/64%                                                                                                 | A                                                                                              | \$280,960                                                                                          | 14%                                                                                                        | No                                                                                                                  |
| Dade      | International Studies Charter High School               | 13-7007 | Active                                                                                                                                         | 405/60%                                                                                                 | A                                                                                              | \$201,304                                                                                          | 17%                                                                                                        | No                                                                                                                  |
| Dade      | International Studies Virtual Academy                   | 13-6017 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Miami Children's Museum Charter School                  | 13-4000 | Active                                                                                                                                         | 307/41%                                                                                                 | A                                                                                              | \$1,687,875                                                                                        | 75%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy Charter School            | 13-0600 | Active                                                                                                                                         | 650/50%                                                                                                 | A                                                                                              | \$1,592,406                                                                                        | 30%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy Charter Middle School     | 13-6022 | Active                                                                                                                                         | 604/57%                                                                                                 | A                                                                                              | \$602,808                                                                                          | 14%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy High School               | 13-7053 | Active                                                                                                                                         | 412/67%                                                                                                 | A                                                                                              | \$471,723                                                                                          | 16%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Academy South Campus                          | 13-0342 | Active                                                                                                                                         | 732/61%                                                                                                 | A                                                                                              | \$1,340,997                                                                                        | 20%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Palm Academy                                  | 13-4634 | Active                                                                                                                                         | 18/0%                                                                                                   | N/A                                                                                            | \$6,987                                                                                            | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Pinecrest Academy (North Campus)                        | 13-5048 | Active                                                                                                                                         | 415/62%                                                                                                 | A                                                                                              | \$447,185                                                                                          | 13%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Academy Middle School (North Campus)          | 13-6003 | Active                                                                                                                                         | 22/73%                                                                                                  | A                                                                                              | \$14,106                                                                                           | 10%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Cove Academy                                  | 13-5049 | Active                                                                                                                                         | 715/53%                                                                                                 | A                                                                                              | \$495,063                                                                                          | 9%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy (Miami-Dade)                           | 13-0520 | Active                                                                                                                                         | 571/59%                                                                                                 | B                                                                                              | \$495,667                                                                                          | 11%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (Miami-Dade)             | 13-6004 | Active                                                                                                                                         | 230/67%                                                                                                 | A                                                                                              | \$487,286                                                                                          | 32%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy (Silver Palms)                         | 13-0332 | Active                                                                                                                                         | 631/81%                                                                                                 | A                                                                                              | \$100,385                                                                                          | 2%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy High School (Miami-Dade)               | 13-7042 | Active                                                                                                                                         | 345/78%                                                                                                 | A                                                                                              | \$287,250                                                                                          | 11%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy High School (South Campus)             | 13-7038 | Active                                                                                                                                         | 30/73%                                                                                                  | A                                                                                              | \$102,599                                                                                          | 51%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Preparatory Academy at Silver Palms            | 13-4012 | Active                                                                                                                                         | 640/82%                                                                                                 | B                                                                                              | \$100,385                                                                                          | 2%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset City Arts Academy                              | 13-2012 | Active                                                                                                                                         | 315/62%                                                                                                 | C                                                                                              | \$174,426                                                                                          | 6%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (Country Palms)          | 13-6043 | Active                                                                                                                                         | 28/64%                                                                                                  | A                                                                                              | \$105,126                                                                                          | 55%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Oaks Academy                                   | 13-3033 | Active                                                                                                                                         | 69/57%                                                                                                  | N/A                                                                                            | \$114,845                                                                                          | 23%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy Elementary School (South Miami Campus) | 13-2007 | Active                                                                                                                                         | 475/16%                                                                                                 | A                                                                                              | \$897,039                                                                                          | 21%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (South Miami)            | 13-6053 | Active                                                                                                                                         | 115/8%                                                                                                  | A                                                                                              | \$216,837                                                                                          | 29%                                                                                                        | No                                                                                                                  |

# **Addendum C - Applicant Worksheet History Schools Previously Operated by Management Company**

**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| District   | School Name                                                          | MSID    | Status<br>(Active/Closed) | Enrollment /FRL% | School<br>Grade/School<br>Improvement<br>Rating | Year End Fund<br>Balance | Unassigned Fund<br>Balance as<br>Percentage of<br>Total Revenue | Audit Finding<br>(Yes/No) |
|------------|----------------------------------------------------------------------|---------|---------------------------|------------------|-------------------------------------------------|--------------------------|-----------------------------------------------------------------|---------------------------|
| Dade       | Somerset Academy Charter Elementary School (South Homestead)         | 13-0339 | Active                    | 445/76%          | B                                               | \$1,041,118              | 29%                                                             | No                        |
| Dade       | Somerset Academy Charter Middle School (South Homestead)             | 13-6013 | Active                    | 184/78%          | A                                               | \$268,177                | 22%                                                             | No                        |
| Dade       | Somerset Academy Charter High School (South Homestead)               | 13-7034 | Active                    | 79/75%           | C                                               | \$64,060                 | 12%                                                             | No                        |
| Dade       | Somerset Gables Academy                                              | 13-5008 | Active                    | 294/10%          | A                                               | \$414,716                | 13%                                                             | No                        |
| Dade       | Somerset Academy Bay                                                 | 13-5062 | Active                    | 218/12%          | A                                               | \$184,773                | 7%                                                              | No                        |
| Dade       | Somerset Academy Bay Middle School                                   | 13-6128 | Active                    | 25/16%           | A                                               | \$13,708                 | 7%                                                              | No                        |
| Dade       | Somerset Academy Virtual Middle High School                          | 13-6016 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Middle School (Country Palms)                       | 06-5151 | Active                    | 870/33%          | A                                               | \$406,144                | 7%                                                              | No                        |
| Broward    | Somerset Academy                                                     | 06-5141 | Active                    | 938/31%          | A                                               | \$1,453,590              | 12%                                                             | No                        |
| Broward    | Somerset Academy High School                                         | 06-5221 | Active                    | 1,030/40%        | A                                               | \$886,551                | 12%                                                             | No                        |
| Broward    | Somerset Arts Conservatory                                           | 06-5396 | Active                    | 129/39%          | A                                               | \$919,127                | 106%                                                            | No                        |
| Broward    | Somerset Academy (Miramar Campus)                                    | 06-5405 | Active                    | 670/57%          | A                                               | \$2,740,540              | 48%                                                             | No                        |
| Broward    | Somerset Academy Middle School (Miramar Campus)                      | 06-5406 | Active                    | 449/65%          | A                                               | \$853,029                | 27%                                                             | No                        |
| Broward    | Somerset Academy Miramar South                                       | 06-5054 | Active                    | 78/41%           | N/A                                             | \$421,597                | 70%                                                             | No                        |
| Broward    | Somerset Academy (Davie)                                             | 06-5211 | Active                    | 144/45%          | A                                               | \$921,834                | 77%                                                             | No                        |
| Broward    | Somerset Academy East Preparatory                                    | 06-5391 | Active                    | 289/78%          | A                                               | \$1,148,905              | 48%                                                             | No                        |
| Broward    | Somerset Academy Hollywood                                           | 06-5387 | Active                    | 80/81%           | F                                               | \$55,240                 | 7%                                                              | No                        |
| Broward    | Somerset Academy Hollywood Middle School                             | 06-5419 | Active                    | 15/80%           | A                                               | \$4,733                  | 5%                                                              | No                        |
| Broward    | Somerset Academy Village                                             | 06-5004 | Active                    | 284/94%          | C                                               | \$794,251                | 33%                                                             | No                        |
| Broward    | Somerset Academy Village Charter Middle School                       | 06-5002 | Active                    | 128/91%          | C                                               | \$242,720                | 22%                                                             | No                        |
| Broward    | Somerset Preparatory Academy Charter School at North Lauderdale      | 06-5003 | Active                    | 786/97%          | D                                               | \$1,000,581              | 16%                                                             | No                        |
| Broward    | Somerset Preparatory Academy Charter High School at North Lauderdale | 06-5006 | Active                    | 192/97%          | C                                               | \$240,495                | 18%                                                             | No                        |
| Broward    | Somerset Academy Neighborhood School                                 | 06-5021 | Active                    | 504/74%          | A                                               | \$1,453,590              | 12%                                                             | No                        |
| Broward    | Somerset Preparatory Academy Charter Middle School                   | 06-5441 | Active                    | 337/72%          | A                                               | \$364,722                | 16%                                                             | No                        |
| Broward    | Somerset Academy Charter High School (Miramar Campus)                | 06-5007 | Active                    | 251/76%          | B                                               | \$146,198                | 8%                                                              | No                        |
| Broward    | Somerset Pines Academy                                               | 06-5030 | Active                    | 477/65%          | B                                               | \$604,299                | 17%                                                             | No                        |
| Broward    | Somerset Academy Pompano                                             | 06-5388 | Active                    | 159/79%          | F                                               | \$50,735                 | 4%                                                              | No                        |
| Broward    | Somerset Academy Pompano Middle School                               | 06-5413 | Active                    | 23/96%           | B                                               | \$36,031                 | 20%                                                             | No                        |
| Broward    | Ben Gamla Charter School                                             | 06-5410 | Active                    | 579/47%          | B                                               | \$110,354                | 2%                                                              | No                        |
| Broward    | Ben Gamla Charter School (North Campus)                              | 06-5001 | Active                    | 75/69%           | A                                               | \$1,737                  | 0%                                                              | No                        |
| Broward    | Ben Gamla South Broward                                              | 06-5392 | Active                    | 386/49%          | B                                               | \$3,525                  | 0%                                                              | No                        |
| Broward    | Ben Gamla Charter School (Hallandale Campus)                         | 06-5025 | Active                    | 28/50%           | C                                               | \$26,451                 | 14%                                                             | No                        |
| Broward    | Ben Gamla Charter High School                                        | 06-5005 | Active                    | 123/41%          | C                                               | \$4,150                  | 1%                                                              | No                        |
| Orange     | Cornerstone Charter Academy                                          | 48-0133 | Active                    | 892/3%           | A                                               | \$1,092,169              | 16%                                                             | No                        |
| Orange     | Cornerstone Charter High School                                      | 48-0146 | Active                    | 314/0%           | A                                               | \$216,744                | 10%                                                             | No                        |
| Orange     | Pinecrest Preparatory Charter School (Orlando Campus)                | 48-0155 | Active                    | 209/50%          | A                                               | \$159,511                | 10%                                                             | No                        |
| Orange     | Pinecrest Creek Academy                                              | 48-0203 | Active                    | 231/0%           | F                                               | \$39,561                 | 2%                                                              | No                        |
| Duval      | Somerset Academy (Eagle Campus)                                      | 16-1251 | Active                    | 259/51%          | C                                               | \$50,287                 | 2%                                                              | No                        |
| Duval      | Somerset Academy Charter Middle School (Eagle Campus)                | 16-1261 | Active                    | 136/46%          | B                                               | \$39,931                 | -4%                                                             | No                        |
| Duval      | Somerset Academy High School (Eagle Campus)                          | 16-1381 | Active                    | 21/52%           | F                                               | \$21,832                 | 9%                                                              | No                        |
| Duval      | Somerset Preparatory Academy                                         | 16-5501 | Active                    | 211/55%          | F                                               | \$186,117                | 35%                                                             | No                        |
| Palm Beach | Ben Gamla Charter School Palm Beach                                  | 50-3941 | Active                    | 281/21%          | A                                               | \$186,081                | 9%                                                              | No                        |
| Palm Beach | Somerset Academy Boca                                                | 50-3413 | Active                    | 284/24%          | B                                               | \$221,279                | 10%                                                             | No                        |
| Palm Beach | Somerset Academy Boca Middle                                         | 50-4041 | Active                    | 23/13%           | A                                               | \$180                    | 0%                                                              | No                        |
| Palm Beach | Somerset Academy Middle School                                       | 50-4012 | Active                    | 546/20%          | B                                               | -\$7                     | 0%                                                              | No                        |
| Palm Beach | Somerset Academy Canyons High School                                 | 50-4013 | Active                    | 118/23%          | B                                               | \$64,568                 | 6%                                                              | No                        |
| St. Lucie  | Somerset College Preparatory Academy                                 | 56-0712 | Active                    | 211/43%          | A                                               | \$24,920                 | 2%                                                              | No                        |
| Monroe     | Key West Collegiate School                                           | 44-0382 | Active                    | 72/35%           | C                                               | \$49,567                 | 8%                                                              | No                        |
| Dade       | Excelsior Language Academy of Hialeah                                | 13-5029 | Active                    | --               | --                                              | --                       | --                                                              | --                        |
| Dade       | Excelsior Academy High School                                        | 13-7054 | Active                    | --               | --                                              | --                       | --                                                              | --                        |
| Brevard    | Odyssey Charter School                                               | 05-6507 | Active                    | --               | --                                              | --                       | --                                                              | --                        |
| Brevard    | Palm Bay Community Charter                                           | 05-6519 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Brevard    | Palm Bay Municipal Charter High School                               | 05-6520 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Pinecrest Preparatory Charter High School (Orlando Campus)           | 48-0162 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Pinellas   | Ben Gamla Charter School                                             | 52-7321 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Monroe     | Key West Montessori Charter School                                   | 44-0351 | Active                    | 118/4%           | A                                               | \$222,436                | 19%                                                             | No                        |

\*See supporting documentation  
-- School did not have service agreement with ESP

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**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| ACADEMICA |                                                         |         | Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued | Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by | Applicant should indicate whether the independent financial audit included any of the following findings: financial |
|-----------|---------------------------------------------------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| District  | School Name                                             | MSID    | Status (Active/Closed)                                                                                                                         | Enrollment /FRL%                                                                                        | School Grade/School Improvement Rating                                                         | Year End Fund Balance                                                                              | Unassigned Fund Balance as Percentage of Total Revenue                                                     | Audit Finding (Yes/No)                                                                                              |
| Dade      | Mater Academy                                           | 13-0100 | Active                                                                                                                                         | 750/57%                                                                                                 | A                                                                                              | \$3,660,198                                                                                        | 66%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter School                       | 13-3100 | Active                                                                                                                                         | 622/86%                                                                                                 | A                                                                                              | \$2,021,696                                                                                        | 67%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter Middle School                | 13-6009 | Active                                                                                                                                         | 331/83%                                                                                                 | C                                                                                              | \$722,068                                                                                          | 34%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter High School                  | 13-7037 | Active                                                                                                                                         | 371/80%                                                                                                 | A                                                                                              | \$5,513                                                                                            | 0%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy of International Studies                  | 13-1017 | Active                                                                                                                                         | 506/88%                                                                                                 | D                                                                                              | \$148,241                                                                                          | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy Middle School of International Studies    | 13-6047 | Active                                                                                                                                         | 131/78%                                                                                                 | A                                                                                              | \$29,014                                                                                           | 3%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy High School of International Studies      | 13-7024 | Active                                                                                                                                         | 32/81%                                                                                                  | A                                                                                              | \$320,569                                                                                          | 118%                                                                                                       | No                                                                                                                  |
| Dade      | Mater Academy Middle School                             | 13-6012 | Active                                                                                                                                         | 1,424/81%                                                                                               | A                                                                                              | \$2,865,856                                                                                        | 30%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy High School                               | 13-7160 | Active                                                                                                                                         | 1,654/80%                                                                                               | A                                                                                              | \$3,173,447                                                                                        | 28%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Performing Arts & Entertainment Academy           | 13-7014 | Active                                                                                                                                         | 189/72%                                                                                                 | A                                                                                              | \$1,730,681                                                                                        | 134%                                                                                                       | No                                                                                                                  |
| Dade      | Mater Gardens Academy Elementary School                 | 13-0312 | Active                                                                                                                                         | 617/31%                                                                                                 | A                                                                                              | \$23,415                                                                                           | 1%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Gardens Academy Middle School                     | 13-6042 | Active                                                                                                                                         | 185/28%                                                                                                 | A                                                                                              | \$61,380                                                                                           | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Lakes Academy Middle School                       | 13-6033 | Active                                                                                                                                         | 721/74%                                                                                                 | A                                                                                              | \$1,457,501                                                                                        | 33%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Lakes Academy High School                         | 13-7018 | Active                                                                                                                                         | 926/74%                                                                                                 | A                                                                                              | \$2,936,826                                                                                        | 51%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy (Miami Beach)                             | 13-5047 | Active                                                                                                                                         | 528/60%                                                                                                 | B                                                                                              | \$426,730                                                                                          | 10%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy High School (Miami Beach)                 | 13-7025 | Active                                                                                                                                         | 18/72%                                                                                                  | N/A                                                                                            | \$17,640                                                                                           | 6%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Grove Academy                                     | 13-5045 | Active                                                                                                                                         | 105/50%                                                                                                 | B                                                                                              | \$165,712                                                                                          | 24%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Brickell Preparatory School                       | 13-5046 | Active                                                                                                                                         | 154/27%                                                                                                 | C                                                                                              | \$72,751                                                                                           | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy at Mt. Sinai                              | 13-5054 | Active                                                                                                                                         | 42/36%                                                                                                  | N/A                                                                                            | \$163,255                                                                                          | 33%                                                                                                        | No                                                                                                                  |
| Dade      | iMater Academy                                          | 13-5384 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | No                                                                                                                  |
| Dade      | iMater Academy Middle School                            | 13-6014 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | No                                                                                                                  |
| Dade      | iMater Preparatory Academy High School                  | 13-7090 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy Virtual Middle School                     | 13-6997 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | No                                                                                                                  |
| Dade      | Sports Leadership and Management Charter Middle School  | 13-6015 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | No                                                                                                                  |
| Dade      | Sports Leadership and Management Charter High School    | 13-7016 | Active                                                                                                                                         | 26/96%                                                                                                  | N/A                                                                                            | \$89,259                                                                                           | 43%                                                                                                        | No                                                                                                                  |
| Dade      | Ben Gamla Charter School                                | 13-5022 | Active                                                                                                                                         | 243/21%                                                                                                 | A                                                                                              | \$54,190                                                                                           | 3%                                                                                                         | No                                                                                                                  |
| Dade      | City of Hialeah Educational Academy                     | 13-7262 | Active                                                                                                                                         | 451/88%                                                                                                 | A                                                                                              | \$91,177                                                                                           | 3%                                                                                                         | No                                                                                                                  |
| Dade      | Doral Academy                                           | 13-3030 | Active                                                                                                                                         | 931/35%                                                                                                 | A                                                                                              | \$2,404,538                                                                                        | 31%                                                                                                        | No                                                                                                                  |
| Dade      | Just Arts and Management Middle School                  | 13-6083 | Active                                                                                                                                         | 93/44%                                                                                                  | B                                                                                              | \$196,932                                                                                          | 26%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy of Technology                             | 13-3029 | Active                                                                                                                                         | 202/46%                                                                                                 | A                                                                                              | \$462,681                                                                                          | 33%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy Charter Middle School                     | 13-6030 | Active                                                                                                                                         | 931/57%                                                                                                 | A                                                                                              | \$2,969,656                                                                                        | 59%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy Charter High School                       | 13-7020 | Active                                                                                                                                         | 1,273/56%                                                                                               | A                                                                                              | \$163,741                                                                                          | 2%                                                                                                         | No                                                                                                                  |
| Dade      | Doral Performing Arts and Entertainment Academy         | 13-7009 | Active                                                                                                                                         | 307/53%                                                                                                 | A                                                                                              | \$116,267                                                                                          | 6%                                                                                                         | No                                                                                                                  |
| Dade      | Theodore R. and Thelma A. Gibson Charter School         | 13-2060 | Active                                                                                                                                         | 250/69%                                                                                                 | C                                                                                              | \$57,844                                                                                           | 2%                                                                                                         | No                                                                                                                  |
| Dade      | Integrated Science and Asian Culture Academy            | 13-2004 | Active                                                                                                                                         | 26/15%                                                                                                  | N/A                                                                                            | \$90,322                                                                                           | 51%                                                                                                        | No                                                                                                                  |
| Dade      | International Studies Charter Middle School             | 13-6045 | Active                                                                                                                                         | 262/66%                                                                                                 | A                                                                                              | \$52,451                                                                                           | 3%                                                                                                         | No                                                                                                                  |
| Dade      | International Studies Charter High School               | 13-7007 | Active                                                                                                                                         | 356/62%                                                                                                 | A                                                                                              | \$12,912                                                                                           | 1%                                                                                                         | No                                                                                                                  |
| Dade      | International Studies Virtual Academy                   | 13-6017 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            |                                                                                                    |                                                                                                            | No                                                                                                                  |
| Dade      | Miami Children's Museum Charter School                  | 13-4000 | Active                                                                                                                                         | 302/24%                                                                                                 | B                                                                                              | \$1,454,488                                                                                        | 71%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy Charter School            | 13-0600 | Active                                                                                                                                         | 650/47%                                                                                                 | A                                                                                              | \$1,867,187                                                                                        | 53%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy Charter Middle School     | 13-6022 | Active                                                                                                                                         | 694/60%                                                                                                 | A                                                                                              | \$723,225                                                                                          | 17%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy High School               | 13-7053 | Active                                                                                                                                         | 329/60%                                                                                                 | A                                                                                              | \$512,044                                                                                          | 25%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Academy South Campus                          | 13-0342 | Active                                                                                                                                         | 750/59%                                                                                                 | A                                                                                              | \$1,455,516                                                                                        | 25%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Palm Academy                                  | 13-4634 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            |                                                                                                    |                                                                                                            | No                                                                                                                  |
| Dade      | Pinecrest Academy (North Campus)                        | 13-5048 | Active                                                                                                                                         | 419/66%                                                                                                 | A                                                                                              | \$221,850                                                                                          | 7%                                                                                                         | No                                                                                                                  |
| Dade      | Pinecrest Academy Middle School (North Campus)          | 13-6003 | Active                                                                                                                                         | 19/74%                                                                                                  | N/A                                                                                            | \$4,488                                                                                            | 2%                                                                                                         | No                                                                                                                  |
| Dade      | Pinecrest Cove Academy                                  | 13-5049 | Active                                                                                                                                         | 639/51%                                                                                                 | A                                                                                              | \$220,853                                                                                          | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy (Miami-Dade)                           | 13-0520 | Active                                                                                                                                         | 175/49%                                                                                                 | A                                                                                              | \$148,938                                                                                          | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (Miami-Dade)             | 13-6004 | Active                                                                                                                                         | 222/50%                                                                                                 | A                                                                                              | \$359,633                                                                                          | 26%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy (Silver Palms)                         | 13-0332 | Active                                                                                                                                         | 637/84%                                                                                                 | A                                                                                              | \$187,858                                                                                          | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy High School (Miami-Dade)               | 13-7042 | Active                                                                                                                                         | 343/80%                                                                                                 | A                                                                                              | \$403,913                                                                                          | 17%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy High School (South Campus)             | 13-7038 | Active                                                                                                                                         | 4/100%                                                                                                  | N/A                                                                                            | \$71,115                                                                                           | 261%                                                                                                       | No                                                                                                                  |
| Dade      | Somerset Preparatory Academy at Silver Palms            | 13-4012 | Active                                                                                                                                         | 612/85%                                                                                                 | B                                                                                              | \$187,858                                                                                          | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset City Arts Academy                              | 13-2012 | Active                                                                                                                                         | 296/30%                                                                                                 | C                                                                                              | \$132,946                                                                                          | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (Country Palms)          | 13-6043 | Active                                                                                                                                         | 38/24%                                                                                                  | C                                                                                              | \$68,963                                                                                           | 30%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Oaks Academy                                   | 13-3033 | Active                                                                                                                                         | 54/24%                                                                                                  | N/A                                                                                            | \$46,073                                                                                           | 8%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Elementary School (South Miami Campus) | 13-2007 | Active                                                                                                                                         | 476/15%                                                                                                 | A                                                                                              | \$598,933                                                                                          | 15%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (South Miami)            | 13-6053 | Active                                                                                                                                         | 131/18%                                                                                                 | A                                                                                              | \$147,518                                                                                          | 19%                                                                                                        | No                                                                                                                  |

# **Addendum C - Applicant Worksheet History Schools Previously Operated by Management Company**

**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| District   | School Name                                                          | MSID    | Status<br>(Active/Closed) | Enrollment /FRL% | School<br>Grade/School<br>Improvement<br>Rating | Year End Fund<br>Balance | Unassigned Fund<br>Balance as<br>Percentage of<br>Total Revenue | Audit Finding<br>(Yes/No) |
|------------|----------------------------------------------------------------------|---------|---------------------------|------------------|-------------------------------------------------|--------------------------|-----------------------------------------------------------------|---------------------------|
| Dade       | Somerset Academy Charter Elementary School (South Homestead)         | 13-0339 | Active                    | 315/73%          | B                                               | \$551,280                | 22%                                                             | No                        |
| Dade       | Somerset Academy Charter Middle School (South Homestead)             | 13-6013 | Active                    | 134/75%          | A                                               | \$200,615                | 25%                                                             | No                        |
| Dade       | Somerset Academy Charter High School (South Homestead)               | 13-7034 | Active                    | 41/78%           | N/A                                             | \$15,896                 | 3%                                                              | No                        |
| Dade       | Somerset Gables Academy                                              | 13-5008 | Active                    | 231/4%           | N/A                                             | \$321,017                | 14%                                                             | No                        |
| Dade       | Somerset Academy Bay                                                 | 13-5062 | Active                    | N/A              | N/A                                             |                          |                                                                 | No                        |
| Dade       | Somerset Academy Bay Middle School                                   | 13-6128 | Active                    | N/A              | N/A                                             |                          |                                                                 | No                        |
| Dade       | Somerset Academy Virtual Middle High School                          | 13-6016 | Active                    | N/A              | N/A                                             |                          |                                                                 | No                        |
| Dade       | Somerset Academy Middle School (Country Palms)                       | 06-5151 | Active                    | 868/32           | A                                               | \$419,022                | 8%                                                              | No                        |
| Broward    | Somerset Academy                                                     | 06-5141 | Active                    | 895/36%          | A                                               | \$227,621                | 2%                                                              | No                        |
| Broward    | Somerset Academy High School                                         | 06-5221 | Active                    | 853/36           | A                                               | \$702,884                | 12%                                                             | No                        |
| Broward    | Somerset Arts Conservatory                                           | 06-5396 | Active                    | 163/37%          | A                                               | \$695,169                | 69%                                                             | No                        |
| Broward    | Somerset Academy (Miramar Campus)                                    | 06-5405 | Active                    | 722/63%          | A                                               | \$2,490,987              | 13%                                                             | No                        |
| Broward    | Somerset Academy Middle School (Miramar Campus)                      | 06-5406 | Active                    | 391/68%          | A                                               | \$512,017                | 20%                                                             | No                        |
| Broward    | Somerset Academy Miramar South                                       | 06-5054 | Active                    | 79/57%           | N/A                                             | \$208,570                | 37%                                                             | No                        |
| Broward    | Somerset Academy (Davie)                                             | 06-5211 | Active                    | 149/36%          | A                                               | \$778,162                | 72%                                                             | No                        |
| Broward    | Somerset Academy East Preparatory                                    | 06-5391 | Active                    | 297/80%          | A                                               | \$942,097                | 42%                                                             | No                        |
| Broward    | Somerset Academy Hollywood                                           | 06-5387 | Active                    | N/A              | N/A                                             |                          |                                                                 | No                        |
| Broward    | Somerset Academy Hollywood Middle School                             | 06-5419 | Active                    | N/A              | N/A                                             |                          |                                                                 | No                        |
| Broward    | Somerset Academy Village                                             | 06-5004 | Active                    | 302/89%          | C                                               | \$715,931                | 32%                                                             | No                        |
| Broward    | Somerset Academy Village Charter Middle School                       | 06-5002 | Active                    | 161/87%          | D                                               | \$91,322                 | 7%                                                              | No                        |
| Broward    | Somerset Preparatory Academy Charter School at North Lauderdale      | 06-5003 | Active                    | 788/91%          | C                                               | \$463,756                | 8%                                                              | No                        |
| Broward    | Somerset Preparatory Academy Charter High School at North Lauderdale | 06-5006 | Active                    | 144/80%          | B                                               | \$115,339                | 13%                                                             | No                        |
| Broward    | Somerset Academy Neighborhood School                                 | 06-5021 | Active                    | 468/66%          | B                                               | \$227,621                | 2%                                                              | No                        |
| Broward    | Somerset Preparatory Academy Charter Middle School                   | 06-5441 | Active                    | 338/69%          | C                                               | \$98,938                 | 5%                                                              | No                        |
| Broward    | Somerset Academy Charter High School (Miramar Campus)                | 06-5007 | Active                    | 224/73%          | B                                               | \$73,426                 | 4%                                                              | No                        |
| Broward    | Somerset Pines Academy                                               | 06-5030 | Active                    | 429/59%          | C                                               | \$356,210                | 12%                                                             | No                        |
| Broward    | Somerset Academy Pompano                                             | 06-5388 | Active                    | 145/78%          | N/A                                             | \$33,887                 | 3%                                                              | No                        |
| Broward    | Somerset Academy Pompano Middle School                               | 06-5413 | Active                    | N/A              | N/A                                             |                          |                                                                 | No                        |
| Broward    | Ben Gamla Charter School                                             | 06-5410 | Active                    | 578/47%          | A                                               | \$807                    | 0%                                                              | No                        |
| Broward    | Ben Gamla Charter School (North Campus)                              | 06-5001 | Active                    | 70/66%           | A                                               | \$7,627                  | 2%                                                              | No                        |
| Broward    | Ben Gamla South Broward                                              | 06-5392 | Active                    | 453/32%          | C                                               | \$51,061                 | 2%                                                              | No                        |
| Broward    | Ben Gamla Charter School (Hallandale Campus)                         | 06-5025 | Active                    | 18/28%           | N/A                                             | \$5,305                  | 5%                                                              | No                        |
| Broward    | Ben Gamla Charter High School                                        | 06-5005 | Active                    | 100/34%          | C                                               | \$12,482                 | 1%                                                              | No                        |
| Orange     | Cornerstone Charter Academy                                          | 48-0133 | Active                    | 832/17%          | B                                               | \$1,068,034              | 18%                                                             | No                        |
| Orange     | Cornerstone Charter High School                                      | 48-0146 | Active                    | 233/17%          | A                                               | \$25,236                 | 2%                                                              | No                        |
| Orange     | Pinecrest Preparatory Charter School (Orlando Campus)                | 48-0155 | Active                    | 173/40%          | A                                               | \$132,842                | 10%                                                             | No                        |
| Orange     | Pinecrest Creek Academy                                              | 48-0203 | Active                    | 123/44%          | N/A                                             | \$72,529                 | 8%                                                              | No                        |
| Duval      | Somerset Academy (Eagle Campus)                                      | 16-1251 | Active                    | 276/41%          | B                                               | \$2,062                  | 0%                                                              | No                        |
| Duval      | Somerset Academy Charter Middle School (Eagle Campus)                | 16-1261 | Active                    | 135/36%          | A                                               | \$21,369                 | 2%                                                              | No                        |
| Duval      | Somerset Academy High School (Eagle Campus)                          | 16-1381 | Active                    | 22/45%           | N/A                                             | \$24,760                 | 13%                                                             | No                        |
| Duval      | Somerset Preparatory Academy                                         | 16-5501 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Ben Gamla Charter School Palm Beach                                  | 50-3941 | Active                    | 281/14%          | A                                               | \$231,291                | 11%                                                             | No                        |
| Palm Beach | Somerset Academy Boca                                                | 50-3413 | Active                    | 165/19%          | N/A                                             | \$119,765                | 9%                                                              | No                        |
| Palm Beach | Somerset Academy Boca Middle                                         | 50-4041 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | No                        |
| Palm Beach | Somerset Academy Middle School                                       | 50-4012 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | No                        |
| Palm Beach | Somerset Academy Canyons High School                                 | 50-4013 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | No                        |
| St. Lucie  | Somerset College Preparatory Academy                                 | 56-0712 | Active                    | 112/58%          | C                                               | \$16,458                 | 2%                                                              | No                        |
| Monroe     | Key West Collegiate School                                           | 44-0382 | Active                    | 52/38%           | N/A                                             | \$42,059                 | 9%                                                              | No                        |
| Dade       | Excelsior Language Academy of Hialeah                                | 13-5029 | Active                    | --               | --                                              | --                       | --                                                              | --                        |
| Dade       | Excelsior Academy High School                                        | 13-7054 | Active                    | --               | --                                              | --                       | --                                                              | --                        |
| Brevard    | Odyssey Charter School                                               | 05-6507 | Active                    | 758/62%          | A                                               | \$1,299,637              | 22%                                                             | No                        |
| Brevard    | Palm Bay Community Charter                                           | 05-6519 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Brevard    | Palm Bay Municipal Charter High School                               | 05-6520 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Pinecrest Preparatory Charter High School (Orlando Campus)           | 48-0162 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Pinellas   | Ben Gamla Charter School                                             | 52-7321 | Closed*                   | 44/32%           | N/A                                             | \$0                      | 0%                                                              | N/A                       |
| Monroe     | Key West Montessori Charter School                                   | 44-0351 | Active                    | --               | --                                              | --                       | --                                                              | --                        |

\*See supporting documentation  
-- School did not have service agreement with ESP

# **Addendum C - Applicant Worksheet History Schools Previously Operated by Management Company**

**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| ACADEMICA |                                                         |         | Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued | Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by | Applicant should indicate whether the independent financial audit included any of the following findings: financial |
|-----------|---------------------------------------------------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| 2012      |                                                         |         |                                                                                                                                                |                                                                                                         |                                                                                                |                                                                                                    |                                                                                                            |                                                                                                                     |
| District  | School Name                                             | MSID    | Status (Active/Closed)                                                                                                                         | Enrollment /FRL%                                                                                        | School Grade/School Improvement Rating                                                         | Year End Fund Balance                                                                              | Unassigned Fund Balance as Percentage of Total Revenue                                                     | Audit Finding (Yes/No)                                                                                              |
| Dade      | Mater Academy                                           | 13-0100 | Active                                                                                                                                         | 750/79%                                                                                                 | A                                                                                              | \$7,700,050                                                                                        | 147%                                                                                                       | No                                                                                                                  |
| Dade      | Mater Academy East Charter School                       | 13-3100 | Active                                                                                                                                         | 546/79%                                                                                                 | A                                                                                              | \$1,816,205                                                                                        | 45%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter Middle School                | 13-6009 | Active                                                                                                                                         | 334/93%                                                                                                 | C                                                                                              | \$643,190                                                                                          | 30%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter High School                  | 13-7037 | Active                                                                                                                                         | 290/82%                                                                                                 | B                                                                                              | \$106,659                                                                                          | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy of International Studies                  | 13-1017 | Active                                                                                                                                         | 453/90%                                                                                                 | C                                                                                              | \$462,003                                                                                          | 13%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy Middle School of International Studies    | 13-6047 | Active                                                                                                                                         | 123/85%                                                                                                 | A                                                                                              | \$112,041                                                                                          | 13%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy High School of International Studies      | 13-7024 | Active                                                                                                                                         | 100/83%                                                                                                 | A                                                                                              | \$296,577                                                                                          | 47%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy Middle School                             | 13-6012 | Active                                                                                                                                         | 1,454/80%                                                                                               | A                                                                                              | \$4,526,614                                                                                        | 49%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy High School                               | 13-7160 | Active                                                                                                                                         | 1,317/79%                                                                                               | A                                                                                              | \$4,077,088                                                                                        | 40%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Performing Arts & Entertainment Academy           | 13-7014 | Active                                                                                                                                         | 210/74%                                                                                                 | A                                                                                              | \$2,364,166                                                                                        | 92%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Gardens Academy Elementary School                 | 13-0312 | Active                                                                                                                                         | 549/51%                                                                                                 | A                                                                                              | \$107,442                                                                                          | 3%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Gardens Academy Middle School                     | 13-6042 | Active                                                                                                                                         | 254/65%                                                                                                 | A                                                                                              | \$68,620                                                                                           | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Lakes Academy Middle School                       | 13-6033 | Active                                                                                                                                         | 579/76%                                                                                                 | A                                                                                              | \$1,026,652                                                                                        | 30%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Lakes Academy High School                         | 13-7018 | Active                                                                                                                                         | 1012/72%                                                                                                | B                                                                                              | \$2,324,047                                                                                        | 41%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy (Miami Beach)                             | 13-5047 | Active                                                                                                                                         | 477/68%                                                                                                 | A                                                                                              | \$232,588                                                                                          | 6%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy High School (Miami Beach)                 | 13-7025 | Active                                                                                                                                         | 17/82%                                                                                                  | N/A                                                                                            | \$4,749                                                                                            | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Grove Academy                                     | 13-5045 | Active                                                                                                                                         | 126/64%                                                                                                 | N/A                                                                                            | \$51,051                                                                                           | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Brickell Preparatory School                       | 13-5046 | Active                                                                                                                                         | 19/42%                                                                                                  | N/A                                                                                            | \$22,097                                                                                           | 13%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy at Mt. Sinai                              | 13-5054 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | iMater Academy                                          | 13-5384 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | iMater Academy Middle School                            | 13-6014 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | iMater Preparatory Academy High School                  | 13-7090 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Mater Academy Virtual Middle School                     | 13-6997 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Sports Leadership and Management Charter Middle School  | 13-6015 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Sports Leadership and Management Charter High School    | 13-7016 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Ben Gamla Charter School                                | 13-5022 | Active                                                                                                                                         | 163/29%                                                                                                 | A                                                                                              | \$304                                                                                              | 0%                                                                                                         | No                                                                                                                  |
| Dade      | City of Hialeah Educational Academy                     | 13-7262 | Active                                                                                                                                         | 394/90%                                                                                                 | A                                                                                              | \$153,265                                                                                          | 6%                                                                                                         | No                                                                                                                  |
| Dade      | Doral Academy                                           | 13-3030 | Active                                                                                                                                         | 795/37%                                                                                                 | A                                                                                              | \$2,801,640                                                                                        | 47%                                                                                                        | No                                                                                                                  |
| Dade      | Just Arts and Management Middle School                  | 13-6083 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Doral Academy of Technology                             | 13-3029 | Active                                                                                                                                         | 109/40%                                                                                                 | A                                                                                              | \$197,102                                                                                          | 23%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy Charter Middle School                     | 13-6030 | Active                                                                                                                                         | 1,241/58%                                                                                               | A                                                                                              | \$2,005,491                                                                                        | 25%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy Charter High School                       | 13-7020 | Active                                                                                                                                         | 1,163/60%                                                                                               | A                                                                                              | \$949,682                                                                                          | 11%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Performing Arts and Entertainment Academy         | 13-7009 | Active                                                                                                                                         | 225/54%                                                                                                 | A                                                                                              | \$704,352                                                                                          | 49%                                                                                                        | No                                                                                                                  |
| Dade      | Theodore R. and Thelma A. Gibson Charter School         | 13-2060 | Active                                                                                                                                         | 279/89%                                                                                                 | D                                                                                              | \$159,554                                                                                          | 7%                                                                                                         | No                                                                                                                  |
| Dade      | Integrated Science and Asian Culture Academy            | 13-2004 | Active                                                                                                                                         | 26/12%                                                                                                  | N/A                                                                                            | \$53,993                                                                                           | 32%                                                                                                        | No                                                                                                                  |
| Dade      | International Studies Charter Middle School             | 13-6045 | Active                                                                                                                                         | 225/67%                                                                                                 | A                                                                                              | \$62,462                                                                                           | 4%                                                                                                         | No                                                                                                                  |
| Dade      | International Studies Charter High School               | 13-7007 | Active                                                                                                                                         | 353/56%                                                                                                 | A                                                                                              | \$38,578                                                                                           | 2%                                                                                                         | No                                                                                                                  |
| Dade      | International Studies Virtual Academy                   | 13-6017 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Miami Children's Museum Charter School                  | 13-4000 | Active                                                                                                                                         | 263/49%                                                                                                 | A                                                                                              | \$1,243,800                                                                                        | 70%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy Charter School            | 13-0600 | Active                                                                                                                                         | 650/43%                                                                                                 | A                                                                                              | \$1,258,446                                                                                        | 27%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy Charter Middle School     | 13-6022 | Active                                                                                                                                         | 772/59%                                                                                                 | A                                                                                              | \$578,141                                                                                          | 12%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy High School               | 13-7053 | Active                                                                                                                                         | 228/52%                                                                                                 | C                                                                                              | \$346,109                                                                                          | 25%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Academy South Campus                          | 13-0342 | Active                                                                                                                                         | 349/58%                                                                                                 | A                                                                                              | \$629,658                                                                                          | 12%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Palm Academy                                  | 13-4634 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Academy (North Campus)                        | 13-5048 | Active                                                                                                                                         | 389/70%                                                                                                 | A                                                                                              | \$142,091                                                                                          | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Pinecrest Academy Middle School (North Campus)          | 13-6003 | Active                                                                                                                                         | 15/80%                                                                                                  | N/A                                                                                            | \$7,199                                                                                            | 5%                                                                                                         | No                                                                                                                  |
| Dade      | Pinecrest Cove Academy                                  | 13-5049 | Active                                                                                                                                         | 432/58%                                                                                                 | A                                                                                              | \$2,513                                                                                            | 0%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy (Miami-Dade)                           | 13-0520 | Active                                                                                                                                         | 546/57%                                                                                                 | A                                                                                              | \$159,511                                                                                          | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (Miami-Dade)             | 13-6004 | Active                                                                                                                                         | 227/54%                                                                                                 | A                                                                                              | \$304,650                                                                                          | 22%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy (Silver Palms)                         | 13-0332 | Active                                                                                                                                         | 623/82%                                                                                                 | A                                                                                              | \$282,124                                                                                          | 6%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy High School (Miami-Dade)               | 13-7042 | Active                                                                                                                                         | 366/82%                                                                                                 | A                                                                                              | \$494,331                                                                                          | 20%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy High School (South Campus)             | 13-7038 | Active                                                                                                                                         | 5/100%                                                                                                  | N/A                                                                                            | \$85,648                                                                                           | 221%                                                                                                       | No                                                                                                                  |
| Dade      | Somerset Preparatory Academy at Silver Palms            | 13-4012 | Active                                                                                                                                         | 479/82%                                                                                                 | A                                                                                              | \$282,124                                                                                          | 6%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset City Arts Academy                              | 13-2012 | Active                                                                                                                                         | 243/52%                                                                                                 | B                                                                                              | \$118,820                                                                                          | 6%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (Country Palms)          | 13-6043 | Active                                                                                                                                         | 18/61%                                                                                                  | N/A                                                                                            | \$70,062                                                                                           | 39%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Oaks Academy                                   | 13-3033 | Active                                                                                                                                         | 18/39%                                                                                                  | N/A                                                                                            | \$30,194                                                                                           | 21%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy Elementary School (South Miami Campus) | 13-2007 | Active                                                                                                                                         | 456/14%                                                                                                 | A                                                                                              | \$504,433                                                                                          | 13%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (South Miami)            | 13-6053 | Active                                                                                                                                         | 116/15%                                                                                                 | A                                                                                              | \$81,818                                                                                           | 12%                                                                                                        | No                                                                                                                  |

**Addendum C - Applicant Worksheet History  
Schools Previously Operated  
by Management Company**

**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| District   | School Name                                                          | MSID    | Status<br>(Active/Closed) | Enrollment /FRL% | School<br>Grade/School<br>Improvement<br>Rating | Year End Fund<br>Balance | Unassigned Fund<br>Balance as<br>Percentage of<br>Total Revenue | Audit Finding<br>(Yes/No) |
|------------|----------------------------------------------------------------------|---------|---------------------------|------------------|-------------------------------------------------|--------------------------|-----------------------------------------------------------------|---------------------------|
| Dade       | Somerset Academy Charter Elementary School (South Homestead)         | 13-0339 | Active                    | 316/73%          | B                                               | \$440,096                | 19%                                                             | No                        |
| Dade       | Somerset Academy Charter Middle School (South Homestead)             | 13-6013 | Active                    | 114/72%          | B                                               | \$185,352                | 27%                                                             | No                        |
| Dade       | Somerset Academy Charter High School (South Homestead)               | 13-7034 | Active                    | 20/70%           | N/A                                             | \$1,516                  | 1%                                                              | No                        |
| Dade       | Somerset Gables Academy                                              | 13-5008 | Active                    | 75/1%            | N/A                                             | \$290,359                | 26%                                                             | No                        |
| Dade       | Somerset Academy Bay                                                 | 13-5062 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Bay Middle School                                   | 13-6128 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Virtual Middle High School                          | 13-6016 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Middle School (Country Palms)                       | 06-5151 | Active                    | 842/38%          | A                                               | \$70,062                 | 39%                                                             | No                        |
| Broward    | Somerset Academy                                                     | 06-5141 | Active                    | 886/35%          | A                                               | \$80,856                 | 1%                                                              | No                        |
| Broward    | Somerset Academy High School                                         | 06-5221 | Active                    | 755/43%          | A                                               | \$37,014                 | 1%                                                              | No                        |
| Broward    | Somerset Arts Conservatory                                           | 06-5396 | Active                    | 91/47%           | A                                               | \$421,087                | 75%                                                             | No                        |
| Broward    | Somerset Academy (Miramar Campus)                                    | 06-5405 | Active                    | 811/62%          | A                                               | \$2,260,864              | 37%                                                             | No                        |
| Broward    | Somerset Academy Middle School (Miramar Campus)                      | 06-5406 | Active                    | 357/67%          | A                                               | \$388,429                | 17%                                                             | No                        |
| Broward    | Somerset Academy Miramar South                                       | 06-5054 | Active                    | N/A              | N/A                                             | \$2,260,864              | 37%                                                             | No                        |
| Broward    | Somerset Academy (Davie)                                             | 06-5211 | Active                    | 141/40%          | A                                               | \$695,352                | 67%                                                             | No                        |
| Broward    | Somerset Academy East Preparatory                                    | 06-5391 | Active                    | 299/82%          | A                                               | \$689,025                | 31%                                                             | No                        |
| Broward    | Somerset Academy Hollywood                                           | 06-5387 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Hollywood Middle School                             | 06-5419 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Village                                             | 06-5004 | Active                    | 348/83%          | C                                               | \$619,330                | 25%                                                             | No                        |
| Broward    | Somerset Academy Village Charter Middle School                       | 06-5002 | Active                    | 141/84%          | C                                               | \$111,142                | 10%                                                             | No                        |
| Broward    | Somerset Preparatory Academy Charter School at North Lauderdale      | 06-5003 | Active                    | 687/85%          | C                                               | \$195,071                | 4%                                                              | No                        |
| Broward    | Somerset Preparatory Academy Charter High School at North Lauderdale | 06-5006 | Active                    | 114/73%          | F                                               | \$30,101                 | 3%                                                              | No                        |
| Broward    | Somerset Academy Neighborhood School                                 | 06-5021 | Active                    | 441/60%          | A                                               | \$80,856                 | 1%                                                              | No                        |
| Broward    | Somerset Preparatory Academy Charter Middle School                   | 06-5441 | Active                    | 317/67%          | B                                               | \$25,966                 | 5%                                                              | No                        |
| Broward    | Somerset Academy Charter High School (Miramar Campus)                | 06-5007 | Active                    | 213/54%          | A                                               | \$101,535                | 6%                                                              | No                        |
| Broward    | Somerset Pines Academy                                               | 06-5030 | Active                    | 380/64%          | C                                               | \$325,297                | 11%                                                             | No                        |
| Broward    | Somerset Academy Pompano                                             | 06-5388 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Pompano Middle School                               | 06-5413 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Ben Gamla Charter School                                             | 06-5410 | Active                    | 531/50%          | A                                               | -\$213,516               | -5%                                                             | No                        |
| Broward    | Ben Gamla Charter School (North Campus)                              | 06-5001 | Active                    | 50/64%           | B                                               | \$23,990                 | 5%                                                              | No                        |
| Broward    | Ben Gamla South Broward                                              | 06-5392 | Active                    | 344/34%          | C                                               | -\$108,119               | -5%                                                             | No                        |
| Broward    | Ben Gamla Charter School (Hallandale Campus)                         | 06-5025 | Active                    | 18/28%           | N/A                                             | -\$217                   | 0%                                                              | No                        |
| Broward    | Ben Gamla Charter High School                                        | 06-5005 | Active                    | 40/38%           | N/A                                             | \$1,763                  | 1%                                                              | No                        |
| Orange     | Cornerstone Charter Academy                                          | 48-0133 | Active                    | 738/18%          | A                                               | \$600,136                | 12%                                                             | No                        |
| Orange     | Cornerstone Charter High School                                      | 48-0146 | Active                    | 201/22%          | A                                               | \$9,231                  | 1%                                                              | No                        |
| Orange     | Pinecrest Preparatory Charter School (Orlando Campus)                | 48-0155 | Active                    | 135/51%          | B                                               | \$190,032                | 16%                                                             | No                        |
| Orange     | Pinecrest Creek Academy                                              | 48-0203 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Duval      | Somerset Academy (Eagle Campus)                                      | 16-1251 | Active                    | 231/32%          | A                                               | \$33,131                 | 2%                                                              | No                        |
| Duval      | Somerset Academy Charter Middle School (Eagle Campus)                | 16-1261 | Active                    | 111/35%          | B                                               | \$120,904                | 15%                                                             | No                        |
| Duval      | Somerset Academy High School (Eagle Campus)                          | 16-1381 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Duval      | Somerset Preparatory Academy                                         | 16-5501 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Ben Gamla Charter School Palm Beach                                  | 50-3941 | Active                    | 195/7%           | N/A                                             | -\$13,088                | -1%                                                             | No                        |
| Palm Beach | Somerset Academy Boca                                                | 50-3413 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Boca Middle                                         | 50-4041 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Middle School                                       | 50-4012 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Canyons High School                                 | 50-4013 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| St. Lucie  | Somerset College Preparatory Academy                                 | 56-0712 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Monroe     | Key West Collegiate School                                           | 44-0382 | Active                    | 30/38%           | N/A                                             | \$3,502                  | 1%                                                              | No                        |
| Dade       | Excelsior Language Academy of Hialeah                                | 13-5029 | Active                    | 577/92%          | B                                               | \$36,986                 | 1%                                                              | No                        |
| Dade       | Excelsior Academy High School                                        | 13-7054 | Closed*                   | 64/95%           | B                                               | \$7,406                  | 1%                                                              | No                        |
| Brevard    | Odyssey Charter School                                               | 05-6507 | Active                    | 625/66%          | N/A                                             | \$1,214,409              | 24%                                                             |                           |
| Brevard    | Palm Bay Community Charter                                           | 05-6519 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Brevard    | Palm Bay Municipal Charter High School                               | 05-6520 | Closed*                   | N/A              | N/A                                             | \$119,893                | 33%                                                             | N/A                       |
| Orange     | Pinecrest Preparatory Charter High School (Orlando Campus)           | 48-0162 | Closed*                   | 5/0%             | N/A                                             | \$27,049                 | 28%                                                             | N/A                       |
| Pinellas   | Ben Gamla Charter School                                             | 52-7321 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Monroe     | Key West Montessori Charter School                                   | 44-0351 | Active                    | --               | --                                              | --                       | --                                                              | --                        |

\*See supporting documentation  
-- School did not have service agreement with ESP

# **Addendum C - Applicant Worksheet History Schools Previously Operated by Management Company**

**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| ACADEMICA |                                                         |         | Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure with | Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible | Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued | Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in | Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by | Applicant should indicate whether the independent financial audit included any of the following findings: financial |
|-----------|---------------------------------------------------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| District  | School Name                                             | MSID    | Status (Active/Closed)                                                                                                                         | Enrollment /FRL%                                                                                        | School Grade/School Improvement Rating                                                         | Year End Fund Balance                                                                              | Unassigned Fund Balance as Percentage of Total Revenue                                                     | Audit Finding (Yes/No)                                                                                              |
| Dade      | Mater Academy                                           | 13-0100 | Active                                                                                                                                         | 738/77%                                                                                                 | A                                                                                              | \$7,149,599                                                                                        | 123%                                                                                                       | No                                                                                                                  |
| Dade      | Mater Academy East Charter School                       | 13-3100 | Active                                                                                                                                         | 537/88%                                                                                                 | A                                                                                              | \$1,580,822                                                                                        | 36%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter Middle School                | 13-6009 | Active                                                                                                                                         | 330/88%                                                                                                 | C                                                                                              | \$534,073                                                                                          | 22%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy East Charter High School                  | 13-7037 | Active                                                                                                                                         | 246/80%                                                                                                 | B                                                                                              | \$180,630                                                                                          | 8%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy of International Studies                  | 13-1017 | Active                                                                                                                                         | 376/88%                                                                                                 | C                                                                                              | \$446,609                                                                                          | 14%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy Middle School of International Studies    | 13-6047 | Active                                                                                                                                         | 114/34%                                                                                                 | A                                                                                              | \$30,426                                                                                           | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy High School of International Studies      | 13-7024 | Active                                                                                                                                         | 60/78%                                                                                                  | N/A                                                                                            | \$137,131                                                                                          | 19%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy Middle School                             | 13-6012 | Active                                                                                                                                         | 1,297/81%                                                                                               | A                                                                                              | \$4,142,879                                                                                        | 44%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy High School                               | 13-7160 | Active                                                                                                                                         | 1446/80%                                                                                                | A                                                                                              | \$3,832,251                                                                                        | 34%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Performing Arts & Entertainment Academy           | 13-7014 | Active                                                                                                                                         | 175/77%                                                                                                 | A                                                                                              | \$2,191,607                                                                                        | 163%                                                                                                       | No                                                                                                                  |
| Dade      | Mater Gardens Academy Elementary School                 | 13-0312 | Active                                                                                                                                         | 544/60%                                                                                                 | A                                                                                              | \$16,920                                                                                           | 0%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Gardens Academy Middle School                     | 13-6042 | Active                                                                                                                                         | 97/51%                                                                                                  | B                                                                                              | \$79,611                                                                                           | 7%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Lakes Academy Middle School                       | 13-6033 | Active                                                                                                                                         | 531/68%                                                                                                 | B                                                                                              | \$717,067                                                                                          | 20%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Lakes Academy High School                         | 13-7018 | Active                                                                                                                                         | 597/67%                                                                                                 | B                                                                                              | \$1,688,559                                                                                        | 39%                                                                                                        | No                                                                                                                  |
| Dade      | Mater Academy (Miami Beach)                             | 13-5047 | Active                                                                                                                                         | 267/67%                                                                                                 | B                                                                                              | \$37,192                                                                                           | 2%                                                                                                         | No                                                                                                                  |
| Dade      | Mater Academy High School (Miami Beach)                 | 13-7025 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Mater Grove Academy                                     | 13-5045 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Mater Brickell Preparatory School                       | 13-5046 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Mater Academy at Mt. Sinai                              | 13-5054 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | iMater Academy                                          | 13-5384 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | iMater Academy Middle School                            | 13-6014 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | iMater Preparatory Academy High School                  | 13-7090 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Mater Academy Virtual Middle School                     | 13-6997 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Sports Leadership and Management Charter Middle School  | 13-6015 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Sports Leadership and Management Charter High School    | 13-7016 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Ben Gamla Charter School                                | 13-5022 | Active                                                                                                                                         | 79/46%                                                                                                  | N/A                                                                                            | \$4,199                                                                                            | 1%                                                                                                         | No                                                                                                                  |
| Dade      | City of Hialeah Educational Academy                     | 13-7262 | Active                                                                                                                                         | 330/81%                                                                                                 | A                                                                                              | \$98,852                                                                                           | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Doral Academy                                           | 13-3030 | Active                                                                                                                                         | 771/35%                                                                                                 | A                                                                                              | \$3,225,836                                                                                        | 50%                                                                                                        | No                                                                                                                  |
| Dade      | Just Arts and Management Middle School                  | 13-6083 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Doral Academy of Technology                             | 13-3029 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Doral Academy Charter Middle School                     | 13-6030 | Active                                                                                                                                         | 1,000/53%                                                                                               | A                                                                                              | \$1,860,517                                                                                        | 27%                                                                                                        | No                                                                                                                  |
| Dade      | Doral Academy Charter High School                       | 13-7020 | Active                                                                                                                                         | 973/57%                                                                                                 | A                                                                                              | \$17,717                                                                                           | 0%                                                                                                         | No                                                                                                                  |
| Dade      | Doral Performing Arts and Entertainment Academy         | 13-7009 | Active                                                                                                                                         | 91/63%                                                                                                  | A                                                                                              | \$494,020                                                                                          | 72%                                                                                                        | No                                                                                                                  |
| Dade      | Theodore R. and Thelma A. Gibson Charter School         | 13-2060 | Active                                                                                                                                         | 261/89%                                                                                                 | D                                                                                              | \$1,950                                                                                            | 0%                                                                                                         | No                                                                                                                  |
| Dade      | Integrated Science and Asian Culture Academy            | 13-2004 | Active                                                                                                                                         | 25/24%                                                                                                  | N/A                                                                                            | \$22,405                                                                                           | 8%                                                                                                         | No                                                                                                                  |
| Dade      | International Studies Charter Middle School             | 13-6045 | Active                                                                                                                                         | 187/74%                                                                                                 | A                                                                                              | \$75,335                                                                                           | 6%                                                                                                         | No                                                                                                                  |
| Dade      | International Studies Charter High School               | 13-7007 | Active                                                                                                                                         | 353/51%                                                                                                 | A                                                                                              | \$229,573                                                                                          | 9%                                                                                                         | No                                                                                                                  |
| Dade      | International Studies Virtual Academy                   | 13-6017 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Miami Children's Museum Charter School                  | 13-4000 | Active                                                                                                                                         | 244/49%                                                                                                 | N/A                                                                                            | \$1,339,478                                                                                        | 73%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy Charter School            | 13-0600 | Active                                                                                                                                         | 650/41%                                                                                                 | A                                                                                              | \$1,775,438                                                                                        | 34%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy Charter Middle School     | 13-6022 | Active                                                                                                                                         | 822/49%                                                                                                 | A                                                                                              | \$399,183                                                                                          | 7%                                                                                                         | No                                                                                                                  |
| Dade      | Pinecrest Preparatory Academy High School               | 13-7053 | Active                                                                                                                                         | 163/50%                                                                                                 | B                                                                                              | \$233,954                                                                                          | 21%                                                                                                        | No                                                                                                                  |
| Dade      | Pinecrest Academy South Campus                          | 13-0342 | Active                                                                                                                                         | 750/53%                                                                                                 | A                                                                                              | \$498,548                                                                                          | 8%                                                                                                         | No                                                                                                                  |
| Dade      | Pinecrest Palm Academy                                  | 13-4634 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Pinecrest Academy (North Campus)                        | 13-5048 | Active                                                                                                                                         | 340/67%                                                                                                 | A                                                                                              | \$100,889                                                                                          | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Pinecrest Academy Middle School (North Campus)          | 13-6003 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Pinecrest Cove Academy                                  | 13-5049 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Somerset Academy (Miami-Dade)                           | 13-0520 | Active                                                                                                                                         | 527/54%                                                                                                 | A                                                                                              | \$153,993                                                                                          | 4%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (Miami-Dade)             | 13-6004 | Active                                                                                                                                         | 174/46%                                                                                                 | A                                                                                              | \$291,211                                                                                          | 24%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy (Silver Palms)                         | 13-0332 | Active                                                                                                                                         | 948/80%                                                                                                 | N/A                                                                                            | \$496,376                                                                                          | 7%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy High School (Miami-Dade)               | 13-7042 | Active                                                                                                                                         | 286/81%                                                                                                 | A                                                                                              | \$692,019                                                                                          | 31%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Academy High School (South Campus)             | 13-7038 | Active                                                                                                                                         | 17/82%                                                                                                  | N/A                                                                                            | \$105,205                                                                                          | 56%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Preparatory Academy at Silver Palms            | 13-4012 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | \$496,376                                                                                          | 7%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset City Arts Academy                              | 13-2012 | Active                                                                                                                                         | 209/33%                                                                                                 | A                                                                                              | \$28,373                                                                                           | 2%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (Country Palms)          | 13-6043 | Active                                                                                                                                         | 10/10%                                                                                                  | N/A                                                                                            | \$29,985                                                                                           | 29%                                                                                                        | No                                                                                                                  |
| Dade      | Somerset Oaks Academy                                   | 13-3033 | Active                                                                                                                                         | N/A                                                                                                     | N/A                                                                                            | N/A                                                                                                | N/A                                                                                                        | N/A                                                                                                                 |
| Dade      | Somerset Academy Elementary School (South Miami Campus) | 13-2007 | Active                                                                                                                                         | 425/14%                                                                                                 | A                                                                                              | \$402,182                                                                                          | 9%                                                                                                         | No                                                                                                                  |
| Dade      | Somerset Academy Middle School (South Miami)            | 13-6053 | Active                                                                                                                                         | 73/8%                                                                                                   | A                                                                                              | \$47,509                                                                                           | 10%                                                                                                        | No                                                                                                                  |

# **Addendum C - Applicant Worksheet History Schools Previously Operated by Management Company**

**Form IEPC-M1A  
Rule 6A-6.0786  
August 2015**

| District   | School Name                                                          | MSID    | Status<br>(Active/Closed) | Enrollment /FRL% | School<br>Grade/School<br>Improvement<br>Rating | Year End Fund<br>Balance | Unassigned Fund<br>Balance as<br>Percentage of<br>Total Revenue | Audit Finding<br>(Yes/No) |
|------------|----------------------------------------------------------------------|---------|---------------------------|------------------|-------------------------------------------------|--------------------------|-----------------------------------------------------------------|---------------------------|
| Dade       | Somerset Academy Charter Elementary School (South Homestead)         | 13-0339 | Active                    | 292/67%          | A                                               | \$418,590                | 18%                                                             | No                        |
| Dade       | Somerset Academy Charter Middle School (South Homestead)             | 13-6013 | Active                    | 104/65%          | A                                               | \$168,647                | 23%                                                             | No                        |
| Dade       | Somerset Academy Charter High School (South Homestead)               | 13-7034 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Gables Academy                                              | 13-5008 | Active                    | 57/2%            | N/A                                             | \$23,497                 | 3%                                                              | No                        |
| Dade       | Somerset Academy Bay                                                 | 13-5062 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Bay Middle School                                   | 13-6128 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Virtual Middle High School                          | 13-6016 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Somerset Academy Middle School (Country Palms)                       | 06-5151 | Active                    | 795/27%          | A                                               | \$29,985                 | 29%                                                             | No                        |
| Broward    | Somerset Academy                                                     | 06-5141 | Active                    | 862/31%          | A                                               | \$1,394,864              | 17%                                                             | No                        |
| Broward    | Somerset Academy High School                                         | 06-5221 | Active                    | 703/36%          | A                                               | \$738,552                | 14%                                                             | No                        |
| Broward    | Somerset Arts Conservatory                                           | 06-5396 | Active                    | 76/36%           | A                                               | \$331,080                | 61%                                                             | No                        |
| Broward    | Somerset Academy (Miramar Campus)                                    | 06-5405 | Active                    | 695/55%          | A                                               | \$2,475,131              | 40%                                                             | No                        |
| Broward    | Somerset Academy Middle School (Miramar Campus)                      | 06-5406 | Active                    | 396/55%          | A                                               | \$595,337                | 20%                                                             | No                        |
| Broward    | Somerset Academy Miramar South                                       | 06-5054 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy (Davie)                                             | 06-5211 | Active                    | 142/42%          | A                                               | \$627,236                | 55%                                                             | No                        |
| Broward    | Somerset Academy East Preparatory                                    | 06-5391 | Active                    | 232/73%          | A                                               | \$391,536                | 19%                                                             | No                        |
| Broward    | Somerset Academy Hollywood                                           | 06-5387 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Hollywood Middle School                             | 06-5419 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Village                                             | 06-5004 | Active                    | 306/81%          | C                                               | \$339,736                | 12%                                                             | No                        |
| Broward    | Somerset Academy Village Charter Middle School                       | 06-5002 | Active                    | 92/87%           | C                                               | \$8,652                  | 1%                                                              | No                        |
| Broward    | Somerset Preparatory Academy Charter School at North Lauderdale      | 06-5003 | Active                    | 440/81%          | D                                               | \$203,298                | 6%                                                              | No                        |
| Broward    | Somerset Preparatory Academy Charter High School at North Lauderdale | 06-5006 | Active                    | 50/71%           | N/A                                             | \$8,466                  | 2%                                                              | No                        |
| Broward    | Somerset Academy Neighborhood School                                 | 06-5021 | Active                    | 78/13%           | N/A                                             | \$1,394,864              | 17%                                                             | No                        |
| Broward    | Somerset Preparatory Academy Charter Middle School                   | 06-5441 | Active                    | 73/79%           | A                                               | \$103,880                | 19%                                                             | No                        |
| Broward    | Somerset Academy Charter High School (Miramar Campus)                | 06-5007 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Pines Academy                                               | 06-5030 | Active                    | 270/63%          | C                                               | \$118,567                | 5%                                                              | No                        |
| Broward    | Somerset Academy Pompano                                             | 06-5388 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Somerset Academy Pompano Middle School                               | 06-5413 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Ben Gamla Charter School                                             | 06-5410 | Active                    | 566/47%          | A                                               | \$8,262                  | 0%                                                              | No                        |
| Broward    | Ben Gamla Charter School (North Campus)                              | 06-5001 | Active                    | 19/47%           | N/A                                             | \$13,714                 | 7%                                                              | No                        |
| Broward    | Ben Gamla South Broward                                              | 06-5392 | Active                    | 223/29%          | C                                               | \$5,258                  | 0%                                                              | No                        |
| Broward    | Ben Gamla Charter School (Hallandale Campus)                         | 06-5025 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Broward    | Ben Gamla Charter High School                                        | 06-5005 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Cornerstone Charter Academy                                          | 48-0133 | Active                    | 696/5%           | B                                               | \$232,832                | 4%                                                              | No                        |
| Orange     | Cornerstone Charter High School                                      | 48-0146 | Active                    | 162/11%          | N/A                                             | \$263,527                | 21%                                                             | No                        |
| Orange     | Pinecrest Preparatory Charter School (Orlando Campus)                | 48-0155 | Active                    | 60/57%           | N/A                                             | \$24,711                 | 3%                                                              | No                        |
| Orange     | Pinecrest Creek Academy                                              | 48-0203 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Duval      | Somerset Academy (Eagle Campus)                                      | 16-1251 | Active                    | 198/30%          | N/A                                             | \$92,538                 | 5%                                                              | No                        |
| Duval      | Somerset Academy Charter Middle School (Eagle Campus)                | 16-1261 | Active                    | 84/31%           | A                                               | \$83,172                 | 11%                                                             | No                        |
| Duval      | Somerset Academy High School (Eagle Campus)                          | 16-1381 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Duval      | Somerset Preparatory Academy                                         | 16-5501 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Ben Gamla Charter School Palm Beach                                  | 50-3941 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Boca                                                | 50-3413 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Boca Middle                                         | 50-4041 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Middle School                                       | 50-4012 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Palm Beach | Somerset Academy Canyons High School                                 | 50-4013 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| St. Lucie  | Somerset College Preparatory Academy                                 | 56-0712 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Monroe     | Key West Collegiate School                                           | 44-0382 | Active                    | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Dade       | Excelsior Language Academy of Hialeah                                | 13-5029 | Active                    | 623/92%          | B                                               | \$6,229                  | 3%                                                              | No                        |
| Dade       | Excelsior Academy High School                                        | 13-7054 | Closed*                   | 34/94%           | N/A                                             | \$6,229                  | 3%                                                              | No                        |
| Brevard    | Odyssey Charter School                                               | 05-6507 | Active                    | 565/52%          | B                                               | \$1,213,999              | 25%                                                             | No                        |
| Brevard    | Palm Bay Community Charter                                           | 05-6519 | Closed*                   | 739/77%          | C                                               | -\$3,593,918             | -61%                                                            | No                        |
| Brevard    | Palm Bay Municipal Charter High School                               | 05-6520 | Closed*                   | 44/77%           | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Orange     | Pinecrest Preparatory Charter High School (Orlando Campus)           | 48-0162 | Closed*                   | 7/0%             | N/A                                             | \$256                    | 1%                                                              | No                        |
| Pinellas   | Ben Gamla Charter School                                             | 52-7321 | Closed*                   | N/A              | N/A                                             | N/A                      | N/A                                                             | N/A                       |
| Monroe     | Key West Montessori Charter School                                   | 44-0351 | Active                    | --               | --                                              | --                       | --                                                              | --                        |

\*See supporting documentation  
-- School did not have service agreement with ESP



## Addendum C - Supporting Documentation

### THE NATIONAL BEN GAMLA CHARTER SCHOOL FOUNDATION, INC.

#### *BEN GAMLA CHARTER SCHOOL – PINELLAS*

Status as of date of application: Closed

Date Charter School Closed: June 30, 2013

Reason(s) for closure: Voluntary Closure by the Governing Board of the Charter School

#### Documentation Attached:

- Letter from Pinellas County Schools District accepting the National Ben Gamla Charter School Foundation, Inc.'s decision to voluntarily close "Ben Gamla Charter School – Pinellas"
- Agreement for Termination of Charter School between the National Ben Gamla Charter School Foundation, Inc., and The School Board of Pinellas County, Florida, acknowledging:
  - Ben Gamla's decision to terminate the charter school;
  - The District's acceptance of Ben Gamla's decision;
  - The mutual agreement to close the Charter School and cease school operations effective June 30, 2013.

## Addendum C - Supporting Documentation



ADMINISTRATION BUILDING  
301 Fourth St. SW  
P.O. Box 2942  
Largo, FL 33779-2942  
Ph (727) 588 6000

SCHOOL BOARD OF  
PINELLAS COUNTY, FLORIDA

Chairperson  
Carol J. Cook

Vice Chairperson  
Peggy L. O'Shea

Janet R. Clark  
Rene Flowers  
Terry Krassner  
Linda S. Leiner  
Robin L. Wixle

Superintendent  
Michael A. Grego, Ed D

Debra Klein, Board Chair  
National Ben Gamla Charter School Foundation  
6340 Sunset Drive  
Miami, Florida 33143

*By Certified U.S. Mail and e-mail*

June 18, 2013

Re: Ben Gamla Charter School Pinellas Voluntary Closure

Dear Ms. Klein:

This letter is to serve notice that Pinellas County School District (PCS) accepts the National Ben Gamla Charter School's decision to voluntarily close the Ben Gamla Charter School-Pinellas June 30, 2013. As the Sponsor to the charter school, PCS does not endorse the transfer of the charter to another entity and will move forward with the procedures for closing the school.

We ask that you sign the one page closing agreement, return a scanned version of the signed agreement to me by Friday, June 21, 2013 and mail the original. Please identify the name of the Ben Gamla representative who will work with us during closing procedures and who will be on site while student records and equipment are picked up.

Since you identified June 30, 2013 as the last date that you may have access to the building, we are sensitive to your urgency to complete these procedures by then and will work with you to meet this requirement.

Thank you.

Dot Clark  
Coordinator, Partnership Schools  
Pinellas County Schools

PCS School Board Members  
Dr. Michael A. Grego, Superintendent, Pinellas County Schools  
David Koperski, School Board Attorney  
Lori Matway, Associate Superintendent for School and Community Services  
Eric Lynn, Ben Gamla Charter-Pinellas, Local Chair

## Addendum C - Supporting Documentation

### AGREEMENT FOR TERMINATION OF CHARTER SCHOOL BEN GAMLA CHARTER SCHOOL - PINELLAS

This Agreement (hereinafter "Agreement"), is entered into this \_\_\_\_ day of \_\_\_\_\_, 2013, by and between the School District of Pinellas County, Florida (hereinafter "District"), and National Ben Gamla Charter School Foundation, Inc., d/b/a Ben Gamla Charter School - Pinellas (hereinafter "Ben Gamla").

#### WITNESSETH:

WHEREAS, Ben Gamla and the School Board of Pinellas County, Florida (hereinafter "School Board") entered into a Charter School Agreement dated May 8, 2012 (hereinafter "Charter"), that provides the terms of the School Board's sponsorship of Ben Gamla's charter school;

WHEREAS, Ben Gamla has sent written notice that it is closing the charter school effective June 30, 2013; and

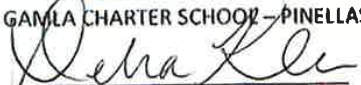
WHEREAS, the School District agrees to work with Ben Gamla on closing procedures as outlined in the Charter.

NOW, THEREFORE, in consideration of premises and of the mutual promises and covenants herein set forth, the receipt of which are hereby acknowledged by both parties, the parties agree as follows:

1. The recitals above are true and correct and are incorporated herein by reference.
2. The Charter shall terminate at 5:00 p.m. on June 30, 2013, except that the provisions of the contract relating to liability, property return, closing procedures, indemnification and other related provisions shall survive the termination of the contract.
3. Ben Gamla and the District, through their designated contacts, will coordinate the pre-closing and closing procedures to be completed in accordance with the Charter.

IN WITNESS WHEREOF, Ben Gamla and the District have executed or caused this Agreement to be executed by their undersigned officers, duly authorized, as of the day and year first above written.

BOARD OF DIRECTORS OF  
NATIONAL BEN GAMLA CHARTER  
SCHOOL FOUNDATION, INC., d/b/a  
BEN GAMLA CHARTER SCHOOL - PINELLAS

By:   
Debra Klein,  
Board Chair

THE SCHOOL BOARD OF PINELLAS  
COUNTY, FLORIDA

By: \_\_\_\_\_  
Michael A. Grego, Ed.D.  
Superintendent

Its: \_\_\_\_\_

Attest: \_\_\_\_\_

By its: \_\_\_\_\_

Approved as to Form:

\_\_\_\_\_  
Office of School Board Attorney

## **Addendum C - Supporting Documentation**

### **THE CITY OF PALM BAY, FLORIDA**

#### *PALM BAY COMMUNITY CHARTER SCHOOL – PATRIOT CAMPUS*

County: Brevard

Status as of date of application: Closed

Date Charter School Closed: July 19, 2011

#### **Reason(s) for closure:**

On June 30, 2011, the School Board of Brevard County, Florida, the Charter School's Sponsor, served the City of Palm Bay, Florida, the Charter School's Governing Board, with 90-day notice of termination for failure to meet generally accepted standards of fiscal management. There were genuine issues of material fact which may have been appealable as of right. However, anticipating a termination, on June 23, 2011, the Governing Body of the Charter School, (the City) voted unanimously to not contest or appeal the School Board's termination of the Charter School Contract. The City and the School Board agreed to close the Charter School and cease School operations as of July 19, 2011.

#### **Documentation Attached:**

- School Board of Brevard County, Florida, Meeting of July 19, 2011; Board Agenda Item No. F-33; "Final Order on the School Board's ninety (90) day notice of termination of the Palm Bay Community Charter School – Patriot Campus", agreed termination of charter school.
- Letter dated June 30, 2011 from the School Board of Brevard County, Florida to the City of Palm Bay giving 90-days' notice of termination for failure to meet generally accepted standards of fiscal management
- Fax from the City of Palm Bay to the School Board of Brevard County, Florida and attached Minutes of City of Palm Bay, Florida Council Meeting No. 2011-21 of June 23, 2011, notifying the School Board that the City will not contest or appeal the School Board's termination of the Charter School Contract.

## Addendum C - Supporting Documentation

BEFORE THE SCHOOL BOARD OF BREVARD COUNTY, FLORIDA

IN RE: PALM BAY COMMUNITY  
CHARTER SCHOOL - PATRIOT CAMPUS

BOARD AGENDA ITEM NO. F-33  
July 19, 2011

### FINAL ORDER

THIS CAUSE came before the SCHOOL BOARD OF BREVARD COUNTY, FLORIDA (SCHOOL BOARD) on the School Board's ninety (90) day notice of termination of the Palm Bay Community Charter School - Patriot Campus charter school contract dated June 30, 2005.

### FINDINGS OF FACT

1. The School Board and the City of Palm Bay, Florida, entered into the Palm Bay Community Charter School - Patriot Campus charter school contract on June 30, 2005, pursuant to the authority of Section 1002.33, Fla. Stat., to grant the municipality a charter contract to operate a charter school in the City of Palm Bay.

2. At its June 30, 2011, meeting the School Board took action to provide the City of Palm Bay (City), the governing body of the charter school, a ninety (90) day notice of termination of the charter school contract pursuant to Section 1002.33(8)(b), Fla. Stat., for failure to meet generally accepted standards of fiscal management. A copy of said notice is attached hereto and incorporated herein as Exhibit "A".

3. On July 14, 2011, the City's Attorney delivered a letter to the School Board Attorney containing a certified copy of the minutes of the June 23, 2011, Palm Bay City Council special

## **Addendum C - Supporting Documentation**

meeting, at which the City Council, as governing body of the charter school, voted unanimously to not contest or appeal the School Board's termination of the charter school contract. A copy of the City Attorney's letter and certified minutes of the Palm Bay City Council's June 23, 2011, special meeting are attached hereto as Exhibit "B".

4. It is in the best interest of the students enrolled in the charter school that the charter contract be terminated as of the date of this Final Order to allow parents the opportunity to enroll their children in other public schools before the beginning of the 2011-2012 school year on August 10, 2011.

5. It is also in the best interest of the students attending the receiving schools and the administration of the Brevard County School District to terminate the charter contract as of the date of this Final Order to facilitate the orderly transfer of students into the receiving schools pursuant to Section 1002.33(8)(g), Fla. Stat.

6. Based upon the action of the Palm Bay City Council as governing body of the charter school to not contest or appeal the termination of the charter contract, and in reliance thereon; the School Board finds that the charter contract can and should be terminated effective as of the date of this Final Order.

### **CONCLUSIONS OF LAW**

7. The School Board has jurisdiction of the subject matter and parties of this proceeding. Section 1002.33(8), Fla. Stat.

## Addendum C - Supporting Documentation

8. The School Board finds that the charter school contract between the School Board and the City of Palm Bay for the Palm Bay Community Charter School - Patriot Campus, should be and is hereby terminated effective July 19, 2011, for the failure of the charter school to meet generally accepted standards of fiscal management pursuant to Sections 1002.33(8)(a) and (b), Fla. Stat.

DONE AND ORDERED this 19th day of July, 2011, in Viera, Brevard County, Florida.

THE SCHOOL BOARD OF  
BREVARD COUNTY, FLORIDA

By:   
BARBARA A. MURRAY, Ph.D.  
Chairman

Filed with the Clerk in the  
Office of the Superintendent  
this 19th day of July, 2011.

ATTEST:

  
BRIAN T. BINGGELI, Ed.D  
Superintendent

## Addendum C - Supporting Documentation

### School Board of Brevard County

2700 Judge Fran Jamieson Way • Viera, FL 32940-6601  
Brian T. Binggeli, Ed.D., Superintendent



#### VIA U.S. CERTIFIED MAIL AND FAX

June 30, 2011

The Honorable John Mazziotti  
Mayor of Palm Bay  
City Hall  
120 Malabar Road, S.E.  
Palm Bay, FL 32907

Ms. Sue Hann  
Palm Bay City Manager  
City Hall  
120 Malabar Road, S.E.  
Palm Bay, FL 32907

Dear Mayor Mazziotti and Ms. Hann:

The purpose of this correspondence is to provide official notification that the School Board of Brevard County took action at the June 30, 2011 Special Board meeting to give ninety (90) day notice to terminate the Palm Bay Community Charter – Patriot Campus charter contract. Pursuant to §1002.33(8)(a), Florida Statutes, the charter contract may be terminated for failure to meet generally accepted standards of fiscal management. Palm Bay Community Charter – Patriot Campus has failed to correct identified deficiencies as described in Internal Audit Report dated June 1, 2011 and External Audits for June 30, 2009 and 2010 fiscal years.

As you are aware, RSM McGladrey was contracted by Brevard Public Schools to perform a financial audit at Palm Bay Community Charter – Patriot Campus. Major issues regarding the fiscal management of Palm Bay Community Charter – Patriot Campus are cited in the June 1, 2011 report provided by RSM McGladrey. The internal auditor determines risks based upon auditing standards. Of the thirteen (13) identified concerns, eight (8) are considered “High” risks that require immediate attention and could cause significant operational issues if not addressed.

Exhibit

"A"

Phone: (321) 633-1000, ext. 402 • FAX: (321) 633-3432

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## Addendum C - Supporting Documentation

As reported by the external auditor, Berman Hopkins, Patriot has met one of the conditions for “financial emergency” for two (2) consecutive years as described in §218.503(1):

- §218.503(1)(a) – Failure to make bond debt service payments when due, as a result of lack of funds.
- §218.503(1)(e) – A total fund balance deficit and a government-wide ending net deficit.

Patriot reported an accumulated net deficit of \$4,569,700 and a government-wide ending net deficit of \$3,300,100 as of June 30, 2010. The accumulated net deficit increased \$1,119,700 from June 30, 2009 to June 30, 2010. Moreover, the school received a going-concern qualified opinion for the year ended June 30, 2010 and a disclaimer of opinion for the year ended June 30, 2009 from the external auditor.

As reported in Patriot’s external audit report dated August 31, 2010, Patriot entered into a capital lease for financing the acquisition of the school facility in 2006, in the amount of \$21,000,000 with payments through July 1, 2036. The lease arrangement was entered into as part of a transaction consisting of a bond issuance by the City of Palm Bay. Prior to December 31, 2008, Patriot made interest payments in the amount of \$589,800. However, Patriot has been unable to continue making capital lease payments due to insufficient funds subsequent to this date. Non-payment of the capital lease of January 1, 2009 resulted in a default of the agreement.

Pursuant to §1002.345, F.S., Palm Bay Community Charter – Patriot Campus provided the Office of School Choice a Financial Corrective Action Plan, dated March 8, 2010, which included a proposed Forbearance and Modification Agreement between the City of Palm Bay, as Issuer of the bonds, Palm Bay Community Charter L.L.C., as Borrower, and the bond Trustee and bond holders. Subsequently, the district provided the Florida Department of Education a synopsis of its concerns as well as a copy of the provided Financial Corrective Action Plan for approval on March 24, 2010. The intention of such forbearance would allow the Borrower and the City to enter into a financial recovery plan in accordance with §218.503, F.S., and provide financial stability for future operation as a charter school in accordance with §1013.62(a)(2), F.S.

As of this date, neither the City of Palm Bay nor Palm Bay Community Charter, L.L.C. has executed the Forbearance and Modification Agreement. Based on the analysis conducted by RSM McGladrey, it can be reasonably projected that Palm Bay Community Charter – Patriot Campus will continue to meet conditions of “financial emergency” as of June 30, 2011. In accordance with an email dated May 23, 2011 from Michael Kooi, Florida Department of Education Executive Director of the Office of Independent Education and Parental Choice, the Financial Corrective Action Plan cannot be approved by the Commissioner of Education without the execution of a Forbearance and Modification Agreement to address the accumulated net deficit.

## Addendum C - Supporting Documentation

Please understand that you may within fourteen (14) days of receipt of this notice, request an informal hearing before the Sponsor.

Sincerely,

A handwritten signature in black ink, appearing to read "BT Binggeli", written in a cursive style.

Brian T. Binggeli, Ed.D.

cc School Board Members  
Harold Bistline  
Judy Preston  
Jo Ann Clark  
Vicki Mace  
Karen Strickland  
RSM McGladrey  
Audit Committee Members  
Reggie Revis  
Andrew Lannon  
Florida Department of Education

## Addendum C - Supporting Documentation



Office of the City Attorney

VIA FAX

Brevard County School Board  
c/o Harold Turner Bistline, Esq.  
1037 Pathfinder Way  
Suite 150  
Rockledge, FL 32955-3268  
Fax No. 321.636.1170

**Re: Palm Bay Community Charter – Patriot Campus charter contract.  
Palm Bay Municipal Charter High School charter contract.**

Dear Mr. Bistline:

This letter is sent to you for the purpose of notifying you of the following facts. On June 21, 2011, I was verbally informed by you that Notice of Termination letters were forthcoming for both the Palm Bay Community Charter – Patriot Campus charter contract and the Palm Bay Municipal Charter High School charter contract. At Special Council Meeting No. 2011-21 on June 23, 2011, I notified the Mayor and City Council of this fact. The charter schools were the subject of agenda item no. 2 of that Special Council Meeting. During that Special Council Meeting, as you can see from attached Exhibit "1", the Mayor and City Council by a unanimous vote decided not to contest or appeal the School Board of Brevard County's forthcoming Notices of Termination of both the Palm Bay Community Charter – Patriot Campus charter contract and the Palm Bay Municipal Charter High School charter contract. As you can see from attached Exhibit "2", the Mayor, the City Manager and I received both Notice of Termination letters on June 30, 2011. These letters were subsequently forwarded by the City Manager to the Mayor and City Council on June 30, 2011 at 3:02 p.m.

Please call me if you have any questions or concerns.

Thanks,

Andrew P. Lannon, Esq.

Exhibit  
"B"

**Addendum C - Supporting Documentation****CITY OF PALM BAY, FLORIDA****SPECIAL COUNCIL MEETING NO. 2011-21**

Held on Thursday, the 23<sup>rd</sup> day of June 2011, at the City Hall Council Chambers, 120 Malabar Road, SE, Palm Bay, Florida.

This meeting was properly noticed pursuant to law; the minutes are on file in the Office of the City Clerk, City Hall, Palm Bay, Florida.

The meeting was called to order at the hour of 6:30 P.M.

**ROLL CALL:**

|                           |                   |         |
|---------------------------|-------------------|---------|
| <b>MAYOR:</b>             | John J. Mazziotti | Present |
| <b>DEPUTY MAYOR:</b>      | William Capote    | Present |
| <b>COUNCILMEMBER:</b>     | Kristine Isnardi  | Present |
| <b>COUNCILMEMBER:</b>     | Michele Paccione  | Present |
| <b>COUNCILMEMBER:</b>     | Ken Greene        | Present |
| <b>CITY MANAGER:</b>      | Sue Hann          | Present |
| <b>CITY ATTORNEY:</b>     | Andrew Lannon     | Present |
| <b>DEPUTY CITY CLERK:</b> | Terese Jones      | Present |

**CITY STAFF:** Present were Chad Shoultz, Deputy City Manager; and Brad Johnson, Budget Administrator.

**BUSINESS:**

1. **Attorney-client session scheduled to discuss the pending litigation of City of Palm Bay versus Wells Fargo Bank NA to provide the City Attorney advice concerning settlement negotiations or strategy related to litigation expenses.**

The Mayor announced the names of the individuals who would be in attendance at the meeting. He stated the meeting would last approximately one-half hour.

The City Council moved to the City Manager's Conference Room to hold the attorney-client session and returned to the Council Chambers at the conclusion of same.

2. **Consideration of action items regarding the Palm Bay Community Charter Schools.**

Mrs. Hann stated the charter school had been unable to make its debt service payment since January 1, 2009, as indicated in the Brevard County School Board internal audit report dated June 1, 2011. This placed the school in a continued state of financial emergency as defined in Florida Statutes, Section 218.503. The projected state funding was anticipated to decline from \$6,468 per student to \$6,045 per student. The enrollment had decreased from 736 in the past school year to 713 in Fiscal Year 2011-2012.



**Addendum C - Supporting Documentation**

City of Palm Bay, Florida  
Special Council Meeting No. 2011-21  
Minutes - June 23, 2011  
Page 2 of 2

Mr. Lannon stated the City had been advised by the School District that a Notice of Termination letter was forthcoming for the charter school. He asked for guidance as to whether the City would contest or appeal the termination.

Mrs. Hann stated that special counsel would be required for several different aspects of the appeal which would be very costly. Ultimately the City would become much more involved in the operation of the school; the City did not have the capacity to do so based on the budget constraints.

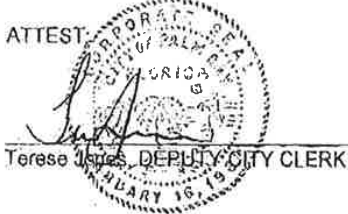
Motion by Mayor Mazziotti, seconded by Deputy Mayor Capote, not to contest or appeal the Notice of Termination. Motion carried with members voting as follows: Mayor Mazziotti, Yea; Deputy Mayor Capote, Yea; Councilwoman Isnardi, Yea; Councilwoman Paccione, Yea; Councilman Greene, Yea.

**ADJOURNMENT:**

There being no further business, the meeting adjourned at the hour of 7:14 P.M.

  
John J. Mazziotti, MAYOR

ATTEST

  
Teresa Lopez, DEPUTY CITY CLERK

## **Addendum C - Supporting Documentation**

### **THE CITY OF PALM BAY, FLORIDA**

#### ***PALM BAY MUNICIPAL CHARTER HIGH SCHOOL***

County: Brevard

Status as of date of application: Closed

Date Charter School Closed: July 19, 2011

#### **Reason(s) for closure:**

On June 30, 2011, the School Board of Brevard County, Florida, the Charter School's Sponsor, served the City of Palm Bay, Florida, the Charter School's Governing Board, with 90-day notice of termination for failure to meet generally accepted standards of fiscal management. There were genuine issues of material fact which may have been appealable as of right. However, anticipating a termination, on June 23, 2011, the Governing Body of the Charter School, (the City) voted unanimously to not contest or appeal the School Board's termination of the Charter School Contract. The City and the School Board agreed to close the Charter School and cease School operations as of July 19, 2011.

#### **Documentation Attached:**

- School Board of Brevard County, Florida, Meeting of July 19, 2011; Board Agenda Item No. F-32; "Final Order on the School Board's ninety (90) day notice of termination of the Palm Bay Municipal Charter High School", agreed termination of charter school.
- Letter dated June 30, 2011 from the School Board of Brevard County, Florida to the City of Palm Bay giving 90-days' notice of termination for failure to meet generally accepted standards of fiscal management
- Fax from the City of Palm Bay to the School Board of Brevard County, Florida and attached Minutes of City of Palm Bay, Florida Council Meeting No. 2011-21 of June 23, 2011, notifying the School Board that the City will not contest or appeal the School Board's termination of the Charter School Contract.

## Addendum C - Supporting Documentation

BEFORE THE SCHOOL BOARD OF BREVARD COUNTY, FLORIDA

IN RE: PALM BAY MUNICIPAL  
CHARTER HIGH SCHOOL

BOARD AGENDA ITEM NO. F-32  
July 19, 2011

### FINAL ORDER

THIS CAUSE came before the SCHOOL BOARD OF BREVARD COUNTY, FLORIDA (SCHOOL BOARD) on the School Board's ninety (90) day notice of termination of the Palm Bay Municipal Charter High School charter school contract dated May 12, 2009.

### FINDINGS OF FACT

1. The School Board and the City of Palm Bay, Florida, entered into the Palm Bay Municipal Charter High School charter school contract on May 12, 2009, pursuant to the authority of Section 1002.33, Fla. Stat., to grant the municipality a charter contract to operate a charter school in the City of Palm Bay.

2. At its June 30, 2011, meeting the School Board took action to provide the City of Palm Bay (City), the governing body of the charter school, a ninety (90) day notice of termination of the charter school contract pursuant to Section 1002.33(8)(b), Fla. Stat., for failure to meet generally accepted standards of fiscal management. A copy of said notice is attached hereto and incorporated herein as Exhibit "A".

3. On July 14, 2011, the City's Attorney delivered a letter to the School Board Attorney containing a certified copy of the minutes of the June 23, 2011, Palm Bay City Council special

## Addendum C - Supporting Documentation

meeting, at which the City Council, as governing body of the charter school, voted unanimously to not contest or appeal the School Board's termination of the charter school contract. A copy of the City Attorney's letter and certified minutes of the Palm Bay City Council's June 23, 2011, special meeting are attached hereto as Exhibit "B".

4. It is in the best interest of the students enrolled in the charter school that the charter contract be terminated as of the date of this Final Order to allow parents the opportunity to enroll their children in other public schools before the beginning of the 2011-2012 school year on August 10, 2011.

5. It is also in the best interest of the students attending the receiving schools and the administration of the Brevard County School District to terminate the charter contract as of the date of this Final Order to facilitate the orderly transfer of students into the receiving schools pursuant to Section 1002.33(8)(g), Fla. Stat.

6. Based upon the action of the Palm Bay City Council as governing body of the charter school to not contest or appeal the termination of the charter contract, and in reliance thereon, the School Board finds that the charter contract can and should be terminated effective as of the date of this Final Order.

### CONCLUSIONS OF LAW

7. The School Board has jurisdiction of the subject matter and parties of this proceeding. Section 1002.33(8), Fla. Stat.



## Addendum C - Supporting Documentation

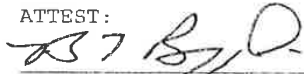
8. The School Board finds that the charter school contract between the School Board and the City of Palm Bay for the Palm Bay Municipal High School should be and is hereby terminated effective July 19, 2011, for the failure of the charter school to meet generally accepted standards of fiscal management pursuant to Sections 1002.33(8)(a) and (b), Fla. Stat.

DONE AND ORDERED this 19th day of July, 2011, in Viera, Brevard County, Florida.

THE SCHOOL BOARD OF  
BREVARD COUNTY, FLORIDA

By:   
BARBARA A. MURRAY, Ph.D.  
Chairman

Filed with the Clerk in the  
Office of the Superintendent  
this 19th day of July, 2011.

ATTEST:  
  
BRIAN T. BINGGELI, Ed.D  
Superintendent

## Addendum C - Supporting Documentation

### School Board of Brevard County

2700 Judge Frank Jamieson Way • Viera, FL 32940-6601

Brian T. Binggeli, Ed.D., Superintendent



VIA U.S. CERTIFIED MAIL AND FAX

June 30, 2011

The Honorable John Mazziotti  
Mayor of Palm Bay  
City Hall  
120 Malabar Road, S.E.  
Palm Bay, FL 32907

Ms. Sue Hann  
Palm Bay City Manager  
City Hall  
120 Malabar Road, S.E.  
Palm Bay, FL 32907

Dear Mayor Mazziotti and Ms. Hann:

The purpose of this correspondence is to provide official notification that the School Board of Brevard County took action at the June 30, 2011 Special Board meeting to give ninety (90) day notice to terminate the Palm Bay Municipal Charter High School charter contract. Pursuant to §1002.33(8)(a), Florida Statutes, the charter contract may be terminated for failure to meet generally accepted standards of fiscal management.

As you are aware, RSM McGladrey was contracted by Brevard Public Schools to perform a financial audit at Palm Bay Municipal Charter High School. Major issues regarding the fiscal management of Palm Bay Municipal Charter High School are cited in the June 1, 2011 report provided by RSM McGladrey. The internal auditor determines risks based upon auditing standards. Of the seven (7) identified concerns, three (3) are considered "High" risks that require immediate attention and could cause significant operational issues if not addressed.

RSM McGladrey reviewed the School's draft amended 2010/2011 annual budget, which was submitted to the internal auditor on May 25, 2011. (The amended budget was approved by the Palm Bay City Council on June 2, 2011.) The draft amended budget reflected revenue and expense amounts per the March 31, 2011 financial statements, expected future revenues and expenditures, which were not reflected in the original budget, and revised classification of certain expenses.

**Exhibit**

Phone: (321

"A"

21) 633-3432

An Equal Opportunity Employer • A Drug-Free Workplace

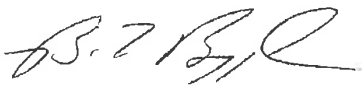
## Addendum C - Supporting Documentation

Palm Bay Municipal Charter High School has projected an \$11,900 excess of revenues over expenditures. The School has incurred \$89,800 of operation of plant expenditures as compared to a budget of \$7,000. As such, Palm Bay Municipal Charter High School is trending a potential \$70,900 deficiency of revenues under expenditures for the 2010/2011 fiscal year. The amended budget takes into account an action taken by the Palm Bay City Council on June 2, 2011, which modified the amount paid by the School for the use of the school facility.

The School Board of Brevard County is taking action to give ninety (90) day notice to terminate the Palm Bay Community Charter – Patriot Campus charter contract. Palm Bay Municipal Charter High School shares the same facility, administration, and other resources with the City's K-8 charter school, Palm Bay Community Charter – Patriot Campus, which meets criteria for a state of "financial emergency". It stands to reason that the high school will not be able to sustain operation under these circumstances, particularly since the School is not projected to end the current fiscal year with a positive fund balance.

Please understand that you may within fourteen (14) days of receipt of this notice, request an informal hearing before the Sponsor.

Sincerely,



Brian T. Binggeli, Ed.D.

cc    School Board Members  
      Harold Bistline  
      Judy Preston  
      Jo Ann Clark  
      Vicki Mace  
      Karen Strickland  
      RSM McGladrey  
      Audit Committee Members  
      Reggie Revis  
      Andrew Lannon  
      Florida Department of Education

**Addendum C - Supporting Documentation****Office of the City Attorney****VIA FAX**

Brevard County School Board  
c/o Harold Turner Bistline, Esq.  
1037 Pathfinder Way  
Suite 150  
Rockledge, FL 32955-3268  
Fax No. 321.636.1170

**Re: Palm Bay Community Charter – Patriot Campus charter contract.  
Palm Bay Municipal Charter High School charter contract.**

Dear Mr. Bistline:

This letter is sent to you for the purpose of notifying you of the following facts. On June 21, 2011, I was verbally informed by you that Notice of Termination letters were forthcoming for both the Palm Bay Community Charter – Patriot Campus charter contract and the Palm Bay Municipal Charter High School charter contract. At Special Council Meeting No. 2011-21 on June 23, 2011, I notified the Mayor and City Council of this fact. The charter schools were the subject of agenda item no. 2 of that Special Council Meeting. During that Special Council Meeting, as you can see from attached Exhibit "1", the Mayor and City Council by a unanimous vote decided not to contest or appeal the School Board of Brevard County's forthcoming Notices of Termination of both the Palm Bay Community Charter – Patriot Campus charter contract and the Palm Bay Municipal Charter High School charter contract. As you can see from attached Exhibit "2", the Mayor, the City Manager and I received both Notice of Termination letters on June 30, 2011. These letters were subsequently forwarded by the City Manager to the Mayor and City Council on June 30, 2011 at 3:02 p.m.

Please call me if you have any questions or concerns.

Thanks,

*Andrew P. Lannon*  
Andrew P. Lannon, Esq.

**Exhibit**

**"B"**

## Addendum C - Supporting Documentation

### CITY OF PALM BAY, FLORIDA

#### SPECIAL COUNCIL MEETING NO. 2011-21

Held on Thursday, the 23<sup>rd</sup> day of June 2011, at the City Hall Council Chambers, 120 Malabar Road, SE, Palm Bay, Florida.

This meeting was properly noticed pursuant to law; the minutes are on file in the Office of the City Clerk, City Hall, Palm Bay, Florida.

The meeting was called to order at the hour of 6:30 P.M.

#### ROLL CALL:

|                    |                   |         |
|--------------------|-------------------|---------|
| MAYOR:             | John J. Mazziotti | Present |
| DEPUTY MAYOR:      | William Capote    | Present |
| COUNCILMEMBER:     | Kristine Isnardi  | Present |
| COUNCILMEMBER:     | Michele Paccione  | Present |
| COUNCILMEMBER:     | Ken Greene        | Present |
| CITY MANAGER:      | Sue Hann          | Present |
| CITY ATTORNEY:     | Andrew Larnon     | Present |
| DEPUTY CITY CLERK: | Terese Jones      | Present |

CITY STAFF: Present were Chad Shoultz, Deputy City Manager; and Brad Johnson, Budget Administrator.

#### BUSINESS:

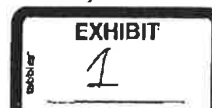
1. Attorney-client session scheduled to discuss the pending litigation of *City of Palm Bay versus Wells Fargo Bank NA* to provide the City Attorney advice concerning settlement negotiations or strategy related to litigation expenses.

The Mayor announced the names of the individuals who would be in attendance at the meeting. He stated the meeting would last approximately one-half hour.

The City Council moved to the City Manager's Conference Room to hold the attorney-client session and returned to the Council Chambers at the conclusion of same.

2. Consideration of action items regarding the Palm Bay Community Charter Schools.

Mrs. Hann stated the charter school had been unable to make its debt service payment since January 1, 2009, as indicated in the Brevard County School Board internal audit report dated June 1, 2011. This placed the school in a continued state of financial emergency as defined in Florida Statutes, Section 218.503. The projected state funding was anticipated to decline from \$6,468 per student to \$6,045 per student. The enrollment had decreased from 736 in the past school year to 713 in Fiscal Year 2011-2012.



## Addendum C - Supporting Documentation

City of Palm Bay, Florida  
Special Council Meeting No. 2011-21  
Minutes - June 23, 2011  
Page 2 of 2

Mr. Lannon stated the City had been advised by the School District that a Notice of Termination letter was forthcoming for the charter school. He asked for guidance as to whether the City would contest or appeal the termination.

Mrs. Hann stated that special counsel would be required for several different aspects of the appeal which would be very costly. Ultimately the City would become much more involved in the operation of the school; the City did not have the capacity to do so based on the budget constraints.

Motion by Mayor Mazziotti, seconded by Deputy Mayor Capote, not to contest or appeal the Notice of Termination. Motion carried with members voting as follows: Mayor Mazziotti, Yea; Deputy Mayor Capote, Yea; Councilwoman Isnardi, Yea; Councilwoman Paccione, Yea; Councilman Greene, Yea.

### ADJOURNMENT:

There being no further business, the meeting adjourned at the hour of 7:14 P.M.

  
John J. Mazziotti, MAYOR

ATTEST:

  
Teresa Jones, DEPUTY CITY CLERK

## Addendum C - Supporting Documentation

### PINECREST ACADEMY, INC.

#### *PINECREST ACADEMY HIGH SCHOOL (ORLANDO CAMPUS)*

Status as of date of application: Closed

Date Charter School Closed: Effective upon approval for 2012-13 school year

November 2, 2012 (Approved by Pinecrest Academy, Inc. Governing Board)

December 11, 2012 (Approved by Orange County School Board)

Reason(s) for closure: Voluntary Closure by the Governing Board of the Charter School

#### Documentation Attached:

- Pinecrest Academy, Inc. Resolution approving the Governing Board's intent to dissolve or voluntarily close Pinecrest Academy High School (Orlando Campus) effective November 2, 2012
- Orange County School Board Meeting of December 11, 2012, Item 7.02 "Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School (Orlando Campus)"
  - Action Type: Consent.
  - Recommended Action: Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School.
  - Final Resolution: Motion Carries.

## Addendum C - Supporting Documentation

PINECREST ACADEMY, INC

### BOARD RESOLUTION

The undersigned hereby certifies that he/she is an Officer and/or Director of **PINECREST ACADEMY, INC.**, a not-for-profit corporation organized and existing under the laws of the State of Florida, and that the following is a true and correct copy of a resolution adopted by the Board of Directors of said corporation at a meeting held on November 2, 2012:

**RESOLVED** by the Board of Directors of Pinecrest Academy, Inc. to approve to notify the school district of Pinecrest Academy, Inc.'s intent to dissolve or voluntarily close the Pinecrest Academy High School (Orlando Campus) effective immediately.

That the Adoption of said resolutions was in all respects legal and that said resolutions are in full force and effect and have not been modified or rescinded.

DATED November 2, 2012

PINECREST ACADEMY, INC.  
A Florida not-for-profit corporation

By:

  
Judith Marty, Board Chair



**Addendum C - Supporting Documentation**

**ORANGE COUNTY PUBLIC SCHOOLS**  
**445 West Amelia Street, Orlando, FL 32801**  
**407-317-3200**  
**OCPS Means Success!**

**Agenda Item Details**


---

|                    |                                                                                             |
|--------------------|---------------------------------------------------------------------------------------------|
| Meeting            | Dec 11, 2012 - Public Hearing and School Board Meeting 5:30 pm                              |
| Category           | 7. Consent - Approve Education Services Related Items                                       |
| Subject            | 7.02 Request Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School |
| Type               | Action (Consent)                                                                            |
| Recommended Action | Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School              |

**BACKGROUND:**

The application for Pinecrest Preparatory Charter High School (9-12) was accepted and unanimously approved by the Orange County School Board (OCSB) on September 23, 2008. Pinecrest Preparatory Charter High School exercised a contractual one-year deferral option for the 2009-2010 school year. In 2010-2011, Pinecrest Preparatory Charter High School began its operations. On September of 2012, the OCPS School Choice Office was informed and received documentation that Pinecrest Preparatory Charter High School had a student enrollment of only five (5) students. On October 30, 2012, Pinecrest Preparatory Charter High School and its Board of Directors informed OCPS of the student enrollment declining to zero (0) and a pending decision to voluntarily close the school. Pinecrest Preparatory Charter High School was then served with communication that failure to voluntarily close would lead to 90 day closure proceedings. Subsequently, Pinecrest Preparatory Charter High School and its Board of Directors voted on November 2, 2012 to voluntarily cease all operations as a charter school. This closure will be effective immediately for the 2012-13 school year and all subsequent school years. The Pinecrest Preparatory Charter High School Board of Directors cited the following reasons for the voluntary closure: an inability to secure an appropriate facility for operation and an unstable financial outlook based on student enrollment.

This charter school voluntary closure directly supports School Board Strategic Goal #1—Intense Focus on Student Achievement and Goal #4 – Efficient Operations.

**FISCAL IMPACT STATEMENT:**

None

**RECOMMENDED RESOLUTION:**

Approval of the Voluntary Closure of Pinecrest Preparatory Charter High School

**SUBMITTED AND PREPARED BY:**

Jesus Jara, Deputy Superintendent  
 Christopher Bernier, Senior Executive Director, School Choice Services

*Our adopted rules of Parliamentary Procedure, Robert's Rules, provide for an agenda listing several items for approval of the Board by a single motion. Items listed on the agenda have gone through Cabinet review and recommendation. Documentation concerning these items has been provided to all Board members and the public in advance to assure an extensive and thorough review. Items may be removed from the agenda at the request*

of any board agenda item

## **Attachment C - Supporting Documentation**

### **Motion & Voting**

---

to Approve the Consent Agenda

Motion by Christine Moore, second by Pam Gould.

Final Resolution: Motion Carries

Yea: William Sublette, Christine Moore, Joie W Cadle, Daryl Flynn, Kat B Gordon, Pam Gould, Judge Rick Roach, Nancy Robinson

### **OCPS EEO Non-Discrimination Statement**

**The School Board of Orange County, Florida, does not discriminate in admission or access to, or treatment or employment in its programs and activities, on the basis of race, color, religion, age, sex, national origin, marital status, disability, genetic information, sexual orientation, gender identity or expression, or any other reason prohibited by law. The following individuals at the Ronald Blocker Educational Leadership Center, 445 W. Amelia Street, Orlando, Florida 32801, attend to compliance matters: ADA Coordinator & Equal Employment Opportunity (EEO) Supervisor: Carianne Reggio; Section 504 Coordinator: Latonia Green; Acting Title IX Coordinator: Jennifer Gramzinski (407.317.3200)**



*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

# ***APPENDIX A BUDGET***

**For:  
SOMERSET PARKS  
ACADEMY  
CHARTER SCHOOL**

## Start-up Budget

### ***Somerset Parks Academy Charter School***

#### **Start-up Budget**

|                                   | February | March  | April  | May   | June  | Total  |
|-----------------------------------|----------|--------|--------|-------|-------|--------|
| <b>Line of Credit / Grant **</b>  | 25,000   |        |        |       |       |        |
| <b>EXPENSES:</b>                  |          |        |        |       |       |        |
| <b>Administration Staff</b>       | 2,500    | 3,500  | 3,500  | 3,500 | 3,500 | 16,500 |
| <b>Marketing &amp; Enrollment</b> |          | 2,500  |        | 2,000 | 500   | 5,000  |
| <b>Computer/Printer</b>           | 1,500    |        |        |       | 1,000 | 2,500  |
| <b>Administrative Expenses</b>    | 500      | 200    | 100    | 100   | 100   | 1,000  |
| <b>TOTAL OPERATING EXPENSES</b>   | 4,500    | 6,200  | 3,600  | 5,600 | 5,100 | 25,000 |
| <b>Fund Balance</b>               | 20,500   | 14,300 | 10,700 | 5,100 | -     |        |

\*\* The School will apply for a \$25,000 planning and design grant, as provided by the Charter School Implementation Grant Program. If awarded, the grant will assist the school with the start-up costs which will be incurred prior to the period when the school will begin to receive operational funding from the sponsor. In the event that the start-up grant is not awarded, the school can either use resources from its network or has identified a non-profit charter school lender that will provide a line of credit to support the opening expenditures.

# Budget Summary

## Somerset Parks Academy Charter School

|                              | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|------------------------------|--------|--------|--------|--------|--------|
| Grades                       | K-5    | K-5    | K-5    | K-5    | K-5    |
| Students per grade (average) | 99     | 103    | 104    | 108    | 108    |
| Total # Students             | 395    | 515    | 625    | 648    | 648    |
| Per Student Revenue *        | 7,263  | 7,159  | 7,080  | 7,124  | 7,195  |
|                              |        | 1.0%   | 1.0%   | 1.0%   | 1.0%   |

### REVENUE

|                                        |           |           |           |           |           |
|----------------------------------------|-----------|-----------|-----------|-----------|-----------|
| Maximum Gross Revenue (\$)             | 2,876,120 | 3,722,852 | 4,460,236 | 4,644,839 | 4,691,287 |
| Enrollment Contingency (\$)            | 7,263     | 35,797    | 35,399    | 28,496    | 28,781    |
| Budgeted State Sources of Revenue (\$) | 2,868,857 | 3,687,056 | 4,424,838 | 4,616,343 | 4,662,506 |

### EXPENDITURES

|                                       |           |           |           |           |             |
|---------------------------------------|-----------|-----------|-----------|-----------|-------------|
| Facility Budget                       |           |           |           |           |             |
| Maximum Facility Expense              | 586,326   | 760,706   | 926,403   | 981,817   | 1,007,826   |
| Minimum Building Size Utilized (Sqft) | 21,725    | 26,780    | 32,500    | 33,696    | 33,696      |
| Cost per Student                      | \$ 900.00 | \$ 927.00 | \$ 954.81 | \$ 983.45 | \$ 1,012.96 |
| Operating and Fixed Costs             | 230,826   | 283,301   | 329,647   | 344,538   | 351,429     |
| Mortgage Payments/Rent                | 355,500   | 477,405   | 596,756   | 637,278   | 656,397     |
| Teacher Staffing Budget               |           |           |           |           |             |
| Average Class Size                    | 18        | 18        | 19        | 19        | 19          |
| # of Teachers                         | 25        | 31        | 37        | 38        | 38          |
| Salary Benefits per Teacher           | 9,218     | 9,712     | 9,963     | 10,171    | 10,375      |

|                                       |           |           |           |           |           |
|---------------------------------------|-----------|-----------|-----------|-----------|-----------|
| <b>MAXIMUM FOR OTHER EXPENDITURES</b> | 1,609,231 | 2,075,472 | 2,410,368 | 2,536,013 | 2,554,088 |
|---------------------------------------|-----------|-----------|-----------|-----------|-----------|

\* See All Charter School Calculator for Assumptions for the calculation of per pupil FTE

Budget Detail

| Somerse                                                                                          |                   |             | YEAR 1          |                 |                 | YEAR 2          | YEAR 3          | YEAR 4          | YEAR 5          |
|--------------------------------------------------------------------------------------------------|-------------------|-------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
|                                                                                                  |                   |             | Expected        | 75% Enrollment  | 50 % Enrollment |                 |                 |                 |                 |
| ENROLLMENT                                                                                       |                   |             |                 |                 |                 |                 |                 |                 |                 |
|                                                                                                  | Classrooms        |             | 22              | 17              | 11              | 28              | 33              | 34              | 34              |
| K - 5                                                                                            |                   |             | 395             | 296             | 197             | 515             | 625             | 648             | 648             |
| Total Enrollment                                                                                 |                   |             | 395             | 296             | 197             | 515             | 625             | 648             | 648             |
| REVENUES                                                                                         |                   |             |                 |                 |                 |                 |                 |                 |                 |
| State Sources with expected enrollment                                                           |                   |             | \$ 2,868,857.00 | \$ 2,149,827.02 | \$ 1,434,428.50 | \$ 3,722,852.16 | \$ 4,460,236.49 | \$ 4,644,838.91 | \$ 4,691,287.30 |
| Federal Sources - NSLP funds 60% of students                                                     | \$ 2.98           | 60%         | \$ 127,126.80   | \$ 95,264.64    | \$ 63,402.48    | \$ 169,062.55   | \$ 209,276.46   | \$ 221,317.39   | \$ 225,743.74   |
| Local Sources - Lunch program paid students                                                      | \$ 3.00           | 30%         | \$ 63,990.00    | \$ 47,952.00    | \$ 31,914.00    | \$ 85,098.60    | \$ 105,340.50   | \$ 111,401.37   | \$ 113,629.40   |
| Capital Outlay (Available 1st Year - Advance/Ed Accredited)                                      | \$ 185.00         | Per Student | \$ 73,075.00    | \$ 54,760.00    | \$ 36,445.00    | \$ 95,275.00    | \$ 115,625.00   | \$ 119,880.00   | \$ 119,880.00   |
| Other Sources - Services                                                                         |                   |             | \$ 39,500.00    | \$ 29,600.00    | \$ 19,700.00    | \$ 51,500.00    | \$ 62,500.00    | \$ 64,800.00    | \$ 64,800.00    |
|                                                                                                  |                   |             | \$ 3,172,548.80 | \$ 2,377,403.66 | \$ 1,585,889.98 | \$ 4,123,788.31 | \$ 4,952,978.45 | \$ 5,162,237.67 | \$ 5,215,340.43 |
| EXPENDITURES                                                                                     |                   |             |                 |                 |                 |                 |                 |                 |                 |
| <b>Instruction</b>                                                                               |                   |             |                 |                 |                 |                 |                 |                 |                 |
| Salaries (includes classroom teachers, contract or hourly, and teacher aides)                    | See Staffing Plan |             | \$ 960,235.00   | \$ 718,272.50   | \$ 453,117.50   | \$ 1,254,487.80 | \$ 1,535,997.14 | \$ 1,610,430.89 | \$ 1,642,639.51 |
| Fringe Benefits                                                                                  |                   |             | \$ 230,456.40   | \$ 172,385.40   | \$ 108,748.20   | \$ 301,077.07   | \$ 368,639.31   | \$ 386,503.41   | \$ 394,233.48   |
| Contracted Professional Services (includes Therapists & other contracted instructional services) | \$ 450.00         | ESE Student | \$ 21,330.00    | \$ 15,984.00    | \$ 10,638.00    | \$ 28,366.20    | \$ 35,113.50    | \$ 37,133.79    | \$ 37,876.47    |
| Classroom Supplies & Equipment                                                                   | \$ 45.00          | Student     | \$ 17,775.00    | \$ 13,320.00    | \$ 8,865.00     | \$ 23,638.50    | \$ 29,261.25    | \$ 30,944.83    | \$ 31,563.72    |
| Teacher Supplies                                                                                 | \$ 35.00          | Student     | \$ 13,825.00    | \$ 10,360.00    | \$ 6,895.00     | \$ 18,385.50    | \$ 22,758.75    | \$ 24,068.20    | \$ 24,549.56    |
| Textbooks and/or ebooks/Student Activities                                                       | \$ 185.00         | Student     | \$ 73,075.00    | \$ 54,760.00    | \$ 36,445.00    | \$ 97,180.50    | \$ 60,148.13    | \$ 63,608.81    | \$ 32,440.49    |
| Supplemental instructional materials (CIRP/SIRP and Technology)                                  | \$ 75.00          | Student     | \$ 29,625.00    | \$ 22,200.00    | \$ 14,775.00    | \$ 39,397.50    | \$ 48,768.75    | \$ 51,574.71    | \$ 52,606.20    |
| Digital Education Content Materials (Leased)                                                     | \$ 150.00         | Student     | \$ 59,250.00    | \$ 44,400.00    | \$ 29,550.00    | \$ 78,795.00    | \$ 97,537.50    | \$ 103,149.42   | \$ 105,212.41   |
| Computer - Equipment for Instruction (leased)                                                    | \$ 1,800.00       | Classroom   | \$ 39,600.00    | \$ 30,600.00    | \$ 19,800.00    | \$ 51,408.00    | \$ 61,799.76    | \$ 64,945.93    | \$ 66,244.85    |
| Sub-Total Instruction                                                                            |                   |             | \$ 1,445,171.40 | \$ 1,082,281.90 | \$ 696,333.70   | \$ 1,892,736.07 | \$ 2,260,024.09 | \$ 2,372,359.99 | \$ 2,387,366.69 |
| <b>Pupil Personnel Services</b>                                                                  |                   |             |                 |                 |                 |                 |                 |                 |                 |
| Salaries (includes counselor, school nurse, health assistant)                                    | See Staffing Plan |             | \$ 42,000.00    | \$ 42,000.00    | \$ 21,000.00    | \$ 42,840.00    | \$ 43,696.80    | \$ 44,570.74    | \$ 45,462.15    |
| Fringe Benefits                                                                                  |                   |             | \$ 10,080.00    | \$ 10,080.00    | \$ 5,040.00     | \$ 10,281.60    | \$ 10,487.23    | \$ 10,696.98    | \$ 10,910.92    |
| Contracted Professional Services (counseling and psychological)                                  | \$ 850.00         | ESE Student | \$ 40,290.00    | \$ 30,192.00    | \$ 20,094.00    | \$ 53,580.60    | \$ 66,325.50    | \$ 70,141.60    | \$ 71,544.44    |
| Sub-Total Pupil Personnel Services                                                               |                   |             | \$ 92,370.00    | \$ 82,272.00    | \$ 46,134.00    | \$ 106,702.20   | \$ 120,509.53   | \$ 125,409.32   | \$ 127,917.50   |
| <b>Media Services</b>                                                                            |                   |             |                 |                 |                 |                 |                 |                 |                 |
| Salaries (includes Librarian)                                                                    |                   |             | \$ -            | \$ -            | \$ -            | \$ 41,820.00    | \$ 42,656.40    | \$ 43,509.53    | \$ 44,379.72    |
| Fringe Benefits                                                                                  |                   |             | \$ -            | \$ -            | \$ -            | \$ 10,036.80    | \$ 10,237.54    | \$ 10,442.29    | \$ 10,651.13    |
| Sub-Total Media Services                                                                         |                   |             | \$ -            | \$ -            | \$ -            | \$ 51,856.80    | \$ 52,893.94    | \$ 53,951.81    | \$ 55,030.85    |
| <b>Curriculum Development</b>                                                                    |                   |             |                 |                 |                 |                 |                 |                 |                 |
| Salaries (includes Curriculum Specialist)                                                        |                   |             | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            |
| Fringe Benefits                                                                                  |                   |             | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            |
| Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)                    | \$ 115.00         | Student     | \$ 45,425.00    | \$ 34,040.00    | \$ 22,655.00    | \$ 60,409.50    | \$ 74,778.75    | \$ 79,081.22    | \$ 80,662.84    |
| Student Activities                                                                               | \$ 15.00          | Student     | \$ 5,925.00     | \$ 4,440.00     | \$ 2,955.00     | \$ 7,879.50     | \$ 9,753.75     | \$ 10,314.94    | \$ 10,521.24    |
| Sub-Total Curriculum Development                                                                 |                   |             | \$ 51,350.00    | \$ 38,480.00    | \$ 25,610.00    | \$ 68,289.00    | \$ 84,532.50    | \$ 89,396.16    | \$ 91,184.09    |
| <b>Staff Development</b>                                                                         |                   |             |                 |                 |                 |                 |                 |                 |                 |
| Workshops/Trainings                                                                              | \$ 1,000.00       | Teacher     | \$ 25,000.00    | \$ 18,000.00    | \$ 11,000.00    | \$ 31,000.00    | \$ 37,000.00    | \$ 38,000.00    | \$ 38,000.00    |
| Sub-Total Staff Development                                                                      |                   |             | \$ 25,000.00    | \$ 18,000.00    | \$ 11,000.00    | \$ 31,000.00    | \$ 37,000.00    | \$ 38,000.00    | \$ 38,000.00    |

Budget Detail

| Somerset Parks Academy Charter School                                |             |                  | YEAR 1        |                |                 | YEAR 2        | YEAR 3        | YEAR 4        | YEAR 5        |
|----------------------------------------------------------------------|-------------|------------------|---------------|----------------|-----------------|---------------|---------------|---------------|---------------|
|                                                                      |             |                  | Expected      | 75% Enrollment | 50 % Enrollment |               |               |               |               |
| <b>Instruction Related Technology</b>                                |             |                  |               |                |                 |               |               |               |               |
| Salaries (includes Technology Personnel)                             |             |                  | \$ -          | \$ -           | \$ -            | \$ -          | \$ -          | \$ -          | \$ -          |
| Fringe Benefits                                                      |             |                  | \$ -          | \$ -           | \$ -            | \$ -          | \$ -          | \$ -          | \$ -          |
| Software and Scanner                                                 | \$ 1,200.00 | School           | \$ 1,200.00   | \$ 1,200.00    | \$ 1,200.00     | \$ 1,224.00   | \$ 1,248.48   | \$ 1,273.45   | \$ 1,298.92   |
| Hardware Maintenance                                                 | \$ 400.00   | Classroom        | \$ 8,800.00   | \$ 6,800.00    | \$ 4,400.00     | \$ 11,424.00  | \$ 13,733.28  | \$ 14,432.43  | \$ 14,721.08  |
| <b>Sub-Total Instruction Related Technology</b>                      |             |                  | \$ 10,000.00  | \$ 8,000.00    | \$ 5,600.00     | \$ 12,648.00  | \$ 14,981.76  | \$ 15,705.88  | \$ 16,020.00  |
| <b>Board</b>                                                         |             |                  |               |                |                 |               |               |               |               |
| Professional Services (Legal)                                        | \$ 2,500.00 | School           | \$ 2,500.00   | \$ 2,500.00    | \$ 2,500.00     | \$ 2,550.00   | \$ 2,601.00   | \$ 2,653.02   | \$ 2,706.08   |
| Insurance (General Liability, D&O, Professional Liability)           | \$ 925.00   | Classroom        | \$ 20,350.00  | \$ 15,725.00   | \$ 10,175.00    | \$ 26,418.00  | \$ 31,758.21  | \$ 33,374.99  | \$ 34,042.49  |
| Travel                                                               | \$ 2,000.00 | Board Mem        | \$ 2,000.00   | \$ 2,000.00    | \$ 2,000.00     | \$ 2,040.00   | \$ 2,080.80   | \$ 2,122.42   | \$ 2,164.86   |
| <b>Sub-Total Board</b>                                               |             |                  | \$ 24,850.00  | \$ 20,225.00   | \$ 14,675.00    | \$ 31,008.00  | \$ 36,440.01  | \$ 38,150.43  | \$ 38,913.44  |
| <b>General Administration</b>                                        |             |                  |               |                |                 |               |               |               |               |
| Management Fees (Portion of the \$450 fee charged by ESP)            | \$ 225.00   | Student          | \$ 88,875.00  | \$ 66,600.00   | \$ 44,325.00    | \$ 118,192.50 | \$ 146,306.25 | \$ 154,724.13 | \$ 157,818.61 |
| Administrative Fee                                                   |             |                  |               |                |                 |               |               |               |               |
| <b>Sub-Total General Administration</b>                              |             |                  | \$ 88,875.00  | \$ 66,600.00   | \$ 44,325.00    | \$ 118,192.50 | \$ 146,306.25 | \$ 154,724.13 | \$ 157,818.61 |
| <b>School Administration</b>                                         |             |                  |               |                |                 |               |               |               |               |
| Salaries (includes Principal, Secretary & other Office Personnel)    |             |                  | \$ 113,081.08 | \$ 113,081.08  | \$ 113,081.08   | \$ 138,802.70 | \$ 228,972.36 | \$ 233,551.80 | \$ 238,222.84 |
| Fringe Benefits                                                      |             |                  | \$ 27,139.46  | \$ 27,139.46   | \$ 27,139.46    | \$ 33,312.65  | \$ 54,953.37  | \$ 56,052.43  | \$ 57,173.48  |
| Equipment Rental / Lease                                             | \$ 300.00   | Per Month        | \$ 3,600.00   | \$ 3,600.00    | \$ 3,600.00     | \$ 3,672.00   | \$ 3,745.44   | \$ 3,820.35   | \$ 3,896.76   |
| Travel                                                               | \$ 1,200.00 | Administrator    | \$ 2,400.00   | \$ 2,400.00    | \$ 2,400.00     | \$ 2,448.00   | \$ 2,496.96   | \$ 2,546.90   | \$ 2,597.84   |
| Advertising and Promotion                                            | \$ 5.00     | Student          | \$ 1,975.00   | \$ 1,480.00    | \$ 985.00       | \$ 2,628.50   | \$ 3,251.25   | \$ 3,436.31   | \$ 3,507.08   |
| License Fees                                                         | \$ 200.00   |                  | \$ 200.00     | \$ 200.00      | \$ 200.00       | \$ 204.00     | \$ 208.08     | \$ 212.24     | \$ 216.49     |
| Dues and Subscriptions                                               | \$ 4.00     | Student          | \$ 1,580.00   | \$ 1,184.00    | \$ 788.00       | \$ 2,101.20   | \$ 2,601.00   | \$ 2,750.65   | \$ 2,805.66   |
| Postage                                                              | \$ 50.00    | Classroom        | \$ 1,100.00   | \$ 850.00      | \$ 550.00       | \$ 1,428.00   | \$ 1,716.66   | \$ 1,804.05   | \$ 1,840.13   |
| Printing                                                             | \$ 225.00   | Classroom        | \$ 4,950.00   | \$ 3,825.00    | \$ 2,475.00     | \$ 6,426.00   | \$ 7,724.97   | \$ 8,118.24   | \$ 8,280.61   |
| Office Supplies                                                      | \$ 25.00    | Student          | \$ 9,875.00   | \$ 7,400.00    | \$ 4,925.00     | \$ 12,875.00  | \$ 15,625.00  | \$ 16,200.00  | \$ 16,200.00  |
| Office Equipment                                                     | \$ 1,500.00 |                  | \$ 1,500.00   | \$ 1,500.00    | \$ 1,500.00     | \$ 1,530.00   | \$ 1,560.60   | \$ 1,591.81   | \$ 1,623.65   |
| Computer Equipment                                                   | \$ 1,000.00 | Administrator    | \$ 2,000.00   | \$ 2,000.00    | \$ 2,000.00     | \$ 2,040.00   | \$ 2,080.80   | \$ 2,122.42   | \$ 2,164.86   |
| <b>Sub-Total School Administration</b>                               |             |                  | \$ 169,400.54 | \$ 164,659.54  | \$ 159,643.54   | \$ 207,466.05 | \$ 324,936.48 | \$ 332,209.21 | \$ 338,529.40 |
| <b>Facilities Acquisition &amp; Construction</b>                     |             |                  |               |                |                 |               |               |               |               |
| Building Lease / Rent (see budget summary for calculation)           |             |                  | \$ 355,500.00 | \$ 266,400.00  | \$ 177,750.00   | \$ 477,405.00 | \$ 596,756.25 | \$ 637,278.39 | \$ 656,396.74 |
| <b>Sub-Total Facilities Acquisition &amp; Construction</b>           |             |                  | \$ 355,500.00 | \$ 266,400.00  | \$ 177,750.00   | \$ 477,405.00 | \$ 596,756.25 | \$ 637,278.39 | \$ 656,396.74 |
| <b>Fiscal Services</b>                                               |             |                  |               |                |                 |               |               |               |               |
| Salaries (Business Manager, Accounting & Bookkeeping Personnel)      |             |                  | \$ 40,000.00  | \$ 40,000.00   | \$ 20,000.00    | \$ 40,800.00  | \$ 41,616.00  | \$ 42,448.32  | \$ 43,297.29  |
| Fringe Benefits                                                      |             |                  | \$ 9,600.00   | \$ 9,600.00    | \$ 4,800.00     | \$ 9,792.00   | \$ 9,987.84   | \$ 10,187.60  | \$ 10,391.35  |
| Fee to County School Board - up to 250 students                      |             |                  | \$ 90,786.61  | \$ 90,786.61   | \$ 71,539.85    | \$ 89,491.64  | \$ 88,496.76  | \$ 89,049.83  | \$ 89,940.32  |
| Planning, Research, Development and Evaluation (Part of ESP's Fee)   | \$ 110.00   |                  | \$ 43,450.00  | \$ 32,560.00   | \$ 21,670.00    | \$ 57,783.00  | \$ 71,527.50  | \$ 75,642.91  | \$ 77,155.76  |
| Professional Services - Annual Audit                                 | \$ 8,500.00 |                  | \$ 8,500.00   | \$ 8,500.00    | \$ 8,500.00     | \$ 8,670.00   | \$ 8,843.40   | \$ 9,020.27   | \$ 9,200.67   |
| <b>Sub-Total Fiscal Services</b>                                     |             |                  | \$ 192,336.61 | \$ 181,446.61  | \$ 126,509.85   | \$ 206,536.64 | \$ 220,471.50 | \$ 226,348.92 | \$ 229,985.40 |
| <b>Food Services</b>                                                 |             |                  |               |                |                 |               |               |               |               |
| Salaries (Food Service Workers)                                      |             |                  | \$ 28,000.00  | \$ 14,000.00   | \$ 14,000.00    | \$ 28,560.00  | \$ 29,131.20  | \$ 29,713.82  | \$ 30,308.10  |
| Fringe Benefits                                                      |             |                  | \$ 6,720.00   | \$ 3,360.00    | \$ 3,360.00     | \$ 6,854.40   | \$ 6,991.49   | \$ 7,131.32   | \$ 7,273.94   |
| Food, Materials & Supplies - Vendor provided meals 90% Participation | \$ 2.46     | Per Meal per day | \$ 157,415.40 | \$ 117,961.92  | \$ 78,508.44    | \$ 209,342.56 | \$ 259,137.63 | \$ 274,047.37 | \$ 279,528.32 |
| Equipment Rental / Lease (provided by food vendor)                   |             |                  |               |                |                 |               |               |               |               |
| Inspection fees                                                      | \$ 75.00    | Twice per year   | \$ 150.00     | \$ 150.00      | \$ 150.00       | \$ 153.00     | \$ 156.06     | \$ 159.18     | \$ 162.36     |
| <b>Sub-Total Food Services</b>                                       |             |                  | \$ 192,285.40 | \$ 135,471.92  | \$ 96,018.44    | \$ 244,909.96 | \$ 295,416.38 | \$ 311,051.70 | \$ 317,272.73 |

Budget Detail

| Somerset Parks Academy Charter School                                      |              |               | YEAR 1          |                 |                 | YEAR 2          | YEAR 3          | YEAR 4          | YEAR 5          |
|----------------------------------------------------------------------------|--------------|---------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
|                                                                            |              |               | Expected        | 75% Enrollment  | 50 % Enrollment |                 |                 |                 |                 |
| <b>Pupil Transportation Services</b>                                       |              |               |                 |                 |                 |                 |                 |                 |                 |
| Salaries (Drivers & Transportation workers)                                | See Staffing |               | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            |
| Fringe Benefits                                                            |              |               | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            |
| Contracted Transportation Services - \$235 per bus per day 20% utilization | \$ 290.00    | 20%           | \$ 104,400.00   | \$ 52,200.00    | \$ 52,200.00    | \$ 104,400.00   | \$ 104,400.00   | \$ 104,400.00   | \$ 104,400.00   |
| <b>Sub-Total Pupil Transportation Services</b>                             |              |               | \$ 104,400.00   | \$ 54,700.00    | \$ 54,700.00    | \$ 104,400.00   | \$ 104,400.00   | \$ 104,400.00   | \$ 104,400.00   |
| <b>Operation of Plant</b>                                                  |              |               |                 |                 |                 |                 |                 |                 |                 |
| Salaries (Custodian, crossing guards, security)                            | See Staffing |               | \$ 41,601.60    | \$ 20,800.80    | \$ -            | \$ 42,433.63    | \$ 43,282.30    | \$ 44,147.95    | \$ 45,030.91    |
| Fringe benefits                                                            |              |               | \$ 9,984.38     | \$ 4,992.19     | \$ -            | \$ 10,184.07    | \$ 10,387.75    | \$ 10,595.51    | \$ 10,807.42    |
| Purchased Service (Custodial, fire and alarm, etc)                         | \$ 2,500.00  | Per Classroom | \$ 55,000.00    | \$ 42,500.00    | \$ 27,500.00    | \$ 71,400.00    | \$ 85,833.00    | \$ 90,202.68    | \$ 92,006.73    |
| Lawn Maintenance                                                           | \$ 200.00    | Per Classroom | \$ 4,400.00     | \$ 3,400.00     | \$ 2,200.00     | \$ 5,712.00     | \$ 6,866.64     | \$ 7,216.21     | \$ 7,360.54     |
| Pest Control                                                               | \$ 40.00     | Per Classroom | \$ 880.00       | \$ 680.00       | \$ 440.00       | \$ 1,142.40     | \$ 1,373.33     | \$ 1,443.24     | \$ 1,472.11     |
| Security Services                                                          | \$ 300.00    | Per Month     | \$ 3,600.00     | \$ 3,600.00     | \$ 3,600.00     | \$ 3,672.00     | \$ 3,745.44     | \$ 3,820.35     | \$ 3,896.76     |
| Property Insurance                                                         | \$ 2,400.00  | Per Classroom | \$ 52,800.00    | \$ 40,800.00    | \$ 26,400.00    | \$ 68,544.00    | \$ 82,399.68    | \$ 86,594.57    | \$ 88,326.46    |
| Telephone Services                                                         | \$ 300.00    | Per Month     | \$ 3,600.00     | \$ 3,600.00     | \$ 3,600.00     | \$ 3,672.00     | \$ 3,745.44     | \$ 3,820.35     | \$ 3,896.76     |
| Water & Sewer                                                              | \$ 80.00     | Per Classroom | \$ 1,760.00     | \$ 1,360.00     | \$ 880.00       | \$ 2,284.80     | \$ 2,746.66     | \$ 2,886.49     | \$ 2,944.22     |
| Electricity                                                                | \$ 2,600.00  | Per Classroom | \$ 57,200.00    | \$ 44,200.00    | \$ 28,600.00    | \$ 74,256.00    | \$ 89,266.32    | \$ 93,810.79    | \$ 95,687.00    |
| <b>Sub-Total Operation of Plant</b>                                        |              |               | \$ 230,825.98   | \$ 165,932.99   | \$ 93,220.00    | \$ 283,300.90   | \$ 329,646.56   | \$ 344,538.14   | \$ 351,428.90   |
| <b>Maintenance of Plant</b>                                                |              |               |                 |                 |                 |                 |                 |                 |                 |
| Repairs & Maintenance                                                      | \$ 1.50      | Sq. Ft.       | \$ 32,587.50    | \$ 15,392.00    | \$ 5,135.00     | \$ 40,170.00    | \$ 48,750.00    | \$ 50,544.00    | \$ 50,544.00    |
| Supplies                                                                   |              |               | \$ 32,587.50    | \$ 15,392.00    | \$ 5,135.00     | \$ 40,170.00    | \$ 48,750.00    | \$ 50,544.00    | \$ 50,544.00    |
| <b>Sub-Total Maintenance of Plant</b>                                      |              |               | \$ 32,587.50    | \$ 15,392.00    | \$ 5,135.00     | \$ 40,170.00    | \$ 48,750.00    | \$ 50,544.00    | \$ 50,544.00    |
| <b>Administrative Technology Services</b>                                  |              |               |                 |                 |                 |                 |                 |                 |                 |
| Systems Operation                                                          | \$ 750.00    | Per Classroom | \$ 16,500.00    | \$ 12,750.00    | \$ 8,250.00     | \$ 21,420.00    | \$ 25,749.90    | \$ 27,060.80    | \$ 27,602.02    |
| Systems Planning & Analysis                                                |              |               | \$ 16,500.00    | \$ 12,750.00    | \$ 8,250.00     | \$ 21,420.00    | \$ 25,749.90    | \$ 27,060.80    | \$ 27,602.02    |
| <b>Sub-Total Administrative Technology Services</b>                        |              |               | \$ 16,500.00    | \$ 12,750.00    | \$ 8,250.00     | \$ 21,420.00    | \$ 25,749.90    | \$ 27,060.80    | \$ 27,602.02    |
| Redemption of Principal Interest (Interest Only at 6%)                     |              |               | \$ 1,500.00     | \$ 1,500.00     | \$ 1,500.00     | \$ 25,000.00    |                 |                 |                 |
| <b>Sub-Total Debt Service</b>                                              |              |               | \$ 1,500.00     | \$ 1,500.00     | \$ 1,500.00     | \$ 25,000.00    | \$ -            | \$ -            | \$ -            |
| <b>Contingency</b>                                                         |              |               |                 |                 |                 |                 |                 |                 |                 |
| Operating expense contingency - 3% of FEFP - Considered restricted funds   | 3%           |               | \$ 95,176.46    | \$ 35,661.05    | \$ 9,515.34     | \$ 123,713.65   | \$ 148,589.35   | \$ 154,867.13   | \$ 156,460.21   |
| <b>Sub-Total Contingency</b>                                               |              |               | \$ 95,176.46    | \$ 35,661.05    | \$ 9,515.34     | \$ 123,713.65   | \$ 148,589.35   | \$ 154,867.13   | \$ 156,460.21   |
| <b>Total Expenditures</b>                                                  |              |               | \$ 3,128,128.90 | \$ 2,349,773.02 | \$ 1,575,919.87 | \$ 4,046,754.77 | \$ 4,847,404.50 | \$ 5,075,996.00 | \$ 5,144,870.57 |
| <b>Excess of Revenues over Expenditures</b>                                |              |               | \$ 44,419.90    | \$ 27,630.64    | \$ 9,970.11     | \$ 77,033.54    | \$ 105,573.95   | \$ 86,241.67    | \$ 70,469.86    |



| Somerset Parks Academy Charter School                                                            |                   |               |                                                                                                                                                                                                                         |
|--------------------------------------------------------------------------------------------------|-------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| REVENUES                                                                                         |                   |               |                                                                                                                                                                                                                         |
| State Sources with expected enrollment                                                           |                   |               | FEFP Revenue utilizing the revenue worksheet provided by the FLDOE                                                                                                                                                      |
| Federal Sources - NSLP funds 60% of students                                                     | \$ 2.98           | 60%           | The reimbursement provided by the National School Lunch Program (NSLP)                                                                                                                                                  |
| Local Sources - Lunch program paid students                                                      | \$ 3.00           | 30%           | The amount per meal for paid lunches                                                                                                                                                                                    |
| Capital Outlay (Available 1st Year - Advance/Ed Accredited)                                      | \$ 185.00         | Per Student   | An estimate of the capital outlay amount based on the \$50 million allocated for the 2012-13 school year. The amount is kept constant for each year of the budget. The school is part of a district accredited network. |
| Other Sources - Services                                                                         |                   |               | Revenue from before care/after care, fund raising activities, field trips, and other internal revenue                                                                                                                   |
| EXPENDITURES                                                                                     |                   |               |                                                                                                                                                                                                                         |
| <b>Instruction</b>                                                                               |                   |               |                                                                                                                                                                                                                         |
| Salaries (includes classroom teachers, contract or hourly, and teacher aides)                    | See Staffing Plan |               | Salaries in the staffing plan are for Full Time Equivalent (FTE) instruction positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.     |
| Fringe Benefits                                                                                  |                   |               | As calculated in the staffing plan                                                                                                                                                                                      |
| Contracted Professional Services (includes Therapists & other contracted instructional services) | \$ 450.00         | ESE Student   | Contracted instructional services as outlined in the application                                                                                                                                                        |
| Classroom Supplies & Equipment                                                                   | \$ 45.00          | Student       | Student Agendas, Classroom Supplies and other items used within the classroom                                                                                                                                           |
| Teacher Supplies                                                                                 | \$ 35.00          | Student       | Supplies for the teacher to outfit the classroom                                                                                                                                                                        |
| Textbooks and/or ebooks/Student Activities                                                       | \$ 185.00         | Student       | Textbooks and other instructional materials as described in the curriculum section of the application                                                                                                                   |
| Supplemental instructional materials (CIRP/SIRP and Technology)                                  | \$ 75.00          | Student       | Other supplemental curriculum as detailed in the application                                                                                                                                                            |
| Digital Education Content Materials (Leased)                                                     | \$ 150.00         | Student       | Digital content material as described in the curriculum section. The materials would be funded over time. Expenditure listed is for the annual costs.                                                                   |
| Computer - Equipment for Instruction (leased)                                                    | \$ 1,800.00       | Classroom     | Computer equipment to be utilized in the classroom. The expenditure outlined is the annual cost to lease the equipment on a three lease. If the school receives a CSP grant the equipment would be purchased            |
| <i>Sub-Total Instruction</i>                                                                     |                   |               |                                                                                                                                                                                                                         |
| <b>Pupil Personnel Services</b>                                                                  |                   |               |                                                                                                                                                                                                                         |
| Salaries (includes counselor, school nurse, health assistant)                                    | See Staffing Plan |               | Salaries in the staffing plan are for Full Time Equivalent (FTE) positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.                 |
| Fringe Benefits                                                                                  |                   |               | As calculated in the staffing plan                                                                                                                                                                                      |
| Contracted Professional Services (counseling and psychological)                                  | \$ 850.00         | ESE Student   | Contracted instructional support services as outlined in the application (eg. ESE Specialist, counselor)                                                                                                                |
| <i>Sub-Total Pupil Personnel Services</i>                                                        |                   |               |                                                                                                                                                                                                                         |
| <b>Media Services</b>                                                                            |                   |               |                                                                                                                                                                                                                         |
| Salaries (includes Librarian)                                                                    |                   |               | Salaries in the staffing plan are for Full Time Equivalent (FTE) media service positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.   |
| Fringe Benefits                                                                                  |                   |               | As calculated in the staffing plan                                                                                                                                                                                      |
| <i>Sub-Total Media Services</i>                                                                  |                   |               |                                                                                                                                                                                                                         |
| <b>Curriculum Development</b>                                                                    |                   |               |                                                                                                                                                                                                                         |
| Salaries (includes Curriculum Specialist)                                                        |                   |               | Salaries in the staffing plan are for Full Time Equivalent (FTE) curriculum positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.      |
| Fringe Benefits                                                                                  |                   |               | As calculated in the staffing plan                                                                                                                                                                                      |
| Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)                    | \$ 115.00         | Student       | The services provided in the ESP's \$450 per student fee for Curriculum Planning, Research, Development and Evaluation - The amount stated is a component of the ESP fee                                                |
| Student Activities                                                                               | \$ 15.00          | Student       |                                                                                                                                                                                                                         |
| <i>Sub-Total Curriculum Development</i>                                                          |                   |               |                                                                                                                                                                                                                         |
| <b>Staff Development</b>                                                                         |                   |               |                                                                                                                                                                                                                         |
| Workshops/Trainings                                                                              | \$ 1,000.00       | Teacher       | The costs associated with providing staff development as described in the application                                                                                                                                   |
| <i>Sub-Total Staff Development</i>                                                               |                   |               |                                                                                                                                                                                                                         |
| <b>Instruction Related Technology</b>                                                            |                   |               |                                                                                                                                                                                                                         |
| Salaries (includes Technology Personnel)                                                         |                   |               |                                                                                                                                                                                                                         |
| Fringe Benefits                                                                                  |                   |               |                                                                                                                                                                                                                         |
| EduSoft Software and Scanner                                                                     | \$ 1,200.00       | School        | The costs associated with maintaining the computer hardware. This amount is paid to outside contractors.                                                                                                                |
| Hardware Maintenance                                                                             | \$ 400.00         | Classroom     |                                                                                                                                                                                                                         |
| <i>Sub-Total Instruction Related Technology</i>                                                  |                   |               |                                                                                                                                                                                                                         |
| <b>Board</b>                                                                                     |                   |               |                                                                                                                                                                                                                         |
| Professional Services (Legal)                                                                    | \$ 2,500.00       | School        | Outside legal expenses                                                                                                                                                                                                  |
| Insurance (General Liability, D&O, Professional Liability)                                       | \$ 925.00         | Classroom     | The costs of the Professional Educators Liability policy                                                                                                                                                                |
| Travel                                                                                           | \$ 2,000.00       | Board Mem     | The costs for board members to attend meetings and/or conferences                                                                                                                                                       |
| <i>Sub-Total Board</i>                                                                           |                   |               |                                                                                                                                                                                                                         |
| <b>General Administration</b>                                                                    |                   |               |                                                                                                                                                                                                                         |
| Management Fees (Portion of the \$450 fee charged by ESP)                                        | \$ 225.00         | Student       | The portion of the management fee allocated for General administrative services                                                                                                                                         |
| Administrative Fee                                                                               |                   |               |                                                                                                                                                                                                                         |
| <i>Sub-Total General Administration</i>                                                          |                   |               |                                                                                                                                                                                                                         |
| <b>School Administration</b>                                                                     |                   |               |                                                                                                                                                                                                                         |
| Salaries (includes Principal, Secretary & other Office Personnel)                                |                   |               |                                                                                                                                                                                                                         |
| Fringe Benefits                                                                                  |                   |               |                                                                                                                                                                                                                         |
| Equipment Rental / Lease                                                                         | \$ 300.00         | Per Month     | Office equipment leases                                                                                                                                                                                                 |
| Travel                                                                                           | \$ 1,200.00       | Administrator | Travel expense for the administrative staff to attend meetings and workshops.                                                                                                                                           |
| Advertising and Promotion                                                                        | \$ 5.00           | Student       | Expenditures related to the marketing of the school. This amount includes items such as direct mail, banners, etc.                                                                                                      |
| License Fees                                                                                     | \$ 200.00         |               | Annual Government license fees                                                                                                                                                                                          |
| Dues and Subscriptions                                                                           | \$ 4.00           | Student       | Costs for subscription services. Membership in the Florida Consortium of Public Charter Schools is included here. The school utilizes the FCPCS teacher evaluation system.                                              |
| Postage                                                                                          | \$ 50.00          | Classroom     | Postage and overnight mail costs                                                                                                                                                                                        |
| Printing                                                                                         | \$ 225.00         | Classroom     | Printing material and supplies                                                                                                                                                                                          |
| Office Supplies                                                                                  | \$ 25.00          | Student       | General office supplies                                                                                                                                                                                                 |
| Office Equipment                                                                                 | \$ 1,500.00       |               | Annual costs of the office equipment                                                                                                                                                                                    |
| Computer Equipment                                                                               | \$ 1,000.00       | Administrator | Annual costs of the administrative computer equipment                                                                                                                                                                   |
| <i>Sub-Total School Administration</i>                                                           |                   |               |                                                                                                                                                                                                                         |

**Somerset Parks Academy Charter School**

|                                                                            |              |                  |                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------|--------------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Facilities Acquisition &amp; Construction</b>                           |              |                  |                                                                                                                                                                                                                            |
| Building Lease / Rent (see budget summary for calculation)                 |              |                  | Facility lease costs as outlined in the budget summary and the facility section of the application                                                                                                                         |
| <i>Sub-Total Facilities Acquisition &amp; Construction</i>                 |              |                  |                                                                                                                                                                                                                            |
| <b>Fiscal Services</b>                                                     |              |                  |                                                                                                                                                                                                                            |
| Salaries (Business Manager, Accounting & Bookkeeping Personnel)            |              |                  | Salaries in the staffing plan are for Full Time Equivalent (FTE) fiscal service positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.     |
| Fringe Benefits                                                            |              |                  | As calculated in the staffing plan                                                                                                                                                                                         |
| Fee to County School Board - up to 250 students                            |              |                  | The fee paid to the school district as stipulated in statute                                                                                                                                                               |
| Planning, Research, Development and Evaluation (Part of ESP's Fee)         | \$ 110.00    |                  | The portion of the fee paid to the ESP for providing back office accounting and other fiscal services.                                                                                                                     |
| Professional Services - Annual Audit                                       | \$ 8,500.00  |                  | The costs of the annual audit paid to the outside auditor                                                                                                                                                                  |
| <i>Sub-Total Fiscal Services</i>                                           |              |                  |                                                                                                                                                                                                                            |
| <b>Food Services</b>                                                       |              |                  |                                                                                                                                                                                                                            |
| Salaries (Food Service Workers)                                            |              |                  | Salaries in the staffing plan are for Full Time Equivalent (FTE) food service positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan.       |
| Fringe Benefits                                                            |              |                  | As calculated in the staffing plan                                                                                                                                                                                         |
| Food, Materials & Supplies - Vendor provided meals 90% Participation       | \$ 2.46      | Per Meal per day | The contract cost per meal paid to an approved NSLP provider                                                                                                                                                               |
| Equipment Rental / Lease (provided by food vendor)                         | \$ -         |                  | No cost. The equipment is provided by the NSLP provider                                                                                                                                                                    |
| Inspection fees                                                            | \$ 75.00     | Twice per year   | Health inspection fees                                                                                                                                                                                                     |
| <i>Sub-Total Food Services</i>                                             |              |                  |                                                                                                                                                                                                                            |
| <b>Pupil Transportation Services</b>                                       |              |                  |                                                                                                                                                                                                                            |
| Salaries (Drivers & Transportation workers)                                |              |                  | N/A                                                                                                                                                                                                                        |
| Fringe Benefits                                                            |              |                  |                                                                                                                                                                                                                            |
| Contracted Transportation Services - \$235 per bus per day 20% utilization | \$ 290.00    | 40%              | The cost for providing busing. The percentage of students that will be utilizing busing. The cost is per bus per day based on a 65 student capacity bus                                                                    |
| <i>Sub-Total Pupil Transportation Services</i>                             |              |                  |                                                                                                                                                                                                                            |
| <b>Operation of Plant</b>                                                  |              |                  |                                                                                                                                                                                                                            |
| Salaries (Custodian, crossing guards, security)                            | See Staffing |                  | Salaries in the staffing plan are for Full Time Equivalent (FTE) Operation of Plant positions. Individuals may be utilized for other functions and the expenditure presented is for the FTE outlined in the staffing plan. |
| Fringe benefits                                                            |              |                  | As calculated in the staffing plan                                                                                                                                                                                         |
| Purchased Service (Custodial, fire and alarm, etc)                         | \$ 2,500.00  | Per Classroom    | The costs for contracted custodial services and other contracted service for the operation of the facility                                                                                                                 |
| Lawn Maintenance                                                           | \$ 200.00    | Per Classroom    | Contracted lawn service                                                                                                                                                                                                    |
| Pest Control                                                               | \$ 40.00     | Per Classroom    | Contracted pest service                                                                                                                                                                                                    |
| Security Services                                                          | \$ 300.00    | Per Month        | Contracted security alarm monitoring                                                                                                                                                                                       |
| Property Insurance                                                         | \$ 2,400.00  | Per Classroom    | The expenditure for property insurance including windstorm                                                                                                                                                                 |
| Telephone Services                                                         | \$ 300.00    | Per Month        | Monthly phone service expenses                                                                                                                                                                                             |
| Water & Sewer                                                              | \$ 80.00     | Per Classroom    | City Water & Sewer costs                                                                                                                                                                                                   |
| Electricity                                                                | \$ 2,600.00  | Per Classroom    | The costs electrical service                                                                                                                                                                                               |
| <i>Sub-Total Operation of Plant</i>                                        |              |                  |                                                                                                                                                                                                                            |
| <b>Maintenance of Plant</b>                                                |              |                  |                                                                                                                                                                                                                            |
| Repairs & Maintenance                                                      | \$ 1.50      | Sq. Ft.          | Repairs & Maintained of the facility                                                                                                                                                                                       |
| Supplies                                                                   | \$ -         |                  |                                                                                                                                                                                                                            |
| <i>Sub-Total Maintenance of Plant</i>                                      |              |                  |                                                                                                                                                                                                                            |
| <b>Administrative Technology Services</b>                                  |              |                  |                                                                                                                                                                                                                            |
| Systems Operation                                                          | \$ 750.00    | Per Classroom    | Contracted costs to maintain the IT infrastructure                                                                                                                                                                         |
| Systems Planning & Analysis                                                | \$ -         |                  |                                                                                                                                                                                                                            |
| <i>Sub-Total Administrative Technology Services</i>                        |              |                  |                                                                                                                                                                                                                            |
| Redemption of Principal                                                    | 0            |                  | Repayment of start up loan                                                                                                                                                                                                 |
| Interest (Interest Only at 6%)                                             | 0            |                  | Interest on start up loan                                                                                                                                                                                                  |
| <i>Sub-Total Debt Service</i>                                              |              |                  |                                                                                                                                                                                                                            |
| <b>Contingency</b>                                                         |              |                  |                                                                                                                                                                                                                            |
| Operating expense contingency - 3% of FEFP - Considered restricted funds   | 3%           |                  |                                                                                                                                                                                                                            |

# Staffing Plan

# Somerset Parks Academy Charter School

|                               |                              |
|-------------------------------|------------------------------|
| Fringe Benefit Rate           | 24.00%                       |
| FICA                          | 6.20%                        |
| Medicare                      | 1.45%                        |
| FUTA                          | \$ 189.00                    |
| SUTA                          | \$ 189.00                    |
| Workers Comp & Payroll Costs  | 1.38%                        |
| 401K Contribution             | 2.00%                        |
| Health Insurance per Employee | \$ 4,380.00                  |
|                               | \$365 Per month per Employee |

|                                                  |         | High      | Yr1<br>75% | Low     | Yr2       | Yr3       | Yr4       | Yr5       |
|--------------------------------------------------|---------|-----------|------------|---------|-----------|-----------|-----------|-----------|
| <b>Instruction Staff</b>                         |         |           |            |         |           |           |           |           |
| Teachers (ESE or ESOL certified teacher)         | 39,500  | 22        | 17         | 11      | 28        | 33        | 34        | 34        |
| Substitute Teachers                              | 1,100   | 22        | 17         | 11      | 28        | 33        | 34        | 34        |
| Other Teachers (ESE, ESOL, see Budget Narrative) | 40,500  |           |            |         | 1         | 2         | 2         | 2         |
| Paraprofessionals                                | 18,000  | 3         | 1          |         | 2         | 2         | 2         | 2         |
| Supplements                                      | 593     | 22        | 17         | 11      | 28        | 33        | 34        | 34        |
|                                                  | 99,693  | 25        | 18         | 11      | 31        | 37        | 38        | 38        |
| <b>Pupil Personnel Services</b>                  |         |           |            |         |           |           |           |           |
| ESE Teacher/Coordinator                          | 42,000  | 1.00      | 1.00       | 0.50    | 1         | 1         | 1         | 1         |
| Nurse                                            | 35,000  |           |            |         |           |           |           |           |
|                                                  | 77,000  | 1.00      | 1.00       | 0.50    | 1         | 1         | 1         | 1         |
| <b>Media Services</b>                            |         |           |            |         |           |           |           |           |
| Media Specialist                                 | 41,000  |           |            |         | 1         | 1         | 1         | 1         |
|                                                  | 41,000  | -         | -          | -       | 1         | 1         | 1         | 1         |
| <b>School Administration</b>                     |         |           |            |         |           |           |           |           |
| Principal                                        | 85,000  | 1.00      | 1.00       | 1.00    | 1.00      | 1.00      | 1.00      | 1.00      |
| Assistant Principal                              | 65,000  |           |            |         |           | 1.00      | 1.00      | 1.00      |
| Administrative Assistant                         | 28,081  | 1.00      | 1.00       | 1.00    | 1.00      | 1.00      | 1.00      | 1.00      |
| Registrar                                        | 23,000  |           |            |         | 1.00      | 1.00      | 1.00      | 1.00      |
| Other Clerical                                   | 19,000  |           |            |         |           | 1.00      | 1.00      | 1.00      |
|                                                  | 220,081 | 2.00      | 2.00       | 2.00    | 3         | 5         | 5         | 5         |
| <b>Fiscal Services</b>                           |         |           |            |         |           |           |           |           |
| Business Manager                                 | 40,000  | 1.00      | 1.00       | 0.50    | 1         | 1         | 1         | 1         |
|                                                  | 40,000  | 1.00      | 1.00       | 0.50    | 1         | 1         | 1         | 1         |
| <b>Food Services</b>                             |         |           |            |         |           |           |           |           |
| Food Service Workers                             | 14,000  | 2         | 1          | 1       | 2         | 2         | 2         | 2         |
|                                                  | 14,000  | 2         | 1          | 1       | 2         | 2         | 2         | 2         |
|                                                  | -       | -         | -          | -       | -         | -         | -         | -         |
| <b>Operation of Plant</b>                        |         |           |            |         |           |           |           |           |
| Custodian                                        | 20,801  | 2.00      | 1.00       |         | 2         | 2         | 2         | 2         |
| Security                                         | 20,801  |           |            |         |           |           |           |           |
|                                                  | 41,602  | 2.00      | 1          | -       | 2         | 2         | 2         | 2         |
| <b>TOTAL EMPLOYEES</b>                           |         | 33        | 24         | 15      | 41        | 49        | 50        | 50        |
| <b>Average performance pay increase</b>          | 2.0%    |           |            |         |           |           |           |           |
| <b>Instruction Staff</b>                         |         |           |            |         |           |           |           |           |
| Homeroom Teachers                                |         | 869,000   | 671,500    | 434,500 | 1,128,120 | 1,356,161 | 1,425,202 | 1,453,706 |
| Substitute Teachers                              |         | 24,200    | 18,700     | 12,100  | 31,416    | 37,767    | 39,689    | 40,483    |
| Other Teachers (ESE, ESOL, Reading/Math Coaches) |         |           |            |         | 41,310    | 84,272    | 85,958    | 87,677    |
| Paraprofessionals                                |         | 54,000    | 18,000     | -       | 36,720    | 37,454    | 38,203    | 38,968    |
| Supplements                                      |         | 13,035    | 10,073     | 6,518   | 16,922    | 20,342    | 21,378    | 21,806    |
|                                                  |         | 960,235   | 718,273    | 453,118 | 1,254,488 | 1,535,997 | 1,610,431 | 1,642,640 |
| Benefits:                                        |         | 230,456   | 172,385    | 108,748 | 301,077   | 368,639   | 386,503   | 394,233   |
| <b>Pupil Personnel Services</b>                  |         |           |            |         |           |           |           |           |
| ESE Teacher/Coordinator                          |         | 42,000    | 42,000     | 21,000  | 42,840    | 43,697    | 44,571    | 45,462    |
| Nurse                                            |         | -         | -          | -       | -         | -         | -         | -         |
|                                                  |         | 42,000    | 42,000     | 21,000  | 42,840    | 43,697    | 44,571    | 45,462    |
| Benefits:                                        |         | 10,080    | 10,080     | 5,040   | 10,282    | 10,487    | 10,697    | 10,911    |
| <b>Media Services</b>                            |         |           |            |         |           |           |           |           |
| Media Specialist                                 |         | -         | -          | -       | 41,820    | 42,656    | 43,510    | 44,380    |
|                                                  |         | -         | -          | -       | 41,820    | 42,656    | 43,510    | 44,380    |
| Benefits:                                        |         | -         | -          | -       | 10,037    | 10,238    | 10,442    | 10,651    |
| <b>School Administration</b>                     |         |           |            |         |           |           |           |           |
| Principal                                        |         | 85,000    | 85,000     | 85,000  | 86,700    | 88,434    | 90,203    | 92,007    |
| Assistant Principal                              |         | -         | -          | -       | 67,626    | 68,979    | 70,358    | 71,758    |
| Administrative Assistant                         |         | 28,081    | 28,081     | 28,081  | 28,643    | 29,216    | 29,800    | 30,396    |
| Registrar                                        |         | -         | -          | -       | 23,460    | 23,929    | 24,408    | 24,896    |
| Other                                            |         | -         | -          | -       | -         | 19,768    | 20,163    | 20,566    |
|                                                  |         | 113,081   | 113,081    | 113,081 | 138,803   | 142,972   | 147,155   | 151,349   |
| Benefits:                                        |         | 27,139    | 27,139     | 27,139  | 33,313    | 34,563    | 35,813    | 37,063    |
| <b>Fiscal Services</b>                           |         |           |            |         |           |           |           |           |
| Business Manager                                 |         | 40,000    | 40,000     | 20,000  | 40,800    | 41,616    | 42,448    | 43,297    |
|                                                  |         | 40,000    | 40,000     | 20,000  | 40,800    | 41,616    | 42,448    | 43,297    |
| Benefits:                                        |         | 9,600     | 9,600      | 4,800   | 9,792     | 9,988     | 10,188    | 10,391    |
| <b>Food Services</b>                             |         |           |            |         |           |           |           |           |
| Food Service Workers                             |         | 28,000    | 14,000     | 14,000  | 28,560    | 29,131    | 29,714    | 30,308    |
|                                                  |         | 28,000    | 14,000     | 14,000  | 28,560    | 29,131    | 29,714    | 30,308    |
| Benefits:                                        |         | 6,720     | 3,360      | 3,360   | 6,854     | 6,991     | 7,131     | 7,274     |
| <b>Operation of Plant</b>                        |         |           |            |         |           |           |           |           |
| Custodian                                        |         | 41,602    | 20,801     | -       | 42,434    | 43,282    | 44,148    | 45,031    |
| Security                                         |         | -         | -          | -       | -         | -         | -         | -         |
|                                                  |         | 41,602    | 20,801     | -       | 42,434    | 43,282    | 44,148    | 45,031    |
| Benefits:                                        |         | 9,984     | 4,992      | -       | 10,184    | 10,388    | 10,596    | 10,807    |
| <b>Total Payroll &amp; Benefits</b>              |         | 1,518,898 | 1,175,711  | 770,286 | 1,971,283 | 2,437,037 | 2,539,983 | 2,590,782 |

## Somerset Parks Academy Charter School

**District: Broward**

ESE Percent 12.00%

ESOL Percent 11.00%

Free &amp; Reduced Lunch Percent 60.00%

Occupancy 100% 99% 99% 99% 99%

Homeroom Classrooms 395 515 625 648 648

|              | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|--------------|--------|--------|--------|--------|--------|
| Kindergarten | 6      | 6      | 6      | 6      | 6      |
| 1st Grade    | 6      | 6      | 6      | 6      | 6      |
| 2nd Grade    | 5      | 6      | 6      | 6      | 6      |
| 3rd Grade    | 5      | 6      | 6      | 6      | 6      |
| 4th Grade    |        | 4      | 5      | 5      | 5      |
| 5th Grade    |        |        | 4      | 5      | 5      |
| 6th Grade    |        |        |        |        |        |
| 7th Grade    |        |        |        |        |        |
| 8th Grade    |        |        |        |        |        |
| 9th Grade    |        |        |        |        |        |
| 10th Grade   |        |        |        |        |        |
| 11th Grade   |        |        |        |        |        |
| 12th Grade   |        |        |        |        |        |
|              | 22     | 28     | 33     | 34     | 34     |

## Student Teacher Ratio

|              | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|--------------|--------|--------|--------|--------|--------|
| Kindergarten | 18     | 18     | 18     | 18     | 18     |
| 1st Grade    | 18     | 18     | 18     | 18     | 18     |
| 2nd Grade    | 18     | 18     | 18     | 18     | 18     |
| 3rd Grade    | 18     | 18     | 18     | 18     | 18     |
| 4th Grade    | 0      | 22     | 22     | 22     | 22     |
| 5th Grade    | 0      | 0      | 22     | 22     | 22     |
| 6th Grade    | 0      | 0      | 0      | 0      | 0      |
| 7th Grade    | 0      | 0      | 0      | 0      | 0      |
| 8th Grade    | 0      | 0      | 0      | 0      | 0      |
| 9th Grade    | 0      | 0      | 0      | 0      | 0      |
| 10th Grade   | 0      | 0      | 0      | 0      | 0      |
| 11th Grade   | 0      | 0      | 0      | 0      | 0      |
| 12th Grade   | 0      | 0      | 0      | 0      | 0      |
|              | 0      | 396    | 520    | 630    | 652    |

## Students by Grade Budgeted Enrollment

|              | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|--------------|--------|--------|--------|--------|--------|
| Kindergarten | 108    | 107    | 107    | 107    | 107    |
| 1st Grade    | 108    | 107    | 107    | 107    | 107    |
| 2nd Grade    | 90     | 107    | 107    | 107    | 107    |
| 3rd Grade    | 90     | 107    | 107    | 107    | 107    |
| 4th Grade    | 0      | 87     | 109    | 109    | 109    |
| 5th Grade    | 0      | 0      | 87     | 109    | 109    |
| 6th Grade    | 0      | 0      | 0      | 0      | 0      |
| 7th Grade    | 0      | 0      | 0      | 0      | 0      |
| 8th Grade    | 0      | 0      | 0      | 0      | 0      |
| 9th Grade    | 0      | 0      | 0      | 0      | 0      |
| 10th Grade   | 0      | 0      | 0      | 0      | 0      |
| 11th Grade   | 0      | 0      | 0      | 0      | 0      |
| 12th Grade   | 0      | 0      | 0      | 0      | 0      |
|              | 395    | 515    | 625    | 648    | 648    |

| ESE Guaranteed Allocation:                                                                                                                                                                         | Grade Level | Matrix Level | FTE   |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--------------|-------|
| Additional Funding from the ESE Guaranteed Allocation.                                                                                                                                             | K-3         | 251          | 47    |
| Enter the FTE from 111, 112, & 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. The total should equal all FTE from programs 111, 112 & 113 above. | K-3         | 252          |       |
|                                                                                                                                                                                                    | K-3         | 253          |       |
|                                                                                                                                                                                                    | 4-8         | 251          | 0     |
|                                                                                                                                                                                                    | 4-8         | 252          |       |
|                                                                                                                                                                                                    | 4-8         | 253          |       |
|                                                                                                                                                                                                    | 9-12        | 251          | 0     |
|                                                                                                                                                                                                    | 9-12        | 252          |       |
|                                                                                                                                                                                                    | 9-12        | 253          |       |
| Total ESE                                                                                                                                                                                          |             |              | 47.00 |

## Somerset Parks Academy Charter School

|                                                                                                  | YEAR 1  |         |         |         |         |         |         |         |         |         |         |         |                 |
|--------------------------------------------------------------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------------|
|                                                                                                  | Jul     | Aug     | Sep     | Oct     | Nov     | Dec     | Jan     | Feb     | Mar     | Apr     | May     | Jun     |                 |
| REVENUES                                                                                         |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| State Sources with expected enrollment                                                           | 239,071 | 239,071 | 239,071 | 239,071 | 239,071 | 239,071 | 239,071 | 239,071 | 239,071 | 239,071 | 239,071 | 239,071 | \$ 2,868,857.00 |
| Federal Sources - NSLP funds 60% of students                                                     |         |         | 12,713  | 12,713  | 12,713  | 12,713  | 12,713  | 12,713  | 12,713  | 12,713  | 12,713  | 12,713  | \$ 127,126.80   |
| Local Sources - Lunch program paid students                                                      |         |         | 6,399   | 6,399   | 6,399   | 6,399   | 6,399   | 6,399   | 6,399   | 6,399   | 6,399   | 6,399   | \$ 63,990.00    |
| Capital Outlay (Available 1st Year - Advance/Ed Accredited)                                      |         |         |         | 8,119   | 8,119   | 8,119   | 8,119   | 8,119   | 8,119   | 8,119   | 8,119   | 8,119   | \$ 73,075.00    |
| Other Sources - Services                                                                         |         |         |         | 4,389   | 4,389   | 4,389   | 4,389   | 4,389   | 4,389   | 4,389   | 4,389   | 4,389   | \$ 39,500.00    |
|                                                                                                  | 239,071 | 239,071 | 258,183 | 270,691 | 270,691 | 270,691 | 270,691 | 270,691 | 270,691 | 270,691 | 270,691 | 270,691 | \$ 3,172,548.80 |
| EXPENDITURES                                                                                     |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| <b>Instruction</b>                                                                               |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| Salaries (includes classroom teachers, contract or hourly, and teacher aides)                    |         | 43,647  | 91,659  | 91,659  | 91,659  | 91,659  | 91,659  | 91,659  | 91,659  | 91,659  | 91,659  | 91,659  | \$ 960,235.00   |
| Fringe Benefits                                                                                  |         | 10,475  | 21,998  | 21,998  | 21,998  | 21,998  | 21,998  | 21,998  | 21,998  | 21,998  | 21,998  | 21,998  | \$ 230,456.40   |
| Contracted Professional Services (includes Therapists & other contracted instructional services) |         |         |         | 2,370   | 2,370   | 2,370   | 2,370   | 2,370   | 2,370   | 2,370   | 2,370   | 2,370   | \$ 21,330.00    |
| Classroom Supplies & Equipment                                                                   |         | 5,866   | 5,866   | 6,044   |         |         |         |         |         |         |         |         | \$ 17,775.00    |
| Teacher Supplies                                                                                 |         | 4,562   | 4,562   | 4,701   |         |         |         |         |         |         |         |         | \$ 13,825.00    |
| Textbooks and/or ebooks/Student Activities                                                       |         | 24,115  | 24,115  | 24,846  |         |         |         |         |         |         |         |         | \$ 73,075.00    |
| Supplemental instructional materials (CIRP/SIRP and Technology)                                  |         | 9,776   | 9,776   | 10,073  |         |         |         |         |         |         |         |         | \$ 29,625.00    |
| Digital Education Content Materials (Leased)                                                     |         |         |         |         |         |         |         |         |         |         |         | 59,250  | \$ 59,250.00    |
| Computer - Equipment for Instruction (leased)                                                    |         | 13,068  | 13,068  | 13,464  |         |         |         |         |         |         |         |         | \$ 39,600.00    |
| Computer Lab - Including Software                                                                |         | -       | -       | -       |         |         |         |         |         |         |         |         | \$ -            |
| Sub-Total Instruction                                                                            | -       | 111,509 | 171,044 | 175,153 | 116,027 | 116,027 | 116,027 | 116,027 | 116,027 | 116,027 | 116,027 | 175,277 | \$ 1,445,171.40 |
| <b>Pupil Personnel Services</b>                                                                  |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| Salaries (includes counselor, school nurse, health assistant)                                    |         |         | 4,200   | 4,200   | 4,200   | 4,200   | 4,200   | 4,200   | 4,200   | 4,200   | 4,200   | 4,200   | \$ 42,000.00    |
| Fringe Benefits                                                                                  |         |         | 1,008   | 1,008   | 1,008   | 1,008   | 1,008   | 1,008   | 1,008   | 1,008   | 1,008   | 1,008   | \$ 10,080.00    |
| Contracted Professional Services (counseling and psychological)                                  |         |         | 4,029   | 4,029   | 4,029   | 4,029   | 4,029   | 4,029   | 4,029   | 4,029   | 4,029   | 4,029   | \$ 40,290.00    |
| Sub-Total Pupil Personnel Services                                                               | -       | -       | 9,237   | 9,237   | 9,237   | 9,237   | 9,237   | 9,237   | 9,237   | 9,237   | 9,237   | 9,237   | \$ 92,370.00    |
| <b>Media Services</b>                                                                            |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| Salaries (includes Librarian)                                                                    |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| Fringe Benefits                                                                                  |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| Library Books                                                                                    |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| Audio Visual Materials                                                                           |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| Sub-Total Media Services                                                                         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| <b>Curriculum Development</b>                                                                    |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| Salaries (includes Curriculum Specialist)                                                        |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| Fringe Benefits                                                                                  |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)                    | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | \$ 45,425.00    |
| Development Supplies                                                                             |         | 2,963   | -       |         |         |         |         |         |         |         |         |         | \$ -            |
| Student Activities                                                                               |         |         | 2,963   |         |         |         |         |         |         |         |         |         | \$ 5,925.00     |
| Sub-Total Curriculum Development                                                                 | 3,785   | 6,748   | 6,748   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | 3,785   | \$ 51,350.00    |
| <b>Staff Development</b>                                                                         |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| Workshops/Trainings                                                                              |         | 12,500  |         |         |         |         |         |         | 12,500  |         |         |         | \$ 25,000.00    |
| Travel                                                                                           |         | -       |         |         |         |         |         |         | -       |         |         |         | \$ -            |
| Professional Services                                                                            |         | -       |         |         |         |         |         |         | -       |         |         |         | \$ -            |
| Sub-Total Staff Development                                                                      | -       | 12,500  | -       | -       | -       | -       | -       | -       | 12,500  | -       | -       | -       | \$ 25,000.00    |
| <b>Instruction Related Technology</b>                                                            |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| Salaries (includes Technology Personnel)                                                         |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| Fringe Benefits                                                                                  |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -            |
| Software and Scanner                                                                             |         | 600     | 600     |         |         |         |         |         |         |         |         |         | \$ 1,200.00     |
| Hardware Maintenance                                                                             |         |         |         | 978     | 978     | 978     | 978     | 978     | 978     | 978     | 978     | 978     | \$ 8,800.00     |
| Computer Learning Labs                                                                           |         | -       | -       |         |         |         |         |         |         |         |         |         | \$ -            |
| Sub-Total Instruction Related Technology                                                         | -       | 600     | 600     | 978     | 978     | 978     | 978     | 978     | 978     | 978     | 978     | 978     | \$ 10,000.00    |
| <b>Board</b>                                                                                     |         |         |         |         |         |         |         |         |         |         |         |         |                 |
| Professional Services (Legal)                                                                    |         |         |         |         |         | 625     | 625     | 625     | 625     |         |         |         | \$ 2,500.00     |

## Somerset Parks Academy Charter School

|                                                                            | YEAR 1        |               |               |               |               |               |               |               |               |               |               |               |                      |
|----------------------------------------------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------------|
| Insurance (General Liability, D&O, Professional Liability)                 | 5,088         |               |               | 5,088         |               |               | 5,088         |               |               | 5,088         |               |               | \$ 20,350.00         |
| Travel                                                                     | 2,000         |               |               |               |               |               |               |               |               |               |               |               | \$ 2,000.00          |
| <i>Sub-Total Board</i>                                                     | <i>7,088</i>  | <i>-</i>      | <i>-</i>      | <i>5,088</i>  | <i>-</i>      | <i>625</i>    | <i>5,713</i>  | <i>625</i>    | <i>625</i>    | <i>5,088</i>  | <i>-</i>      | <i>-</i>      | <i>\$ 24,850.00</i>  |
| <b>General Administration</b>                                              |               |               |               |               |               |               |               |               |               |               |               |               |                      |
| Management Fees (Portion of the \$450 fee charged by ESP)                  |               |               |               |               |               |               |               |               |               |               |               | 88,875        | \$ 88,875.00         |
| Administrative Fee                                                         | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| <i>Sub-Total General Administration</i>                                    | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>-</i>      | <i>88,875</i> | <i>\$ 88,875.00</i>  |
| <b>School Administration</b>                                               |               |               |               |               |               |               |               |               |               |               |               |               |                      |
| Salaries (includes Principal, Secretary & other Office Personnel)          | 9,423         | 9,423         | 9,423         | 9,423         | 9,423         | 9,423         | 9,423         | 9,423         | 9,423         | 9,423         | 9,423         | 9,423         | \$ 113,081.08        |
| Fringe Benefits                                                            | 2,262         | 2,262         | 2,262         | 2,262         | 2,262         | 2,262         | 2,262         | 2,262         | 2,262         | 2,262         | 2,262         | 2,262         | \$ 27,139.46         |
| Equipment Rental / Lease                                                   | 300           | 300           | 300           | 300           | 300           | 300           | 300           | 300           | 300           | 300           | 300           | 300           | \$ 3,600.00          |
| Travel                                                                     |               |               |               | 2,400         |               |               |               |               |               |               |               |               | \$ 2,400.00          |
| Advertising and Promotion                                                  | 658           | 658           |               |               |               |               |               |               | 658           |               |               |               | \$ 1,975.00          |
| License Fees                                                               | 200           |               |               |               |               |               |               |               |               |               |               |               | \$ 200.00            |
| Dues and Subscriptions                                                     | 1,580         |               |               |               |               |               |               |               |               |               |               |               | \$ 1,580.00          |
| Postage                                                                    |               |               | 110           | 110           | 110           | 110           | 110           | 110           | 110           | 110           | 110           | 110           | \$ 1,100.00          |
| Printing                                                                   | 2,475         | 225           | 225           | 225           | 225           | 225           | 225           | 225           | 225           | 225           | 225           | 225           | \$ 4,950.00          |
| Office Supplies                                                            | 2,469         | 673           | 673           | 673           | 673           | 673           | 673           | 673           | 673           | 673           | 673           | 673           | \$ 9,875.00          |
| Office Equipment                                                           | 1,500         |               |               |               |               |               |               |               |               |               |               |               | \$ 1,500.00          |
| Computer Equipment                                                         | 2,000         |               |               |               |               |               |               |               |               |               |               |               | \$ 2,000.00          |
| <i>Sub-Total School Administration</i>                                     | <i>22,867</i> | <i>13,542</i> | <i>12,993</i> | <i>15,393</i> | <i>12,993</i> | <i>12,993</i> | <i>12,993</i> | <i>12,993</i> | <i>13,652</i> | <i>12,993</i> | <i>12,993</i> | <i>12,993</i> | <i>\$ 169,400.54</i> |
| <b>Facilities Acquisition &amp; Construction</b>                           |               |               |               |               |               |               |               |               |               |               |               |               |                      |
| Building Lease / Rent (see budget summary for calculation)                 |               | 32,318        | 32,318        | 32,318        | 32,318        | 32,318        | 32,318        | 32,318        | 32,318        | 32,318        | 32,318        | 32,318        | \$ 355,500.00        |
| Remodeling & Renovations                                                   | -             |               |               |               |               |               |               |               |               |               |               |               | \$ -                 |
| Purchase of Buildings & Fixed Equipment                                    | -             |               |               |               |               |               |               |               |               |               |               |               | \$ -                 |
| Land                                                                       | -             |               |               |               |               |               |               |               |               |               |               |               | \$ -                 |
| <i>Sub-Total Facilities Acquisition &amp; Construction</i>                 | <i>-</i>      | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>32,318</i> | <i>\$ 355,500.00</i> |
| <b>Fiscal Services</b>                                                     |               |               |               |               |               |               |               |               |               |               |               |               |                      |
| Salaries (Business Manager, Accounting & Bookkeeping Personnel)            | 3,333         | 3,333         | 3,333         | 3,333         | 3,333         | 3,333         | 3,333         | 3,333         | 3,333         | 3,333         | 3,333         | 3,333         | \$ 40,000.00         |
| Fringe Benefits                                                            | 800           | 800           | 800           | 800           | 800           | 800           | 800           | 800           | 800           | 800           | 800           | 800           | \$ 9,600.00          |
| Fee to County School Board - up to 250 students                            | 7,566         | 7,566         | 7,566         | 7,566         | 7,566         | 7,566         | 7,566         | 7,566         | 7,566         | 7,566         | 7,566         | 7,566         | \$ 90,786.61         |
| Planning, Research, Development and Evaluation (Part of ESP's Fee)         | 3,621         | 3,621         | 3,621         | 3,621         | 3,621         | 3,621         | 3,621         | 3,621         | 3,621         | 3,621         | 3,621         | 3,621         | \$ 43,450.00         |
| Professional Services - Annual Audit                                       | 708           | 708           | 708           | 708           | 708           | 708           | 708           | 708           | 708           | 708           | 708           | 708           | \$ 8,500.00          |
| <i>Sub-Total Fiscal Services</i>                                           | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>16,028</i> | <i>\$ 192,336.61</i> |
| <b>Food Services</b>                                                       |               |               |               |               |               |               |               |               |               |               |               |               |                      |
| Salaries (Food Service Workers)                                            |               |               | 2,800         | 2,800         | 2,800         | 2,800         | 2,800         | 2,800         | 2,800         | 2,800         | 2,800         | 2,800         | \$ 28,000.00         |
| Fringe Benefits                                                            |               |               | 672           | 672           | 672           | 672           | 672           | 672           | 672           | 672           | 672           | 672           | \$ 6,720.00          |
| Food                                                                       |               |               | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| Food, Materials & Supplies - Vendor provided meals 90% Participation       |               |               | 15,742        | 15,742        | 15,742        | 15,742        | 15,742        | 15,742        | 15,742        | 15,742        | 15,742        | 15,742        | \$ 157,415.40        |
| Equipment Rental / Lease (provided by food vendor)                         |               |               | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| Inspection fees                                                            |               |               | 15            | 15            | 15            | 15            | 15            | 15            | 15            | 15            | 15            | 15            | \$ 150.00            |
| <i>Sub-Total Food Services</i>                                             | <i>-</i>      | <i>-</i>      | <i>19,229</i> | <i>19,229</i> | <i>19,229</i> | <i>19,229</i> | <i>19,229</i> | <i>19,229</i> | <i>19,229</i> | <i>19,229</i> | <i>19,229</i> | <i>19,229</i> | <i>\$ 192,285.40</i> |
| <b>Pupil Transportation Services</b>                                       |               |               |               |               |               |               |               |               |               |               |               |               |                      |
| Salaries (Drivers & Transportation workers)                                |               |               | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| Fringe Benefits                                                            |               |               | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| Contracted Transportation Services - \$235 per bus per day 20% utilization |               |               | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | \$ 104,400.00        |
| Field Trip Expenses for competitions                                       |               |               | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| Buses                                                                      |               |               | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| Repairs & Maintenance                                                      |               |               | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| Fuel                                                                       |               |               | -             | -             | -             | -             | -             | -             | -             | -             | -             | -             | \$ -                 |
| <i>Sub-Total Pupil Transportation Services</i>                             | <i>-</i>      | <i>-</i>      | <i>10,440</i> | <i>10,440</i> | <i>10,440</i> | <i>10,440</i> | <i>10,440</i> | <i>10,440</i> | <i>10,440</i> | <i>10,440</i> | <i>10,440</i> | <i>10,440</i> | <i>\$ 104,400.00</i> |
| <b>Operation of Plant</b>                                                  |               |               |               |               |               |               |               |               |               |               |               |               |                      |
| Salaries (Custodian, crossing guards, security)                            | 3,467         | 3,467         | 3,467         | 3,467         | 3,467         | 3,467         | 3,467         | 3,467         | 3,467         | 3,467         | 3,467         | 3,467         | \$ 41,601.60         |
| Fringe benefits                                                            | 832           | 832           | 832           | 832           | 832           | 832           | 832           | 832           | 832           | 832           | 832           | 832           | \$ 9,984.38          |
| Purchased Service (Custodial, fire and alarm, etc)                         | 4,583         | 4,583         | 4,583         | 4,583         | 4,583         | 4,583         | 4,583         | 4,583         | 4,583         | 4,583         | 4,583         | 4,583         | \$ 55,000.00         |

## Somerset Parks Academy Charter School

|                                                                          |               |               |                |                |               |               |               |               |               |               |               |                 | YEAR 1          |
|--------------------------------------------------------------------------|---------------|---------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|-----------------|
| Lawn Maintenance                                                         | 367           | 367           | 367            | 367            | 367           | 367           | 367           | 367           | 367           | 367           | 367           | 367             | \$ 4,400.00     |
| Pest Control                                                             | 73            | 73            | 73             | 73             | 73            | 73            | 73            | 73            | 73            | 73            | 73            | 73              | \$ 880.00       |
| Security Services                                                        | 300           | 300           | 300            | 300            | 300           | 300           | 300           | 300           | 300           | 300           | 300           | 300             | \$ 3,600.00     |
| Property Insurance                                                       | 4,400         | 4,400         | 4,400          | 4,400          | 4,400         | 4,400         | 4,400         | 4,400         | 4,400         | 4,400         | 4,400         | 4,400           | \$ 52,800.00    |
| Telephone Services                                                       | 300           | 300           | 300            | 300            | 300           | 300           | 300           | 300           | 300           | 300           | 300           | 300             | \$ 3,600.00     |
| Water & Sewer                                                            | 147           | 147           | 147            | 147            | 147           | 147           | 147           | 147           | 147           | 147           | 147           | 147             | \$ 1,760.00     |
| Electricity                                                              | 4,767         | 4,767         | 4,767          | 4,767          | 4,767         | 4,767         | 4,767         | 4,767         | 4,767         | 4,767         | 4,767         | 4,767           | \$ 57,200.00    |
| Custodial Supplies & Equipment                                           | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <i>Sub-Total Operation of Plant</i>                                      | 19,235        | 19,235        | 19,235         | 19,235         | 19,235        | 19,235        | 19,235        | 19,235        | 19,235        | 19,235        | 19,235        | 19,235          | \$ 230,825.98   |
| <b>Maintenance of Plant</b>                                              |               |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Repairs & Maintenance                                                    |               | 2,963         | 2,963          | 2,963          | 2,963         | 2,963         | 2,963         | 2,963         | 2,963         | 2,963         | 2,963         | 2,963           | \$ 32,587.50    |
| Supplies                                                                 | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <i>Sub-Total Maintenance of Plant</i>                                    | -             | 2,963         | 2,963          | 2,963          | 2,963         | 2,963         | 2,963         | 2,963         | 2,963         | 2,963         | 2,963         | 2,963           | \$ 32,587.50    |
| <b>Administrative Technology Services</b>                                |               |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Internal Technology Support                                              | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Technology Personnel                                                     | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Systems Operation                                                        | 1,375         | 1,375         | 1,375          | 1,375          | 1,375         | 1,375         | 1,375         | 1,375         | 1,375         | 1,375         | 1,375         | 1,375           | \$ 16,500.00    |
| Systems Planning & Analysis                                              | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <i>Sub-Total Administrative Technology Services</i>                      | 1,375         | 1,375         | 1,375          | 1,375          | 1,375         | 1,375         | 1,375         | 1,375         | 1,375         | 1,375         | 1,375         | 1,375           | \$ 16,500.00    |
| <b>After Care Programs</b>                                               |               |               |                |                |               |               |               |               |               |               |               |                 |                 |
| After Care Salary                                                        |               |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Fringe Benefits                                                          |               |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <i>Sub-Total After Care Programs</i>                                     |               |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Debt Service</b>                                                      |               |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Redemption of Principal                                                  |               |               |                |                |               |               |               |               |               |               |               | -               | \$ -            |
| Interest (Interest Only at 6%)                                           |               | 136           | 136            | 136            | 136           | 136           | 136           | 136           | 136           | 136           | 136           | 136             | \$ 1,500.00     |
| <i>Sub-Total Debt Service</i>                                            |               | 136           | 136            | 136            | 136           | 136           | 136           | 136           | 136           | 136           | 136           | 136             | \$ 1,500.00     |
| <b>Contingency</b>                                                       |               |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Operating expense contingency - 3% of FEFP - Considered restricted funds |               |               |                |                |               |               |               |               |               |               |               | 95,176          | \$ 95,176.46    |
| <i>Sub-Total Contingency</i>                                             |               |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ 95,176.46    |
| <b>Total Expenditures</b>                                                | \$ 70,378.59  | \$ 216,954.52 | \$ 302,346.30  | \$ 311,358.08  | \$ 244,744.58 | \$ 245,369.58 | \$ 250,457.08 | \$ 245,369.58 | \$ 258,527.91 | \$ 249,832.08 | \$ 244,744.58 | \$ 488,046.04   | \$ 3,128,128.90 |
| <b>Excess of Revenues over Expenditures</b>                              | \$ 168,692.82 | \$ 22,116.89  | \$ (44,163.20) | \$ (40,666.65) | \$ 25,946.85  | \$ 25,321.85  | \$ 20,234.35  | \$ 25,321.85  | \$ 12,163.52  | \$ 20,859.35  | \$ 25,946.85  | \$ (217,354.61) | \$ 44,419.90    |
| <b>Fund Balance</b>                                                      | \$ 168,692.82 | \$ 190,809.72 | \$ 146,646.51  | \$ 105,979.87  | \$ 131,926.72 | \$ 157,248.58 | \$ 177,482.93 | \$ 202,804.78 | \$ 214,968.30 | \$ 235,827.66 | \$ 261,774.51 | \$ 44,419.90    |                 |

## Somerset Parks Academy Charter School

|                                                                                                  |                |                |                |                |                |                |                |                |                |                |                |                | YEAR 2           |
|--------------------------------------------------------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|
|                                                                                                  |                |                |                |                |                |                |                |                |                |                |                |                | 100 % Enrollment |
|                                                                                                  | Jul            | Aug            | Sep            | Oct            | Nov            | Dec            | Jan            | Feb            | Mar            | Apr            | May            | Jun            |                  |
| <b>REVENUES</b>                                                                                  |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| State Sources with expected enrollment                                                           | 310,238        | 310,238        | 310,238        | 310,238        | 310,238        | 310,238        | 310,238        | 310,238        | 310,238        | 310,238        | 310,238        | 310,238        | \$ 3,722,852.16  |
| Federal Sources - NSLP funds 60% of students                                                     |                |                | 16,906         | 16,906         | 16,906         | 16,906         | 16,906         | 16,906         | 16,906         | 16,906         | 16,906         | 16,906         | \$ 169,062.55    |
| Local Sources - Lunch program paid students                                                      |                |                | 8,510          | 8,510          | 8,510          | 8,510          | 8,510          | 8,510          | 8,510          | 8,510          | 8,510          | 8,510          | \$ 85,098.60     |
| Capital Outlay (Available 1st Year - Advance/Ed Accredited)                                      |                |                |                | 10,586         | 10,586         | 10,586         | 10,586         | 10,586         | 10,586         | 10,586         | 10,586         | 10,586         | \$ 95,275.00     |
| Other Sources - Services                                                                         |                |                |                | 5,722          | 5,722          | 5,722          | 5,722          | 5,722          | 5,722          | 5,722          | 5,722          | 5,722          | \$ 51,500.00     |
| Previous Years Balance Carry Forward                                                             | 44,420         |                |                |                |                |                |                |                |                |                |                |                | \$ 44,419.90     |
|                                                                                                  | <b>354,658</b> | <b>310,238</b> | <b>335,654</b> | <b>351,962</b> | <b>351,962</b> | <b>351,962</b> | <b>351,962</b> | <b>351,962</b> | <b>351,962</b> | <b>351,962</b> | <b>351,962</b> | <b>351,962</b> | \$ 4,168,208.21  |
| <b>EXPENDITURES</b>                                                                              |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| <b>Instruction</b>                                                                               |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| Salaries (includes classroom teachers, contract or hourly, and teacher aides)                    |                | 57,022         | 119,747        | 119,747        | 119,747        | 119,747        | 119,747        | 119,747        | 119,747        | 119,747        | 119,747        | 119,747        | \$ 1,254,487.80  |
| Fringe Benefits                                                                                  |                | 13,685         | 28,739         | 28,739         | 28,739         | 28,739         | 28,739         | 28,739         | 28,739         | 28,739         | 28,739         | 28,739         | \$ 301,077.07    |
| Contracted Professional Services (includes Therapists & other contracted instructional services) |                |                |                | 3,152          | 3,152          | 3,152          | 3,152          | 3,152          | 3,152          | 3,152          | 3,152          | 3,152          | \$ 28,366.20     |
| Classroom Supplies & Equipment                                                                   |                | 7,801          | 7,801          | 8,037          |                |                |                |                |                |                |                |                | \$ 23,638.50     |
| Teacher Supplies                                                                                 |                | 6,067          | 6,067          | 6,251          |                |                |                |                |                |                |                |                | \$ 18,385.50     |
| Textbooks and/or ebooks/Student Activities                                                       |                | 32,070         | 32,070         | 33,041         |                |                |                |                |                |                |                |                | \$ 97,180.50     |
| Supplemental instructional materials (CIRP/SIRP and Technology)                                  |                | 13,001         | 13,001         | 13,395         |                |                |                |                |                |                |                |                | \$ 39,397.50     |
| Digital Education Content Materials (Leased)                                                     |                |                |                |                |                |                |                |                |                |                |                | 78,795         | \$ 78,795.00     |
| Computer - Equipment for Instruction (leased)                                                    |                | 16,965         | 16,965         | 17,479         |                |                |                |                |                |                |                |                | \$ 51,408.00     |
| Computer Lab - Including Software                                                                |                |                |                |                |                |                |                |                |                |                |                |                | \$ -             |
| Sub-Total Instruction                                                                            | -              | 146,611        | 224,389        | 229,841        | 151,638        | 151,638        | 151,638        | 151,638        | 151,638        | 151,638        | 151,638        | 230,433        | \$ 1,892,736.07  |
| <b>Pupil Personnel Services</b>                                                                  |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| Salaries (includes counselor, school nurse, health assistant)                                    |                |                | 4,284          | 4,284          | 4,284          | 4,284          | 4,284          | 4,284          | 4,284          | 4,284          | 4,284          | 4,284          | \$ 42,840.00     |
| Fringe Benefits                                                                                  |                |                | 1,028          | 1,028          | 1,028          | 1,028          | 1,028          | 1,028          | 1,028          | 1,028          | 1,028          | 1,028          | \$ 10,281.60     |
| Contracted Professional Services (counseling and psychological)                                  |                |                | 5,358          | 5,358          | 5,358          | 5,358          | 5,358          | 5,358          | 5,358          | 5,358          | 5,358          | 5,358          | \$ 53,580.60     |
| Sub-Total Pupil Personnel Services                                                               | -              | -              | 10,670         | 10,670         | 10,670         | 10,670         | 10,670         | 10,670         | 10,670         | 10,670         | 10,670         | 10,670         | \$ 106,702.20    |
| <b>Media Services</b>                                                                            |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| Salaries (includes Librarian)                                                                    |                | 1,901          | 3,992          | 3,992          | 3,992          | 3,992          | 3,992          | 3,992          | 3,992          | 3,992          | 3,992          | 3,992          | \$ 41,820.00     |
| Fringe Benefits                                                                                  |                | 456            | 958            | 958            | 958            | 958            | 958            | 958            | 958            | 958            | 958            | 958            | \$ 10,036.80     |
| Library Books                                                                                    |                | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | \$ -             |
| Audio Visual Materials                                                                           |                | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | \$ -             |
| Sub-Total Media Services                                                                         | -              | 2,357          | 4,950          | 4,950          | 4,950          | 4,950          | 4,950          | 4,950          | 4,950          | 4,950          | 4,950          | 4,950          | \$ 51,856.80     |
| <b>Curriculum Development</b>                                                                    |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| Salaries (includes Curriculum Specialist)                                                        |                | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | \$ -             |
| Fringe Benefits                                                                                  |                | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | \$ -             |
| Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)                    | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | \$ 60,409.50     |
| Development Supplies                                                                             |                | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | \$ -             |
| Student Activities                                                                               |                | 3,940          | 3,940          |                |                |                |                |                |                |                |                |                | \$ 7,879.50      |
| Sub-Total Curriculum Development                                                                 | 5,034          | 8,974          | 8,974          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | 5,034          | \$ 68,289.00     |
| <b>Staff Development</b>                                                                         |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| Workshops/Trainings                                                                              |                | 15,500         |                |                |                |                |                |                | 15,500         |                |                |                | \$ 31,000.00     |
| Travel                                                                                           |                | -              |                |                |                |                |                |                | -              |                |                |                | \$ -             |
| Professional Services                                                                            |                | -              |                |                |                |                |                |                | -              |                |                |                | \$ -             |
| Sub-Total Staff Development                                                                      | -              | 15,500         | -              | -              | -              | -              | -              | -              | 15,500         | -              | -              | -              | \$ 31,000.00     |
| <b>Instruction Related Technology</b>                                                            |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| Salaries (includes Technology Personnel)                                                         |                | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | \$ -             |
| Fringe Benefits                                                                                  |                | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | -              | \$ -             |
| Software and Scanner                                                                             |                | 612            | 612            |                |                |                |                |                |                |                |                |                | \$ 1,224.00      |
| Hardware Maintenance                                                                             |                |                |                | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | \$ 11,424.00     |
| Computer Learning Labs                                                                           |                | -              | -              |                |                |                |                |                |                |                |                |                | \$ -             |
| Sub-Total Instruction Related Technology                                                         | -              | 612            | 612            | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | 1,269          | \$ 12,648.00     |
| <b>Board</b>                                                                                     |                |                |                |                |                |                |                |                |                |                |                |                |                  |
| Professional Services (Legal)                                                                    | 2,550          |                |                |                |                |                |                |                |                |                |                |                | \$ 2,550.00      |



**Somerset Parks Academy Charter School**

|                                                                            |        |        |        |        |        |        |        |        |        |        |        |        | YEAR 2           |
|----------------------------------------------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|------------------|
|                                                                            |        |        |        |        |        |        |        |        |        |        |        |        | 100 % Enrollment |
| Insurance (General Liability, D&O, Professional Liability)                 | 6,605  |        |        | 6,605  |        |        | 6,605  |        |        | 6,605  |        |        | \$ 26,418.00     |
| Travel                                                                     | 2,040  |        |        |        |        |        |        |        |        |        |        |        | \$ 2,040.00      |
| Sub-Total Board                                                            | 11,195 | -      | -      | 6,605  | -      | -      | 6,605  | -      | -      | 6,605  | -      | -      | \$ 31,008.00     |
| <b>General Administration</b>                                              |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Management Fees (Portion of the \$450 fee charged by ESP)                  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | \$ 118,192.50    |
| Administrative Fee                                                         | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Sub-Total General Administration                                           | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | 9,849  | \$ 118,192.50    |
| <b>School Administration</b>                                               |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (includes Principal, Secretary & other Office Personnel)          | 11,567 | 11,567 | 11,567 | 11,567 | 11,567 | 11,567 | 11,567 | 11,567 | 11,567 | 11,567 | 11,567 | 11,567 | \$ 138,802.70    |
| Fringe Benefits                                                            | 2,776  | 2,776  | 2,776  | 2,776  | 2,776  | 2,776  | 2,776  | 2,776  | 2,776  | 2,776  | 2,776  | 2,776  | \$ 33,312.65     |
| Equipment Rental / Lease                                                   | 306    | 306    | 306    | 306    | 306    | 306    | 306    | 306    | 306    | 306    | 306    | 306    | \$ 3,672.00      |
| Travel                                                                     |        |        |        | 2,448  |        |        |        |        |        |        |        |        | \$ 2,448.00      |
| Advertising and Promotion                                                  | 876    | 876    | 876    |        |        |        |        |        |        |        |        |        | \$ 2,628.50      |
| License Fees                                                               | 204    |        |        |        |        |        |        |        |        |        |        |        | \$ 204.00        |
| Dues and Subscriptions                                                     | 2,101  |        |        |        |        |        |        |        |        |        |        |        | \$ 2,101.20      |
| Postage                                                                    |        |        | 143    | 143    | 143    | 143    | 143    | 143    | 143    | 143    | 143    | 143    | \$ 1,428.00      |
| Printing                                                                   | 3,213  | 292    | 292    | 292    | 292    | 292    | 292    | 292    | 292    | 292    | 292    | 292    | \$ 6,426.00      |
| Office Supplies                                                            | 3,219  | 878    | 878    | 878    | 878    | 878    | 878    | 878    | 878    | 878    | 878    | 878    | \$ 12,875.00     |
| Office Equipment                                                           | 1,530  |        |        |        |        |        |        |        |        |        |        |        | \$ 1,530.00      |
| Computer Equipment                                                         | 2,040  |        |        |        |        |        |        |        |        |        |        |        | \$ 2,040.00      |
| Sub-Total School Administration                                            | 27,831 | 16,694 | 16,837 | 18,410 | 15,962 | 15,962 | 15,962 | 15,962 | 15,962 | 15,962 | 15,962 | 15,962 | \$ 207,466.05    |
| <b>Facilities Acquisition &amp; Construction</b>                           |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Building Lease / Rent (see budget summary for calculation)                 |        | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | \$ 477,405.00    |
| Remodeling & Renovations                                                   | -      |        |        |        |        |        |        |        |        |        |        |        | \$ -             |
| Purchase of Buildings & Fixed Equipment                                    | -      |        |        |        |        |        |        |        |        |        |        |        | \$ -             |
| Land                                                                       | -      |        |        |        |        |        |        |        |        |        |        |        | \$ -             |
| Sub-Total Facilities Acquisition & Construction                            | -      | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | 43,400 | \$ 477,405.00    |
| <b>Fiscal Services</b>                                                     |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Business Manager, Accounting & Bookkeeping Personnel)            | 3,400  | 3,400  | 3,400  | 3,400  | 3,400  | 3,400  | 3,400  | 3,400  | 3,400  | 3,400  | 3,400  | 3,400  | \$ 40,800.00     |
| Fringe Benefits                                                            | 816    | 816    | 816    | 816    | 816    | 816    | 816    | 816    | 816    | 816    | 816    | 816    | \$ 9,792.00      |
| Fee to County School Board - up to 250 students                            | 7,458  | 7,458  | 7,458  | 7,458  | 7,458  | 7,458  | 7,458  | 7,458  | 7,458  | 7,458  | 7,458  | 7,458  | \$ 89,491.64     |
| Planning, Research, Development and Evaluation (Part of ESP's Fee)         | 4,815  | 4,815  | 4,815  | 4,815  | 4,815  | 4,815  | 4,815  | 4,815  | 4,815  | 4,815  | 4,815  | 4,815  | \$ 57,783.00     |
| Professional Services - Annual Audit                                       | 723    | 723    | 723    | 723    | 723    | 723    | 723    | 723    | 723    | 723    | 723    | 723    | \$ 8,670.00      |
| Sub-Total Fiscal Services                                                  | 17,211 | 17,211 | 17,211 | 17,211 | 17,211 | 17,211 | 17,211 | 17,211 | 17,211 | 17,211 | 17,211 | 17,211 | \$ 206,536.64    |
| <b>Food Services</b>                                                       |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Food Service Workers)                                            |        |        | 2,856  | 2,856  | 2,856  | 2,856  | 2,856  | 2,856  | 2,856  | 2,856  | 2,856  | 2,856  | \$ 28,560.00     |
| Fringe Benefits                                                            |        |        | 685    | 685    | 685    | 685    | 685    | 685    | 685    | 685    | 685    | 685    | \$ 6,854.40      |
| Food                                                                       |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Food, Materials & Supplies - Vendor provided meals 90% Participation       |        |        | 20,934 | 20,934 | 20,934 | 20,934 | 20,934 | 20,934 | 20,934 | 20,934 | 20,934 | 20,934 | \$ 209,342.56    |
| Equipment Rental / Lease (provided by food vendor)                         |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Inspection fees                                                            |        |        | 15     | 15     | 15     | 15     | 15     | 15     | 15     | 15     | 15     | 15     | \$ 153.00        |
| Sub-Total Food Services                                                    | -      | -      | 24,491 | 24,491 | 24,491 | 24,491 | 24,491 | 24,491 | 24,491 | 24,491 | 24,491 | 24,491 | \$ 244,909.96    |
| <b>Pupil Transportation Services</b>                                       |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Drivers & Transportation workers)                                |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Fringe Benefits                                                            |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Contracted Transportation Services - \$235 per bus per day 20% utilization |        |        | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | \$ 104,400.00    |
| Field Trip Expenses for competitions                                       |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Buses                                                                      |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Repairs & Maintenance                                                      |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Fuel                                                                       |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Sub-Total Pupil Transportation Services                                    | -      | -      | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | \$ 104,400.00    |
| <b>Operation of Plant</b>                                                  |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Custodian, crossing guards, security)                            | 3,536  | 3,536  | 3,536  | 3,536  | 3,536  | 3,536  | 3,536  | 3,536  | 3,536  | 3,536  | 3,536  | 3,536  | \$ 42,433.63     |
| Fringe benefits                                                            | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | \$ 10,184.07     |
| Purchased Service (Custodial, fire and alarm, etc)                         | 5,950  | 5,950  | 5,950  | 5,950  | 5,950  | 5,950  | 5,950  | 5,950  | 5,950  | 5,950  | 5,950  | 5,950  | \$ 71,400.00     |
| Lawn Maintenance                                                           | 476    | 476    | 476    | 476    | 476    | 476    | 476    | 476    | 476    | 476    | 476    | 476    | \$ 5,712.00      |

## Somerset Parks Academy Charter School

|                                                                          |               |               |                |                |               |               |               |               |               |               |               |                 | YEAR 2           |
|--------------------------------------------------------------------------|---------------|---------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|------------------|
|                                                                          |               |               |                |                |               |               |               |               |               |               |               |                 | 100 % Enrollment |
| Pest Control                                                             | 95            | 95            | 95             | 95             | 95            | 95            | 95            | 95            | 95            | 95            | 95            | 95              | \$ 1,142.40      |
| Security Services                                                        | 306           | 306           | 306            | 306            | 306           | 306           | 306           | 306           | 306           | 306           | 306           | 306             | \$ 3,672.00      |
| Property Insurance                                                       | 5,712         | 5,712         | 5,712          | 5,712          | 5,712         | 5,712         | 5,712         | 5,712         | 5,712         | 5,712         | 5,712         | 5,712           | \$ 68,544.00     |
| Telephone Services                                                       | 306           | 306           | 306            | 306            | 306           | 306           | 306           | 306           | 306           | 306           | 306           | 306             | \$ 3,672.00      |
| Water & Sewer                                                            | 190           | 190           | 190            | 190            | 190           | 190           | 190           | 190           | 190           | 190           | 190           | 190             | \$ 2,284.80      |
| Electricity                                                              | 6,188         | 6,188         | 6,188          | 6,188          | 6,188         | 6,188         | 6,188         | 6,188         | 6,188         | 6,188         | 6,188         | 6,188           | \$ 74,256.00     |
| Custodial Supplies & Equipment                                           | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total Operation of Plant                                             | 23,608        | 23,608        | 23,608         | 23,608         | 23,608        | 23,608        | 23,608        | 23,608        | 23,608        | 23,608        | 23,608        | 23,608          | \$ 283,300.90    |
| <b>Maintenance of Plant</b>                                              |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Repairs & Maintenance                                                    |               | 3,652         | 3,652          | 3,652          | 3,652         | 3,652         | 3,652         | 3,652         | 3,652         | 3,652         | 3,652         | 3,652           | \$ 40,170.00     |
| Supplies                                                                 | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total Maintenance of Plant                                           | -             | 3,652         | 3,652          | 3,652          | 3,652         | 3,652         | 3,652         | 3,652         | 3,652         | 3,652         | 3,652         | 3,652           | \$ 40,170.00     |
| <b>Administrative Technology Services</b>                                |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Internal Technology Support                                              | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Technology Personnel                                                     | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Systems Operation                                                        | 1,785         | 1,785         | 1,785          | 1,785          | 1,785         | 1,785         | 1,785         | 1,785         | 1,785         | 1,785         | 1,785         | 1,785           | \$ 21,420.00     |
| Systems Planning & Analysis                                              | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total Administrative Technology Services                             | 1,785         | 1,785         | 1,785          | 1,785          | 1,785         | 1,785         | 1,785         | 1,785         | 1,785         | 1,785         | 1,785         | 1,785           | \$ 21,420.00     |
| <b>After Care Programs</b>                                               |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| After Care Salary                                                        | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Fringe Benefits                                                          | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total After Care Programs                                            | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <b>Debt Service</b>                                                      |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Redemption of Principal                                                  |               | 2,273         | 2,273          | 2,273          | 2,273         | 2,273         | 2,273         | 2,273         | 2,273         | 2,273         | 2,273         | 2,273           | \$ 25,000.00     |
| Interest (Interest Only at 6%)                                           |               | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total Debt Service                                                   |               | 2,273         | 2,273          | 2,273          | 2,273         | 2,273         | 2,273         | 2,273         | 2,273         | 2,273         | 2,273         | 2,273           | \$ 25,000.00     |
| <b>Contingency</b>                                                       |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Operating expense contingency - 3% of FEFP - Considered restricted funds |               |               |                |                |               |               |               |               |               |               |               | 123,714         | \$ 123,713.65    |
| Sub-Total Contingency                                                    |               | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | 123,714         | \$ 123,713.65    |
| <b>Total Expenditures</b>                                                | \$ 96,514.19  | \$ 292,527.34 | \$ 403,142.44  | \$ 413,488.93  | \$ 326,233.03 | \$ 326,233.03 | \$ 332,837.53 | \$ 326,233.03 | \$ 341,733.03 | \$ 332,837.53 | \$ 326,233.03 | \$ 528,741.68   | \$ 4,046,754.77  |
| <b>Excess of Revenues over Expenditures</b>                              | \$ 258,143.39 | \$ 17,710.34  | \$ (67,488.65) | \$ (61,526.80) | \$ 25,729.10  | \$ 25,729.10  | \$ 19,124.60  | \$ 25,729.10  | \$ 10,229.10  | \$ 19,124.60  | \$ 25,729.10  | \$ (176,779.55) | \$ 121,453.44    |
| <b>Fund Balance</b>                                                      | \$ 258,143.39 | \$ 275,853.72 | \$ 208,365.07  | \$ 146,838.28  | \$ 172,567.38 | \$ 198,296.48 | \$ 217,421.08 | \$ 243,150.18 | \$ 253,379.28 | \$ 272,503.88 | \$ 298,232.98 | \$ 121,453.44   |                  |

## Somerset Parks Academy Charter School

|                                                                                                  |         |         |         |         |         |         |         |         |         |         |         |         | YEAR 3           |
|--------------------------------------------------------------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|------------------|
|                                                                                                  |         |         |         |         |         |         |         |         |         |         |         |         | 100 % Enrollment |
|                                                                                                  | Jul     | Aug     | Sep     | Oct     | Nov     | Dec     | Jan     | Feb     | Mar     | Apr     | May     | Jun     |                  |
| REVENUES                                                                                         |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| State Sources with expected enrollment                                                           | 371,686 | 371,686 | 371,686 | 371,686 | 371,686 | 371,686 | 371,686 | 371,686 | 371,686 | 371,686 | 371,686 | 371,686 | \$ 4,460,236.49  |
| Federal Sources - NSLP funds 60% of students                                                     |         |         | 20,928  | 20,928  | 20,928  | 20,928  | 20,928  | 20,928  | 20,928  | 20,928  | 20,928  | 20,928  | \$ 209,276.46    |
| Local Sources - Lunch program paid students                                                      |         |         | 10,534  | 10,534  | 10,534  | 10,534  | 10,534  | 10,534  | 10,534  | 10,534  | 10,534  | 10,534  | \$ 105,340.50    |
| Capital Outlay (Available 1st Year - Advance/Ed Accredited)                                      |         |         |         | 12,847  | 12,847  | 12,847  | 12,847  | 12,847  | 12,847  | 12,847  | 12,847  | 12,847  | \$ 115,625.00    |
| Other Sources - Services                                                                         |         |         |         | 6,944   | 6,944   | 6,944   | 6,944   | 6,944   | 6,944   | 6,944   | 6,944   | 6,944   | \$ 62,500.00     |
| Previous Years Balance Carry Forward                                                             | 121,453 |         |         |         |         |         |         |         |         |         |         |         | \$ 121,453.44    |
|                                                                                                  | 493,140 | 371,686 | 403,148 | 422,940 | 422,940 | 422,940 | 422,940 | 422,940 | 422,940 | 422,940 | 422,940 | 422,940 | \$ 5,074,431.88  |
| EXPENDITURES                                                                                     |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| <b>Instruction</b>                                                                               |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes classroom teachers, contract or hourly, and teacher aides)                    |         | 69,818  | 146,618 | 146,618 | 146,618 | 146,618 | 146,618 | 146,618 | 146,618 | 146,618 | 146,618 | 146,618 | \$ 1,535,997.14  |
| Fringe Benefits                                                                                  |         | 16,756  | 35,188  | 35,188  | 35,188  | 35,188  | 35,188  | 35,188  | 35,188  | 35,188  | 35,188  | 35,188  | \$ 368,639.31    |
| Contracted Professional Services (includes Therapists & other contracted instructional services) |         |         |         | 3,902   | 3,902   | 3,902   | 3,902   | 3,902   | 3,902   | 3,902   | 3,902   | 3,902   | \$ 35,113.50     |
| Classroom Supplies & Equipment                                                                   |         | 9,656   | 9,656   | 9,949   |         |         |         |         |         |         |         |         | \$ 29,261.25     |
| Teacher Supplies                                                                                 |         | 7,510   | 7,510   | 7,738   |         |         |         |         |         |         |         |         | \$ 22,758.75     |
| Textbooks and/or ebooks/Student Activities                                                       |         | 19,849  | 19,849  | 20,450  |         |         |         |         |         |         |         |         | \$ 60,148.13     |
| Supplemental instructional materials (CIRP/SIRP and Technology)                                  |         | 16,094  | 16,094  | 16,581  |         |         |         |         |         |         |         |         | \$ 48,768.75     |
| Digital Education Content Materials (Leased)                                                     |         |         |         |         |         |         |         |         |         |         |         | 97,538  | \$ 97,537.50     |
| Computer - Equipment for Instruction (leased)                                                    |         | 20,394  | 20,394  | 21,012  |         |         |         |         |         |         |         |         | \$ 61,799.76     |
| Computer Lab - Including Software                                                                |         |         |         |         |         |         |         |         |         |         |         |         | \$ -             |
| Sub-Total Instruction                                                                            | -       | 160,077 | 255,309 | 261,438 | 185,708 | 185,708 | 185,708 | 185,708 | 185,708 | 185,708 | 185,708 | 283,245 | \$ 2,260,024.09  |
| <b>Pupil Personnel Services</b>                                                                  |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes counselor, school nurse, health assistant)                                    |         |         | 4,370   | 4,370   | 4,370   | 4,370   | 4,370   | 4,370   | 4,370   | 4,370   | 4,370   | 4,370   | \$ 43,696.80     |
| Fringe Benefits                                                                                  |         |         | 1,049   | 1,049   | 1,049   | 1,049   | 1,049   | 1,049   | 1,049   | 1,049   | 1,049   | 1,049   | \$ 10,487.23     |
| Contracted Professional Services (counseling and psychological)                                  |         |         | 6,633   | 6,633   | 6,633   | 6,633   | 6,633   | 6,633   | 6,633   | 6,633   | 6,633   | 6,633   | \$ 66,325.50     |
| Sub-Total Pupil Personnel Services                                                               | -       | -       | 12,051  | 12,051  | 12,051  | 12,051  | 12,051  | 12,051  | 12,051  | 12,051  | 12,051  | 12,051  | \$ 120,509.53    |
| <b>Media Services</b>                                                                            |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes Librarian)                                                                    |         | 1,939   | 4,072   | 4,072   | 4,072   | 4,072   | 4,072   | 4,072   | 4,072   | 4,072   | 4,072   | 4,072   | \$ 42,656.40     |
| Fringe Benefits                                                                                  |         | 465     | 977     | 977     | 977     | 977     | 977     | 977     | 977     | 977     | 977     | 977     | \$ 10,237.54     |
| Library Books                                                                                    |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Audio Visual Materials                                                                           |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Sub-Total Media Services                                                                         | -       | 2,404   | 5,049   | 5,049   | 5,049   | 5,049   | 5,049   | 5,049   | 5,049   | 5,049   | 5,049   | 5,049   | \$ 52,893.94     |
| <b>Curriculum Development</b>                                                                    |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes Curriculum Specialist)                                                        |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Fringe Benefits                                                                                  |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)                    | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | \$ 74,778.75     |
| Development Supplies                                                                             |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Student Activities                                                                               |         | 4,877   | 4,877   |         |         |         |         |         |         |         |         |         | \$ 9,753.75      |
| Sub-Total Curriculum Development                                                                 | 6,232   | 11,108  | 11,108  | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | 6,232   | \$ 84,532.50     |
| <b>Staff Development</b>                                                                         |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Workshops/Trainings                                                                              |         | 18,500  |         |         |         |         |         |         | 18,500  |         |         |         | \$ 37,000.00     |
| Travel                                                                                           |         | -       |         |         |         |         |         |         | -       |         |         |         | \$ -             |
| Professional Services                                                                            |         | -       |         |         |         |         |         |         | -       |         |         |         | \$ -             |
| Sub-Total Staff Development                                                                      | -       | 18,500  | -       | -       | -       | -       | -       | -       | 18,500  | -       | -       | -       | \$ 37,000.00     |
| <b>Instruction Related Technology</b>                                                            |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes Technology Personnel)                                                         |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Fringe Benefits                                                                                  |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Software and Scanner                                                                             |         | 624     | 624     |         |         |         |         |         |         |         |         |         | \$ 1,248.48      |
| Hardware Maintenance                                                                             |         |         |         | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | \$ 13,733.28     |
| Computer Learning Labs                                                                           |         | -       | -       |         |         |         |         |         |         |         |         |         | \$ -             |
| Sub-Total Instruction Related Technology                                                         | -       | 624     | 624     | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | 1,526   | \$ 14,981.76     |
| <b>Board</b>                                                                                     |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Professional Services (Legal)                                                                    | 2,601   |         |         |         |         |         |         |         |         |         |         |         | \$ 2,601.00      |

## Somerset Parks Academy Charter School

|                                                                            |        |        |        |        |        |        |        |        |        |        |        |        | YEAR 3           |
|----------------------------------------------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|------------------|
|                                                                            |        |        |        |        |        |        |        |        |        |        |        |        | 100 % Enrollment |
|                                                                            |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Insurance (General Liability, D&O, Professional Liability)                 | 7,940  |        |        | 7,940  |        |        | 7,940  |        |        | 7,940  |        |        | \$ 31,758.21     |
| Travel                                                                     | 2,081  |        |        |        |        |        |        |        |        |        |        |        | \$ 2,080.80      |
| Sub-Total Board                                                            | 12,621 | -      | -      | 7,940  | -      | -      | 7,940  | -      | -      | 7,940  | -      | -      | \$ 36,440.01     |
| <b>General Administration</b>                                              |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Management Fees (Portion of the \$450 fee charged by ESP)                  | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | \$ 146,306.25    |
| Administrative Fee                                                         | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Sub-Total General Administration                                           | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | 12,192 | \$ 146,306.25    |
| <b>School Administration</b>                                               |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (includes Principal, Secretary & other Office Personnel)          | 19,081 | 19,081 | 19,081 | 19,081 | 19,081 | 19,081 | 19,081 | 19,081 | 19,081 | 19,081 | 19,081 | 19,081 | \$ 228,972.36    |
| Fringe Benefits                                                            | 4,579  | 4,579  | 4,579  | 4,579  | 4,579  | 4,579  | 4,579  | 4,579  | 4,579  | 4,579  | 4,579  | 4,579  | \$ 54,953.37     |
| Equipment Rental / Lease                                                   | 312    | 312    | 312    | 312    | 312    | 312    | 312    | 312    | 312    | 312    | 312    | 312    | \$ 3,745.44      |
| Travel                                                                     |        |        |        | 2,497  |        |        |        |        |        |        |        |        | \$ 2,496.96      |
| Advertising and Promotion                                                  | 1,084  | 1,084  | 1,084  |        |        |        |        |        |        |        |        |        | \$ 3,251.25      |
| License Fees                                                               | 208    |        |        |        |        |        |        |        |        |        |        |        | \$ 208.08        |
| Dues and Subscriptions                                                     | 2,601  |        |        |        |        |        |        |        |        |        |        |        | \$ 2,601.00      |
| Postage                                                                    |        |        | 172    | 172    | 172    | 172    | 172    | 172    | 172    | 172    | 172    | 172    | \$ 1,716.66      |
| Printing                                                                   | 3,862  | 351    | 351    | 351    | 351    | 351    | 351    | 351    | 351    | 351    | 351    | 351    | \$ 7,724.97      |
| Office Supplies                                                            | 3,906  | 1,065  | 1,065  | 1,065  | 1,065  | 1,065  | 1,065  | 1,065  | 1,065  | 1,065  | 1,065  | 1,065  | \$ 15,625.00     |
| Office Equipment                                                           | 1,561  |        |        |        |        |        |        |        |        |        |        |        | \$ 1,560.80      |
| Computer Equipment                                                         | 2,081  |        |        |        |        |        |        |        |        |        |        |        | \$ 2,080.80      |
| Sub-Total School Administration                                            | 39,276 | 26,473 | 26,644 | 28,058 | 25,561 | 25,561 | 25,561 | 25,561 | 25,561 | 25,561 | 25,561 | 25,561 | \$ 324,936.48    |
| <b>Facilities Acquisition &amp; Construction</b>                           |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Building Lease / Rent (see budget summary for calculation)                 |        | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | \$ 596,756.25    |
| Remodeling & Renovations                                                   | -      |        |        |        |        |        |        |        |        |        |        |        | \$ -             |
| Purchase of Buildings & Fixed Equipment                                    | -      |        |        |        |        |        |        |        |        |        |        |        | \$ -             |
| Land                                                                       | -      |        |        |        |        |        |        |        |        |        |        |        | \$ -             |
| Sub-Total Facilities Acquisition & Construction                            | -      | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | 54,251 | \$ 596,756.25    |
| <b>Fiscal Services</b>                                                     |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Business Manager, Accounting & Bookkeeping Personnel)            | 3,468  | 3,468  | 3,468  | 3,468  | 3,468  | 3,468  | 3,468  | 3,468  | 3,468  | 3,468  | 3,468  | 3,468  | \$ 41,616.00     |
| Fringe Benefits                                                            | 832    | 832    | 832    | 832    | 832    | 832    | 832    | 832    | 832    | 832    | 832    | 832    | \$ 9,967.84      |
| Fee to County School Board - up to 250 students                            | 7,375  | 7,375  | 7,375  | 7,375  | 7,375  | 7,375  | 7,375  | 7,375  | 7,375  | 7,375  | 7,375  | 7,375  | \$ 88,496.76     |
| Planning, Research, Development and Evaluation (Part of ESP's Fee)         | 5,961  | 5,961  | 5,961  | 5,961  | 5,961  | 5,961  | 5,961  | 5,961  | 5,961  | 5,961  | 5,961  | 5,961  | \$ 71,527.60     |
| Professional Services - Annual Audit                                       | 737    | 737    | 737    | 737    | 737    | 737    | 737    | 737    | 737    | 737    | 737    | 737    | \$ 8,843.40      |
| Sub-Total Fiscal Services                                                  | 18,373 | 18,373 | 18,373 | 18,373 | 18,373 | 18,373 | 18,373 | 18,373 | 18,373 | 18,373 | 18,373 | 18,373 | \$ 220,471.50    |
| <b>Food Services</b>                                                       |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Food Service Workers)                                            |        |        | 2,913  | 2,913  | 2,913  | 2,913  | 2,913  | 2,913  | 2,913  | 2,913  | 2,913  | 2,913  | \$ 29,131.20     |
| Fringe Benefits                                                            |        |        | 699    | 699    | 699    | 699    | 699    | 699    | 699    | 699    | 699    | 699    | \$ 6,991.49      |
| Food                                                                       |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Food, Materials & Supplies - Vendor provided meals 90% Participation       |        |        | 25,914 | 25,914 | 25,914 | 25,914 | 25,914 | 25,914 | 25,914 | 25,914 | 25,914 | 25,914 | \$ 259,137.63    |
| Equipment Rental / Lease (provided by food vendor)                         |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Inspection fees                                                            |        |        | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | \$ 156.06        |
| Sub-Total Food Services                                                    | -      | -      | 29,542 | 29,542 | 29,542 | 29,542 | 29,542 | 29,542 | 29,542 | 29,542 | 29,542 | 29,542 | \$ 295,416.38    |
| <b>Pupil Transportation Services</b>                                       |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Drivers & Transportation workers)                                |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Fringe Benefits                                                            |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Contracted Transportation Services - \$235 per bus per day 20% utilization |        |        | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | \$ 104,400.00    |
| Field Trip Expenses for competitions                                       |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Buses                                                                      |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Repairs & Maintenance                                                      |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Fuel                                                                       |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Sub-Total Pupil Transportation Services                                    | -      | -      | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | \$ 104,400.00    |
| <b>Operation of Plant</b>                                                  |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Custodian, crossing guards, security)                            | 3,607  | 3,607  | 3,607  | 3,607  | 3,607  | 3,607  | 3,607  | 3,607  | 3,607  | 3,607  | 3,607  | 3,607  | \$ 43,282.30     |
| Fringe benefits                                                            | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | \$ 10,387.75     |
| Purchased Service (Custodial, fire and alarm, etc)                         | 7,153  | 7,153  | 7,153  | 7,153  | 7,153  | 7,153  | 7,153  | 7,153  | 7,153  | 7,153  | 7,153  | 7,153  | \$ 85,833.00     |
| Lawn Maintenance                                                           | 572    | 572    | 572    | 572    | 572    | 572    | 572    | 572    | 572    | 572    | 572    | 572    | \$ 6,866.64      |

## Somerset Parks Academy Charter School

|                                                                          |               |               |                |                |               |               |               |               |               |               |               |                 | YEAR 3           |
|--------------------------------------------------------------------------|---------------|---------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|------------------|
|                                                                          |               |               |                |                |               |               |               |               |               |               |               |                 | 100 % Enrollment |
| Pest Control                                                             | 114           | 114           | 114            | 114            | 114           | 114           | 114           | 114           | 114           | 114           | 114           | 114             | \$ 1,373.33      |
| Security Services                                                        | 312           | 312           | 312            | 312            | 312           | 312           | 312           | 312           | 312           | 312           | 312           | 312             | \$ 3,745.44      |
| Property Insurance                                                       | 6,867         | 6,867         | 6,867          | 6,867          | 6,867         | 6,867         | 6,867         | 6,867         | 6,867         | 6,867         | 6,867         | 6,867           | \$ 82,399.68     |
| Telephone Services                                                       | 312           | 312           | 312            | 312            | 312           | 312           | 312           | 312           | 312           | 312           | 312           | 312             | \$ 3,745.44      |
| Water & Sewer                                                            | 229           | 229           | 229            | 229            | 229           | 229           | 229           | 229           | 229           | 229           | 229           | 229             | \$ 2,746.66      |
| Electricity                                                              | 7,439         | 7,439         | 7,439          | 7,439          | 7,439         | 7,439         | 7,439         | 7,439         | 7,439         | 7,439         | 7,439         | 7,439           | \$ 89,266.32     |
| Custodial Supplies & Equipment                                           | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total Operation of Plant                                             | 27,471        | 27,471        | 27,471         | 27,471         | 27,471        | 27,471        | 27,471        | 27,471        | 27,471        | 27,471        | 27,471        | 27,471          | \$ 329,646.56    |
| <b>Maintenance of Plant</b>                                              |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Repairs & Maintenance                                                    |               | 4,432         | 4,432          | 4,432          | 4,432         | 4,432         | 4,432         | 4,432         | 4,432         | 4,432         | 4,432         | 4,432           | \$ 48,750.00     |
| Supplies                                                                 | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total Maintenance of Plant                                           | -             | 4,432         | 4,432          | 4,432          | 4,432         | 4,432         | 4,432         | 4,432         | 4,432         | 4,432         | 4,432         | 4,432           | \$ 48,750.00     |
| <b>Administrative Technology Services</b>                                |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Internal Technology Support                                              | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Technology Personnel                                                     | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Systems Operation                                                        | 2,146         | 2,146         | 2,146          | 2,146          | 2,146         | 2,146         | 2,146         | 2,146         | 2,146         | 2,146         | 2,146         | 2,146           | \$ 25,749.90     |
| Systems Planning & Analysis                                              | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total Administrative Technology Services                             | 2,146         | 2,146         | 2,146          | 2,146          | 2,146         | 2,146         | 2,146         | 2,146         | 2,146         | 2,146         | 2,146         | 2,146           | \$ 25,749.90     |
| <b>After Care Programs</b>                                               |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| After Care Salary                                                        |               |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Fringe Benefits                                                          |               |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total After Care Programs                                            |               |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <b>Debt Service</b>                                                      |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Redemption of Principal                                                  |               | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Interest (Interest Only at 6%)                                           |               | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Sub-Total Debt Service                                                   |               | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <b>Contingency</b>                                                       |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Operating expense contingency - 3% of FEFP - Considered restricted funds |               |               |                |                |               |               |               |               |               |               |               | 148,589         | \$ 148,589.35    |
| Sub-Total Contingency                                                    |               | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | 148,589         | \$ 148,589.35    |
| <b>Total Expenditures</b>                                                | \$ 118,309.66 | \$ 338,050.81 | \$ 469,631.59  | \$ 481,138.02  | \$ 394,971.06 | \$ 394,971.06 | \$ 402,910.61 | \$ 394,971.06 | \$ 413,471.06 | \$ 402,910.61 | \$ 394,971.06 | \$ 641,097.91   | \$ 4,847,404.50  |
| <b>Excess of Revenues over Expenditures</b>                              | \$ 374,830.15 | \$ 33,635.56  | \$ (66,483.52) | \$ (58,198.29) | \$ 27,968.68  | \$ 27,968.68  | \$ 20,029.13  | \$ 27,968.68  | \$ 9,468.68   | \$ 20,029.13  | \$ 27,968.68  | \$ (218,158.17) | \$ 227,027.39    |
| <b>Fund Balance</b>                                                      | \$ 374,830.15 | \$ 408,465.71 | \$ 341,982.19  | \$ 283,783.90  | \$ 311,752.58 | \$ 339,721.26 | \$ 359,750.39 | \$ 387,719.07 | \$ 397,187.75 | \$ 417,216.88 | \$ 445,185.56 | \$ 227,027.39   |                  |

## Somerset Parks Academy Charter School

| Somerset Parks Academy Charter School                                                            |         |         |         |         |         |         |         |         |         |         |         |         | YEAR 4 |              |
|--------------------------------------------------------------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------|--------------|
| 100 % Enrollment                                                                                 |         |         |         |         |         |         |         |         |         |         |         |         |        |              |
|                                                                                                  | Jul     | Aug     | Sep     | Oct     | Nov     | Dec     | Jan     | Feb     | Mar     | Apr     | May     | Jun     |        |              |
| REVENUES                                                                                         |         |         |         |         |         |         |         |         |         |         |         |         |        |              |
| State Sources with expected enrollment                                                           | 387,070 | 387,070 | 387,070 | 387,070 | 387,070 | 387,070 | 387,070 | 387,070 | 387,070 | 387,070 | 387,070 | 387,070 | \$     | 4,644,838.91 |
| Federal Sources - NSLP funds 60% of students                                                     |         |         | 22,132  | 22,132  | 22,132  | 22,132  | 22,132  | 22,132  | 22,132  | 22,132  | 22,132  | 22,132  | \$     | 221,317.39   |
| Local Sources - Lunch program paid students                                                      |         |         | 11,140  | 11,140  | 11,140  | 11,140  | 11,140  | 11,140  | 11,140  | 11,140  | 11,140  | 11,140  | \$     | 111,401.37   |
| Capital Outlay (Available 1st Year - Advance/Ed Accredited)                                      |         |         | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | \$     | 119,880.00   |
| Other Sources - Services                                                                         |         |         |         | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | \$     | 64,800.00    |
| Previous Years Balance Carry Forward                                                             | 227,027 |         |         |         |         |         |         |         |         |         |         |         | \$     | 227,027.39   |
|                                                                                                  | 614,097 | 387,070 | 420,342 | 440,862 | 440,862 | 440,862 | 440,862 | 440,862 | 440,862 | 440,862 | 440,862 | 440,862 | \$     | 5,389,265.06 |
| EXPENDITURES                                                                                     |         |         |         |         |         |         |         |         |         |         |         |         |        |              |
| Instruction                                                                                      |         |         |         |         |         |         |         |         |         |         |         |         |        |              |
| Salaries (includes classroom teachers, contract or hourly, and teacher aides)                    |         | 73,201  | 153,723 | 153,723 | 153,723 | 153,723 | 153,723 | 153,723 | 153,723 | 153,723 | 153,723 | 153,723 | \$     | 1,610,430.89 |
| Fringe Benefits                                                                                  |         | 17,568  | 36,894  | 36,894  | 36,894  | 36,894  | 36,894  | 36,894  | 36,894  | 36,894  | 36,894  | 36,894  | \$     | 386,503.41   |
| Contracted Professional Services (includes Therapists & other contracted instructional services) |         |         |         | 4,126   | 4,126   | 4,126   | 4,126   | 4,126   | 4,126   | 4,126   | 4,126   | 4,126   | \$     | 37,133.79    |
| Classroom Supplies & Equipment                                                                   |         | 10,212  | 10,212  | 10,521  |         |         |         |         |         |         |         |         | \$     | 30,944.83    |
| Teacher Supplies                                                                                 |         | 7,943   | 7,943   | 8,183   |         |         |         |         |         |         |         |         | \$     | 24,068.20    |
| Textbooks and/or ebooks/Student Activities                                                       |         | 20,991  | 20,991  | 21,627  |         |         |         |         |         |         |         |         | \$     | 63,608.81    |
| Supplemental instructional materials (CIRP/SIRP and Technology)                                  |         | 17,020  | 17,020  | 17,535  |         |         |         |         |         |         |         |         | \$     | 51,574.71    |
| Digital Education Content Materials (Leased)                                                     |         |         |         |         |         |         |         |         |         |         |         | 103,149 | \$     | 103,149.42   |
| Computer - Equipment for Instruction (leased)                                                    |         | 21,432  | 21,432  | 22,082  |         |         |         |         |         |         |         |         | \$     | 64,945.93    |
| Computer Lab - Including Software                                                                |         | -       | -       | -       |         |         |         |         |         |         |         |         | \$     | -            |
| Sub-Total Instruction                                                                            | -       | 168,367 | 268,213 | 274,691 | 194,742 | 194,742 | 194,742 | 194,742 | 194,742 | 194,742 | 194,742 | 297,892 | \$     | 2,372,359.99 |
| Pupil Personnel Services                                                                         |         |         |         |         |         |         |         |         |         |         |         |         |        |              |
| Salaries (includes counselor, school nurse, health assistant)                                    |         |         | 4,457   | 4,457   | 4,457   | 4,457   | 4,457   | 4,457   | 4,457   | 4,457   | 4,457   | 4,457   | \$     | 44,570.74    |
| Fringe Benefits                                                                                  |         |         | 1,070   | 1,070   | 1,070   | 1,070   | 1,070   | 1,070   | 1,070   | 1,070   | 1,070   | 1,070   | \$     | 10,696.98    |
| Contracted Professional Services (counseling and psychological)                                  |         |         | 7,014   | 7,014   | 7,014   | 7,014   | 7,014   | 7,014   | 7,014   | 7,014   | 7,014   | 7,014   | \$     | 70,141.60    |
| Sub-Total Pupil Personnel Services                                                               | -       | -       | 12,541  | 12,541  | 12,541  | 12,541  | 12,541  | 12,541  | 12,541  | 12,541  | 12,541  | 12,541  | \$     | 125,409.32   |
| Media Services                                                                                   |         |         |         |         |         |         |         |         |         |         |         |         |        |              |
| Salaries (includes Librarian)                                                                    |         | 1,978   | 4,153   | 4,153   | 4,153   | 4,153   | 4,153   | 4,153   | 4,153   | 4,153   | 4,153   | 4,153   | \$     | 43,509.53    |
| Fringe Benefits                                                                                  |         | 475     | 997     | 997     | 997     | 997     | 997     | 997     | 997     | 997     | 997     | 997     | \$     | 10,442.29    |
| Library Books                                                                                    |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$     | -            |
| Audio Visual Materials                                                                           |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$     | -            |
| Sub-Total Media Services                                                                         | -       | 2,452   | 5,150   | 5,150   | 5,150   | 5,150   | 5,150   | 5,150   | 5,150   | 5,150   | 5,150   | 5,150   | \$     | 53,951.81    |
| Curriculum Development                                                                           |         |         |         |         |         |         |         |         |         |         |         |         |        |              |
| Salaries (includes Curriculum Specialist)                                                        |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$     | -            |
| Fringe Benefits                                                                                  |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$     | -            |
| Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)                    | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | \$     | 79,081.22    |
| Development Supplies                                                                             |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$     | -            |
| Student Activities                                                                               |         | 5,157   | 5,157   |         |         |         |         |         |         |         |         |         | \$     | 10,314.94    |
| Sub-Total Curriculum Development                                                                 | 6,590   | 11,748  | 11,748  | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | 6,590   | \$     | 89,396.16    |
| Staff Development                                                                                |         |         |         |         |         |         |         |         |         |         |         |         |        |              |
| Workshops/Trainings                                                                              |         | 19,000  |         |         |         |         |         |         | 19,000  |         |         |         | \$     | 38,000.00    |
| Travel                                                                                           |         | -       |         |         |         |         |         |         | -       |         |         |         | \$     | -            |
| Professional Services                                                                            |         | -       |         |         |         |         |         |         | -       |         |         |         | \$     | -            |
| Sub-Total Staff Development                                                                      | -       | 19,000  | -       | -       | -       | -       | -       | -       | 19,000  | -       | -       | -       | \$     | 38,000.00    |

## Somerset Parks Academy Charter School

|                                                                      |  |        |        |        |        |        |        |        |        |        |        |        |        | YEAR 4           |            |
|----------------------------------------------------------------------|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|------------------|------------|
|                                                                      |  |        |        |        |        |        |        |        |        |        |        |        |        | 100 % Enrollment |            |
| <b>Instruction Related Technology</b>                                |  |        |        |        |        |        |        |        |        |        |        |        |        |                  |            |
| Salaries (includes Technology Personnel)                             |  | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$               | -          |
| Fringe Benefits                                                      |  |        |        |        |        |        |        |        |        |        |        |        |        | \$               | -          |
| Software and Scanner                                                 |  | 637    | 637    |        |        |        |        |        |        |        |        |        |        | \$               | 1,273.45   |
| Hardware Maintenance                                                 |  |        |        |        |        |        |        |        |        |        |        |        |        | \$               | 14,432.43  |
| Computer Learning Labs                                               |  |        |        |        |        |        |        |        |        |        |        |        |        | \$               | -          |
| <b>Sub-Total Instruction Related Technology</b>                      |  | -      | 637    | 637    | 1,604  | 1,604  | 1,604  | 1,604  | 1,604  | 1,604  | 1,604  | 1,604  | 1,604  | \$               | 15,705.88  |
| <b>Board</b>                                                         |  |        |        |        |        |        |        |        |        |        |        |        |        |                  |            |
| Professional Services (Legal)                                        |  | 2,653  |        |        |        |        |        |        |        |        |        |        |        | \$               | 2,653.02   |
| Insurance (General Liability, D&O, Professional Liability)           |  | 8,344  |        |        | 8,344  |        |        | 8,344  |        |        |        | 8,344  |        | \$               | 33,374.99  |
| Travel                                                               |  | 2,122  |        |        |        |        |        |        |        |        |        |        |        | \$               | 2,122.42   |
| <b>Sub-Total Board</b>                                               |  | 13,119 | -      | -      | 8,344  | -      | -      | 8,344  | -      | -      |        | 8,344  | -      | \$               | 38,150.43  |
| <b>General Administration</b>                                        |  |        |        |        |        |        |        |        |        |        |        |        |        |                  |            |
| Management Fees (Portion of the \$450 fee charged by ESP)            |  | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | \$               | 154,724.13 |
| Administrative Fee                                                   |  | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$               | -          |
| <b>Sub-Total General Administration</b>                              |  | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | 12,894 | \$               | 154,724.13 |
| <b>School Administration</b>                                         |  |        |        |        |        |        |        |        |        |        |        |        |        |                  |            |
| Salaries (includes Principal, Secretary & other Office Personnel)    |  | 19,463 | 19,463 | 19,463 | 19,463 | 19,463 | 19,463 | 19,463 | 19,463 | 19,463 | 19,463 | 19,463 | 19,463 | \$               | 233,551.80 |
| Fringe Benefits                                                      |  | 4,671  | 4,671  | 4,671  | 4,671  | 4,671  | 4,671  | 4,671  | 4,671  | 4,671  | 4,671  | 4,671  | 4,671  | \$               | 56,052.43  |
| Equipment Rental / Lease                                             |  | 318    | 318    | 318    | 318    | 318    | 318    | 318    | 318    | 318    | 318    | 318    | 318    | \$               | 3,820.35   |
| Travel                                                               |  |        |        |        | 2,547  |        |        |        |        |        |        |        |        | \$               | 2,546.90   |
| Advertising and Promotion                                            |  | 1,146  | 1,146  | 1,146  |        |        |        |        |        |        |        |        |        | \$               | 3,438.31   |
| License Fees                                                         |  | 212    |        |        |        |        |        |        |        |        |        |        |        | \$               | 212.24     |
| Dues and Subscriptions                                               |  | 2,751  |        |        |        |        |        |        |        |        |        |        |        | \$               | 2,750.65   |
| Postage                                                              |  |        |        | 180    | 180    | 180    | 180    | 180    | 180    | 180    | 180    | 180    | 180    | \$               | 1,804.05   |
| Printing                                                             |  | 4,059  | 369    | 369    | 369    | 369    | 369    | 369    | 369    | 369    | 369    | 369    | 369    | \$               | 8,118.24   |
| Office Supplies                                                      |  | 4,050  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | \$               | 16,200.00  |
| Computer Equipment                                                   |  | 1,592  |        |        |        |        |        |        |        |        |        |        |        | \$               | 1,591.81   |
| Computer Equipment                                                   |  | 2,122  |        |        |        |        |        |        |        |        |        |        |        | \$               | 2,122.42   |
| <b>Sub-Total School Administration</b>                               |  | 40,384 | 27,072 | 27,252 | 28,653 | 26,106 | 26,106 | 26,106 | 26,106 | 26,106 | 26,106 | 26,106 | 26,106 | \$               | 332,209.21 |
| <b>Facilities Acquisition &amp; Construction</b>                     |  |        |        |        |        |        |        |        |        |        |        |        |        |                  |            |
| Building Lease / Rent (see budget summary for calculation)           |  |        | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | \$               | 637,278.39 |
| Remodeling & Renovations                                             |  | -      |        |        |        |        |        |        |        |        |        |        |        | \$               | -          |
| Purchase of Buildings & Fixed Equipment                              |  | -      |        |        |        |        |        |        |        |        |        |        |        | \$               | -          |
| Land                                                                 |  | -      |        |        |        |        |        |        |        |        |        |        |        | \$               | -          |
| <b>Sub-Total Facilities Acquisition &amp; Construction</b>           |  | -      | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | 57,934 | \$               | 637,278.39 |
| <b>Fiscal Services</b>                                               |  |        |        |        |        |        |        |        |        |        |        |        |        |                  |            |
| Salaries (Business Manager, Accounting & Bookkeeping Personnel)      |  | 3,537  | 3,537  | 3,537  | 3,537  | 3,537  | 3,537  | 3,537  | 3,537  | 3,537  | 3,537  | 3,537  | 3,537  | \$               | 42,448.32  |
| Fringe Benefits                                                      |  | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | 849    | \$               | 10,187.60  |
| Fee to County School Board - up to 250 students                      |  | 7,421  | 7,421  | 7,421  | 7,421  | 7,421  | 7,421  | 7,421  | 7,421  | 7,421  | 7,421  | 7,421  | 7,421  | \$               | 89,049.83  |
| Planning, Research, Development and Evaluation (Part of ESP's Fee)   |  | 6,304  | 6,304  | 6,304  | 6,304  | 6,304  | 6,304  | 6,304  | 6,304  | 6,304  | 6,304  | 6,304  | 6,304  | \$               | 75,842.91  |
| Professional Services - Annual Audit                                 |  | 752    | 752    | 752    | 752    | 752    | 752    | 752    | 752    | 752    | 752    | 752    | 752    | \$               | 9,020.27   |
| <b>Sub-Total Fiscal Services</b>                                     |  | 18,862 | 18,862 | 18,862 | 18,862 | 18,862 | 18,862 | 18,862 | 18,862 | 18,862 | 18,862 | 18,862 | 18,862 | \$               | 226,348.92 |
| <b>Food Services</b>                                                 |  |        |        |        |        |        |        |        |        |        |        |        |        |                  |            |
| Salaries (Food Service Workers)                                      |  |        |        | 2,971  | 2,971  | 2,971  | 2,971  | 2,971  | 2,971  | 2,971  | 2,971  | 2,971  | 2,971  | \$               | 20,713.82  |
| Fringe Benefits                                                      |  |        |        | 713    | 713    | 713    | 713    | 713    | 713    | 713    | 713    | 713    | 713    | \$               | 7,131.32   |
| Food                                                                 |  |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$               | -          |
| Food, Materials & Supplies - Vendor provided meals 90% Participation |  |        |        | 27,405 | 27,405 | 27,405 | 27,405 | 27,405 | 27,405 | 27,405 | 27,405 | 27,405 | 27,405 | \$               | 274,047.37 |
| Equipment Rental / Lease (provided by food vendor)                   |  |        |        | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$               | -          |
| Inspection fees                                                      |  |        |        | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | \$               | 159.18     |
| <b>Sub-Total Food Services</b>                                       |  | -      | -      | 31,105 | 31,105 | 31,105 | 31,105 | 31,105 | 31,105 | 31,105 | 31,105 | 31,105 | 31,105 | \$               | 311,051.70 |

## Somerset Parks Academy Charter School

|                                                                            | YEAR 4           |               |                |                |               |               |               |               |               |               |               |                 |                 |
|----------------------------------------------------------------------------|------------------|---------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|-----------------|
|                                                                            | 100 % Enrollment |               |                |                |               |               |               |               |               |               |               |                 |                 |
| <b>Pupil Transportation Services</b>                                       |                  |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Salaries (Drivers & Transportation workers)                                |                  |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Fringe Benefits                                                            |                  |               |                |                |               |               |               |               |               |               |               |                 | \$ -            |
| Contracted Transportation Services - \$235 per bus per day 20% utilization |                  |               | 10,440         | 10,440         | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440          | \$ 104,400.00   |
| Field Trip Expenses for competitions                                       |                  |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Buses                                                                      |                  |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Repairs & Maintenance                                                      |                  |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Fuel                                                                       |                  |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Sub-Total Pupil Transportation Services</b>                             | -                | -             | 10,440         | 10,440         | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440        | 10,440          | \$ 104,400.00   |
| <b>Operation of Plant</b>                                                  |                  |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Salaries (Custodian, crossing guards, security)                            | 3,679            | 3,679         | 3,679          | 3,679          | 3,679         | 3,679         | 3,679         | 3,679         | 3,679         | 3,679         | 3,679         | 3,679           | \$ 44,147.95    |
| Fringe benefits                                                            | 883              | 883           | 883            | 883            | 883           | 883           | 883           | 883           | 883           | 883           | 883           | 883             | \$ 10,595.51    |
| Purchased Service (Custodial, fire and alarm, etc)                         | 7,517            | 7,517         | 7,517          | 7,517          | 7,517         | 7,517         | 7,517         | 7,517         | 7,517         | 7,517         | 7,517         | 7,517           | \$ 90,202.68    |
| Lawn Maintenance                                                           | 601              | 601           | 601            | 601            | 601           | 601           | 601           | 601           | 601           | 601           | 601           | 601             | \$ 7,216.21     |
| Pest Control                                                               | 120              | 120           | 120            | 120            | 120           | 120           | 120           | 120           | 120           | 120           | 120           | 120             | \$ 1,443.24     |
| Security Services                                                          | 318              | 318           | 318            | 318            | 318           | 318           | 318           | 318           | 318           | 318           | 318           | 318             | \$ 3,820.35     |
| Property Insurance                                                         | 7,216            | 7,216         | 7,216          | 7,216          | 7,216         | 7,216         | 7,216         | 7,216         | 7,216         | 7,216         | 7,216         | 7,216           | \$ 86,594.57    |
| Telephone Services                                                         | 318              | 318           | 318            | 318            | 318           | 318           | 318           | 318           | 318           | 318           | 318           | 318             | \$ 3,820.35     |
| Water & Sewer                                                              | 241              | 241           | 241            | 241            | 241           | 241           | 241           | 241           | 241           | 241           | 241           | 241             | \$ 2,886.49     |
| Electricity                                                                | 7,818            | 7,818         | 7,818          | 7,818          | 7,818         | 7,818         | 7,818         | 7,818         | 7,818         | 7,818         | 7,818         | 7,818           | \$ 93,810.79    |
| Custodial Supplies & Equipment                                             | -                | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Sub-Total Operation of Plant</b>                                        | 28,712           | 28,712        | 28,712         | 28,712         | 28,712        | 28,712        | 28,712        | 28,712        | 28,712        | 28,712        | 28,712        | 28,712          | \$ 344,538.14   |
| <b>Maintenance of Plant</b>                                                |                  |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Repairs & Maintenance                                                      |                  | 4,595         | 4,595          | 4,595          | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595           | \$ 50,544.00    |
| Supplies                                                                   | -                | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Sub-Total Maintenance of Plant</b>                                      | -                | 4,595         | 4,595          | 4,595          | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595           | \$ 50,544.00    |
| <b>Administrative Technology Services</b>                                  |                  |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Internal Technology Support                                                | -                | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Technology Personnel                                                       | -                | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Systems Operation                                                          | 2,255            | 2,255         | 2,255          | 2,255          | 2,255         | 2,255         | 2,255         | 2,255         | 2,255         | 2,255         | 2,255         | 2,255           | \$ 27,060.80    |
| Systems Planning & Analysis                                                | -                | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Sub-Total Administrative Technology Services</b>                        | 2,255            | 2,255         | 2,255          | 2,255          | 2,255         | 2,255         | 2,255         | 2,255         | 2,255         | 2,255         | 2,255         | 2,255           | \$ 27,060.80    |
| <b>After Care Programs</b>                                                 |                  |               |                |                |               |               |               |               |               |               |               |                 |                 |
| After Care Salary                                                          |                  |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Fringe Benefits                                                            |                  |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Sub-Total After Care Programs</b>                                       |                  |               | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Debt Service</b>                                                        |                  |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Redemption of Principal                                                    |                  | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| Interest (Interest Only at 6%)                                             |                  | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Sub-Total Debt Service</b>                                              |                  | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -            |
| <b>Contingency</b>                                                         |                  |               |                |                |               |               |               |               |               |               |               |                 |                 |
| Operating expense contingency - 3% of FEFP - Considered restricted funds   |                  |               |                |                |               |               |               |               |               |               |               | 154,867         | \$ 154,867.13   |
| <b>Sub-Total Contingency</b>                                               |                  |               |                |                |               |               |               |               |               |               |               | 154,867         | \$ 154,867.13   |
| <b>Total Expenditures</b>                                                  | \$ 122,816.35    | \$ 354,527.09 | \$ 492,337.90  | \$ 504,369.26  | \$ 413,530.17 | \$ 413,530.17 | \$ 421,873.92 | \$ 413,530.17 | \$ 432,530.17 | \$ 421,873.92 | \$ 413,530.17 | \$ 671,546.72   | \$ 5,075,996.00 |
| <b>Excess of Revenues over Expenditures</b>                                | \$ 491,280.95    | \$ 32,542.82  | \$ (71,996.12) | \$ (63,507.47) | \$ 27,331.62  | \$ 27,331.62  | \$ 18,987.87  | \$ 27,331.62  | \$ 8,331.62   | \$ 18,987.87  | \$ 27,331.62  | \$ (230,684.93) | \$ 313,269.06   |
| <b>Fund Balance</b>                                                        | \$ 491,280.95    | \$ 523,823.77 | \$ 451,827.65  | \$ 388,320.18  | \$ 415,651.79 | \$ 442,983.41 | \$ 461,971.28 | \$ 489,302.89 | \$ 497,634.51 | \$ 516,622.38 | \$ 543,953.99 | \$ 313,269.06   |                 |



## Somerset Parks Academy Charter School

|                                                                                                  |         |         |         |         |         |         |         |         |         |         |         |         | YEAR 5           |
|--------------------------------------------------------------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|------------------|
|                                                                                                  |         |         |         |         |         |         |         |         |         |         |         |         | 100 % Enrollment |
|                                                                                                  | Jul     | Aug     | Sep     | Oct     | Nov     | Dec     | Jan     | Feb     | Mar     | Apr     | May     | Jun     |                  |
| REVENUES                                                                                         |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| State Sources with expected enrollment                                                           | 390,941 | 390,941 | 390,941 | 390,941 | 390,941 | 390,941 | 390,941 | 390,941 | 390,941 | 390,941 | 390,941 | 390,941 | \$ 4,691,287.30  |
| Federal Sources - NSLP funds 60% of students                                                     |         |         | 22,574  | 22,574  | 22,574  | 22,574  | 22,574  | 22,574  | 22,574  | 22,574  | 22,574  | 22,574  | \$ 225,743.74    |
| Local Sources - Lunch program paid students                                                      |         |         | 11,363  | 11,363  | 11,363  | 11,363  | 11,363  | 11,363  | 11,363  | 11,363  | 11,363  | 11,363  | \$ 113,029.40    |
| Capital Outlay (Available 1st Year - Advance/Ed Accredited)                                      |         |         |         | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | 13,320  | \$ 119,880.00    |
| Other Sources - Services                                                                         |         |         |         | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | 7,200   | \$ 64,800.00     |
| Previous Years Balance Carry Forward                                                             | 313,269 |         |         |         |         |         |         |         |         |         |         |         | \$ 313,269.06    |
|                                                                                                  | 704,210 | 390,941 | 424,878 | 445,398 | 445,398 | 445,398 | 445,398 | 445,398 | 445,398 | 445,398 | 445,398 | 445,398 | \$ 5,528,609.49  |
| EXPENDITURES                                                                                     |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| <b>Instruction</b>                                                                               |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes classroom teachers, contract or hourly, and teacher aides)                    |         | 74,665  | 156,797 | 156,797 | 156,797 | 156,797 | 156,797 | 156,797 | 156,797 | 156,797 | 156,797 | 156,797 | \$ 1,642,639.51  |
| Fringe Benefits                                                                                  |         | 17,920  | 37,631  | 37,631  | 37,631  | 37,631  | 37,631  | 37,631  | 37,631  | 37,631  | 37,631  | 37,631  | \$ 394,233.48    |
| Contracted Professional Services (includes Therapists & other contracted instructional services) |         |         |         | 4,208   | 4,208   | 4,208   | 4,208   | 4,208   | 4,208   | 4,208   | 4,208   | 4,208   | \$ 37,876.47     |
| Classroom Supplies & Equipment                                                                   |         | 10,416  | 10,416  | 10,732  |         |         |         |         |         |         |         |         | \$ 31,563.72     |
| Teacher Supplies                                                                                 |         | 8,101   | 8,101   | 8,347   |         |         |         |         |         |         |         |         | \$ 24,549.56     |
| Textbooks and/or ebooks/Student Activities                                                       |         | 10,705  | 10,705  | 11,030  |         |         |         |         |         |         |         |         | \$ 32,440.49     |
| Supplemental Instructional Materials (CIRP/SIRP and Technology)                                  |         | 17,360  | 17,360  | 17,886  |         |         |         |         |         |         |         |         | \$ 52,606.20     |
| Digital Education Content Materials (Leased)                                                     |         |         |         |         |         |         |         |         |         |         |         | 105,212 | \$ 105,212.41    |
| Computer - Equipment for Instruction (leased)                                                    |         | 21,861  | 21,861  | 22,523  |         |         |         |         |         |         |         |         | \$ 66,244.85     |
| Computer Lab - Including Software                                                                |         | -       | -       | -       |         |         |         |         |         |         |         |         | \$ -             |
| Sub-Total Instruction                                                                            | -       | 161,029 | 262,872 | 269,155 | 198,637 | 198,637 | 198,637 | 198,637 | 198,637 | 198,637 | 198,637 | 301,850 | \$ 2,387,366.69  |
| <b>Pupil Personnel Services</b>                                                                  |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes counselor, school nurse, health assistant)                                    |         |         | 4,546   | 4,546   | 4,546   | 4,546   | 4,546   | 4,546   | 4,546   | 4,546   | 4,546   | 4,546   | \$ 45,462.15     |
| Fringe Benefits                                                                                  |         |         | 1,091   | 1,091   | 1,091   | 1,091   | 1,091   | 1,091   | 1,091   | 1,091   | 1,091   | 1,091   | \$ 10,910.92     |
| Contracted Professional Services (counseling and psychological)                                  |         |         | 7,154   | 7,154   | 7,154   | 7,154   | 7,154   | 7,154   | 7,154   | 7,154   | 7,154   | 7,154   | \$ 71,544.44     |
| Sub-Total Pupil Personnel Services                                                               | -       | -       | 12,792  | 12,792  | 12,792  | 12,792  | 12,792  | 12,792  | 12,792  | 12,792  | 12,792  | 12,792  | \$ 127,917.50    |
| <b>Media Services</b>                                                                            |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes Librarian)                                                                    |         | 2,017   | 4,236   | 4,236   | 4,236   | 4,236   | 4,236   | 4,236   | 4,236   | 4,236   | 4,236   | 4,236   | \$ 44,379.72     |
| Fringe Benefits                                                                                  |         | 484     | 1,017   | 1,017   | 1,017   | 1,017   | 1,017   | 1,017   | 1,017   | 1,017   | 1,017   | 1,017   | \$ 10,651.13     |
| Library Books                                                                                    |         | -       | -       | -       |         |         |         |         |         |         |         |         | \$ -             |
| Audio Visual Materials                                                                           |         | -       | -       | -       |         |         |         |         |         |         |         |         | \$ -             |
| Sub-Total Media Services                                                                         | -       | 2,501   | 5,253   | 5,253   | 5,253   | 5,253   | 5,253   | 5,253   | 5,253   | 5,253   | 5,253   | 5,253   | \$ 55,030.85     |
| <b>Curriculum Development</b>                                                                    |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes Curriculum Specialist)                                                        |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Fringe Benefits                                                                                  |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Curriculum Planning, Research, Development and Evaluation (part of ESP's Fee)                    | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | \$ 80,862.84     |
| Development Supplies                                                                             |         | -       | -       | -       |         |         |         |         |         |         |         |         | \$ -             |
| Student Activities                                                                               |         | 5,261   | 5,261   |         |         |         |         |         |         |         |         |         | \$ 10,521.24     |
| Sub-Total Curriculum Development                                                                 | 6,722   | 11,983  | 11,983  | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | 6,722   | \$ 91,184.09     |
| <b>Staff Development</b>                                                                         |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Workshops/Trainings                                                                              |         | 19,000  |         |         |         |         |         |         | 19,000  |         |         |         | \$ 38,000.00     |
| Travel                                                                                           |         | -       |         |         |         |         |         |         | -       |         |         |         | \$ -             |
| Professional Services                                                                            |         | -       |         |         |         |         |         |         | -       |         |         |         | \$ -             |
| Sub-Total Staff Development                                                                      | -       | 19,000  | -       | -       | -       | -       | -       | -       | 19,000  | -       | -       | -       | \$ 38,000.00     |
| <b>Instruction Related Technology</b>                                                            |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Salaries (includes Technology Personnel)                                                         |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Fringe Benefits                                                                                  |         | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | -       | \$ -             |
| Software and Scanner                                                                             | 649     | 649     |         |         |         |         |         |         |         |         |         |         | \$ 1,298.92      |
| Hardware Maintenance                                                                             |         | -       |         | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | \$ 14,721.08     |
| Computer Learning Labs                                                                           |         | -       | -       |         |         |         |         |         |         |         |         |         | \$ -             |
| Sub-Total Instruction Related Technology                                                         | -       | 649     | 649     | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | 1,636   | \$ 16,020.00     |
| <b>Board</b>                                                                                     |         |         |         |         |         |         |         |         |         |         |         |         |                  |
| Professional Services (Legal)                                                                    | 2,706   |         |         |         |         |         |         |         |         |         |         |         | \$ 2,706.08      |
| Insurance (General Liability, D&O, Professional Liability)                                       | 8,511   |         |         | 8,511   |         |         | 8,511   |         |         | 8,511   |         |         | \$ 34,042.49     |
| Travel                                                                                           | 2,165   |         |         |         |         |         |         |         |         |         |         |         | \$ 2,164.86      |

## Somerset Parks Academy Charter School

|                                                                            | YEAR 5 |        |        |        |        |        |        |        |        |        |        |        | 100 % Enrollment |
|----------------------------------------------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|------------------|
| <i>Sub-Total Board</i>                                                     | 13,382 | -      | -      | 8,511  | -      | -      | 8,511  | -      | -      | 8,511  | -      | -      | \$ 38,913.44     |
| <b>General Administration</b>                                              |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Management Fees (Portion of the \$450 fee charged by ESP)                  | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | \$ 157,818.61    |
| Administrative Fee                                                         | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| <i>Sub-Total General Administration</i>                                    | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | 13,152 | \$ 157,818.61    |
| <b>School Administration</b>                                               |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (includes Principal, Secretary & other Office Personnel)          | 19,852 | 19,852 | 19,852 | 19,852 | 19,852 | 19,852 | 19,852 | 19,852 | 19,852 | 19,852 | 19,852 | 19,852 | \$ 238,222.84    |
| Fringe Benefits                                                            | 4,764  | 4,764  | 4,764  | 4,764  | 4,764  | 4,764  | 4,764  | 4,764  | 4,764  | 4,764  | 4,764  | 4,764  | \$ 57,173.48     |
| Equipment Rental / Lease                                                   | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | \$ 3,896.76      |
| Travel                                                                     | -      | -      | -      | 2,598  | -      | -      | -      | -      | -      | -      | -      | -      | \$ 2,597.84      |
| Advertising and Promotion                                                  | 1,169  | 1,169  | 1,169  | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ 3,507.08      |
| License Fees                                                               | 216    | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ 216.49        |
| Dues and Subscriptions                                                     | 2,806  | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ 2,805.66      |
| Postage                                                                    | -      | -      | 184    | 184    | 184    | 184    | 184    | 184    | 184    | 184    | 184    | 184    | \$ 1,940.13      |
| Printing                                                                   | 4,140  | 376    | 376    | 376    | 376    | 376    | 376    | 376    | 376    | 376    | 376    | 376    | \$ 8,280.61      |
| Office Supplies                                                            | 4,050  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | 1,105  | \$ 16,200.00     |
| Office Equipment                                                           | 1,624  | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ 1,623.65      |
| Computer Equipment                                                         | 2,165  | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ 2,164.86      |
| <i>Sub-Total School Administration</i>                                     | 41,111 | 27,591 | 27,775 | 29,204 | 26,606 | 26,606 | 26,606 | 26,606 | 26,606 | 26,606 | 26,606 | 26,606 | \$ 338,529.40    |
| <b>Facilities Acquisition &amp; Construction</b>                           |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Building Lease / Rent (see budget summary for calculation)                 | -      | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | \$ 656,396.74    |
| Remodeling & Renovations                                                   | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Purchase of Buildings & Fixed Equipment                                    | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Land                                                                       | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| <i>Sub-Total Facilities Acquisition &amp; Construction</i>                 | -      | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | 59,672 | \$ 656,396.74    |
| <b>Fiscal Services</b>                                                     |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Business Manager, Accounting & Bookkeeping Personnel)            | 3,608  | 3,608  | 3,608  | 3,608  | 3,608  | 3,608  | 3,608  | 3,608  | 3,608  | 3,608  | 3,608  | 3,608  | \$ 43,297.29     |
| Fringe Benefits                                                            | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | 866    | \$ 10,391.35     |
| Fee to County School Board - up to 250 students                            | 7,495  | 7,495  | 7,495  | 7,495  | 7,495  | 7,495  | 7,495  | 7,495  | 7,495  | 7,495  | 7,495  | 7,495  | \$ 89,940.32     |
| Planning, Research, Development and Evaluation (Part of ESP's Fee)         | 6,430  | 6,430  | 6,430  | 6,430  | 6,430  | 6,430  | 6,430  | 6,430  | 6,430  | 6,430  | 6,430  | 6,430  | \$ 77,155.76     |
| Professional Services - Annual Audit                                       | 767    | 767    | 767    | 767    | 767    | 767    | 767    | 767    | 767    | 767    | 767    | 767    | \$ 9,200.67      |
| <i>Sub-Total Fiscal Services</i>                                           | 19,165 | 19,165 | 19,165 | 19,165 | 19,165 | 19,165 | 19,165 | 19,165 | 19,165 | 19,165 | 19,165 | 19,165 | \$ 229,985.40    |
| <b>Food Services</b>                                                       |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Food Service Workers)                                            | -      | -      | 3,031  | 3,031  | 3,031  | 3,031  | 3,031  | 3,031  | 3,031  | 3,031  | 3,031  | 3,031  | \$ 30,308.10     |
| Fringe Benefits                                                            | -      | -      | 727    | 727    | 727    | 727    | 727    | 727    | 727    | 727    | 727    | 727    | \$ 7,273.94      |
| Food                                                                       | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Food, Materials & Supplies - Vendor provided meals 90% Participation       | -      | -      | 27,953 | 27,953 | 27,953 | 27,953 | 27,953 | 27,953 | 27,953 | 27,953 | 27,953 | 27,953 | \$ 279,528.32    |
| Equipment Rental / Lease (provided by food vendor)                         | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Inspection fees                                                            | -      | -      | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | 16     | \$ 162.36        |
| <i>Sub-Total Food Services</i>                                             | -      | -      | 31,727 | 31,727 | 31,727 | 31,727 | 31,727 | 31,727 | 31,727 | 31,727 | 31,727 | 31,727 | \$ 317,272.73    |
| <b>Pupil Transportation Services</b>                                       |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Drivers & Transportation workers)                                | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Fringe Benefits                                                            | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Contracted Transportation Services - \$235 per bus per day 20% utilization | -      | -      | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | \$ 104,400.00    |
| Field Trip Expenses for competitions                                       | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Busies                                                                     | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Repairs & Maintenance                                                      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| Fuel                                                                       | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | -      | \$ -             |
| <i>Sub-Total Pupil Transportation Services</i>                             | -      | -      | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | 10,440 | \$ 104,400.00    |
| <b>Operation of Plant</b>                                                  |        |        |        |        |        |        |        |        |        |        |        |        |                  |
| Salaries (Custodian, crossing guards, security)                            | 3,753  | 3,753  | 3,753  | 3,753  | 3,753  | 3,753  | 3,753  | 3,753  | 3,753  | 3,753  | 3,753  | 3,753  | \$ 45,030.91     |
| Fringe benefits                                                            | 901    | 901    | 901    | 901    | 901    | 901    | 901    | 901    | 901    | 901    | 901    | 901    | \$ 10,807.42     |
| Purchased Service (Custodial, fire and alarm, etc)                         | 7,667  | 7,667  | 7,667  | 7,667  | 7,667  | 7,667  | 7,667  | 7,667  | 7,667  | 7,667  | 7,667  | 7,667  | \$ 92,006.73     |
| Lawn Maintenance                                                           | 613    | 613    | 613    | 613    | 613    | 613    | 613    | 613    | 613    | 613    | 613    | 613    | \$ 7,360.54      |
| Pest Control                                                               | 123    | 123    | 123    | 123    | 123    | 123    | 123    | 123    | 123    | 123    | 123    | 123    | \$ 1,472.11      |
| Security Services                                                          | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | \$ 3,896.76      |
| Property Insurance                                                         | 7,361  | 7,361  | 7,361  | 7,361  | 7,361  | 7,361  | 7,361  | 7,361  | 7,361  | 7,361  | 7,361  | 7,361  | \$ 88,326.46     |
| Telephone Services                                                         | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | 325    | \$ 3,896.76      |

## Somerset Parks Academy Charter School

|                                                                          |               |               |                |                |               |               |               |               |               |               |               |                 | YEAR 5           |
|--------------------------------------------------------------------------|---------------|---------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|------------------|
|                                                                          |               |               |                |                |               |               |               |               |               |               |               |                 | 100 % Enrollment |
| Water & Sewer                                                            | 245           | 245           | 245            | 245            | 245           | 245           | 245           | 245           | 245           | 245           | 245           | 245             | \$ 2,944.22      |
| Electricity                                                              | 7,974         | 7,974         | 7,974          | 7,974          | 7,974         | 7,974         | 7,974         | 7,974         | 7,974         | 7,974         | 7,974         | 7,974           | \$ 95,687.00     |
| Custodial Supplies & Equipment                                           | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <i>Sub-Total Operation of Plant</i>                                      | 29,286        | 29,286        | 29,286         | 29,286         | 29,286        | 29,286        | 29,286        | 29,286        | 29,286        | 29,286        | 29,286        | 29,286          | \$ 351,428.90    |
| <b>Maintenance of Plant</b>                                              |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Repairs & Maintenance                                                    |               | 4,595         | 4,595          | 4,595          | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595           | \$ 50,544.00     |
| Supplies                                                                 | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <i>Sub-Total Maintenance of Plant</i>                                    | -             | 4,595         | 4,595          | 4,595          | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595         | 4,595           | \$ 50,544.00     |
| <b>Administrative Technology Services</b>                                |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Internal Technology Support                                              | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Technology Personnel                                                     | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Systems Operation                                                        | 2,300         | 2,300         | 2,300          | 2,300          | 2,300         | 2,300         | 2,300         | 2,300         | 2,300         | 2,300         | 2,300         | 2,300           | \$ 27,602.02     |
| Systems Planning & Analysis                                              | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <i>Sub-Total Administrative Technology Services</i>                      | 2,300         | 2,300         | 2,300          | 2,300          | 2,300         | 2,300         | 2,300         | 2,300         | 2,300         | 2,300         | 2,300         | 2,300           | \$ 27,602.02     |
| <b>After Care Programs</b>                                               |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| After Care Salary                                                        | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Fringe Benefits                                                          | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <i>Sub-Total After Care Programs</i>                                     | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <b>Debt Service</b>                                                      |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Redemption of Principal                                                  | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| Interest (Interest Only at 6%)                                           | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <i>Sub-Total Debt Service</i>                                            | -             | -             | -              | -              | -             | -             | -             | -             | -             | -             | -             | -               | \$ -             |
| <b>Contingency</b>                                                       |               |               |                |                |               |               |               |               |               |               |               |                 |                  |
| Operating expense contingency - 3% of FEFP - Considered restricted funds |               |               |                |                |               |               |               |               |               |               |               | 156,460         | \$ 156,460.21    |
| <i>Sub-Total Contingency</i>                                             |               |               |                |                |               |               |               |               |               |               |               | 156,460         | \$ 156,460.21    |
| <b>Total Expenditures</b>                                                | \$ 125,117.46 | \$ 350,923.42 | \$ 491,661.65  | \$ 503,609.22  | \$ 421,983.12 | \$ 421,983.12 | \$ 430,493.74 | \$ 421,983.12 | \$ 440,983.12 | \$ 430,493.74 | \$ 421,983.12 | \$ 683,655.74   | \$ 5,144,870.57  |
| <b>Excess of Revenues over Expenditures</b>                              | \$ 579,092.20 | \$ 40,017.19  | \$ (66,783.73) | \$ (58,211.30) | \$ 23,414.80  | \$ 23,414.80  | \$ 14,904.18  | \$ 23,414.80  | \$ 4,414.80   | \$ 14,904.18  | \$ 23,414.80  | \$ (238,257.82) | \$ 383,738.92    |
| <b>Fund Balance</b>                                                      | \$ 579,092.20 | \$ 619,109.39 | \$ 552,325.67  | \$ 494,114.37  | \$ 517,529.17 | \$ 540,943.97 | \$ 555,848.15 | \$ 579,262.96 | \$ 583,677.76 | \$ 598,581.94 | \$ 621,996.74 | \$ 383,738.92   |                  |

## Revenue Estimate Worksheet for Somerset Parks Academy Charter School

Based on the 2015-16 FEFP Conference Report

School District:

Broward

## 1. 2015-16 FEFP State and Local Funding

Base Student Allocation

\$4,154.45

District Cost Differential: 1.0254

| Program                            | Number of FTE | Program Cost Factor | Weighted FTE<br>(2) x (3) | 2015-16<br>Base Funding<br>(WFTE x BSA x DCD) |                  |
|------------------------------------|---------------|---------------------|---------------------------|-----------------------------------------------|------------------|
|                                    |               |                     |                           | (4)                                           | (5)              |
| 101 Basic K-3                      | 305.00        | 1.115               | 340.0750                  | \$                                            | 1,448,710        |
| 111 Basic K-3 with ESE Services    | 47.00         | 1.115               | 52.4050                   | \$                                            | 223,244          |
| 102 Basic 4-8                      | 0.00          | 1.000               | 0.0000                    | \$                                            | -                |
| 112 Basic 4-8 with ESE Services    | 0.00          | 1.000               | 0.0000                    | \$                                            | -                |
| 103 Basic 9-12                     | 0.00          | 1.005               | 0.0000                    | \$                                            | -                |
| 113 Basic 9-12 with ESE Services   | 0.00          | 1.005               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level PK-3) |               | 3.613               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level 4-8)  |               | 3.613               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level 9-12) |               | 3.613               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level PK-3) |               | 5.258               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level 4-8)  |               | 5.258               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level 9-12) |               | 5.258               | 0.0000                    | \$                                            | -                |
| 130 ESOL (Grade Level PK-3)        | 43.00         | 1.180               | 50.7400                   | \$                                            | 216,151          |
| 130 ESOL (Grade Level 4-8)         | 0.00          | 1.180               | 0.0000                    | \$                                            | -                |
| 130 ESOL (Grade Level 9-12)        | 0.00          | 1.180               | 0.0000                    | \$                                            | -                |
| 300 Career Education (Grades 9-12) |               | 1.005               | 0.0000                    | \$                                            | -                |
| <b>Totals</b>                      | <b>395.00</b> |                     | <b>443.2200</b>           | <b>\$</b>                                     | <b>1,888,105</b> |

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

| Additional FTE (a)                  | Number of FTE   | 2015-16<br>Base Funding<br>(WFTE x BSA x DCD) |                     |
|-------------------------------------|-----------------|-----------------------------------------------|---------------------|
|                                     |                 |                                               |                     |
| Advanced Placement                  |                 | \$                                            | -                   |
| International Baccalaureate         |                 | \$                                            | -                   |
| Advanced International Certificate  |                 | \$                                            | -                   |
| Industry Certified Career Education |                 | \$                                            | -                   |
| Early High School Graduation        |                 | \$                                            | -                   |
| Small District ESE Supplement       |                 | \$                                            | -                   |
| <b>Total Additional FTE</b>         | <b>0.0000</b>   | <b>Additional Base Funds</b>                  | <b>\$ -</b>         |
| <b>Total Funded Weighted FTE</b>    | <b>443.2200</b> | <b>Total Base Funding</b>                     | <b>\$ 1,888,105</b> |

| 2. ESE Guaranteed Allocation:                                                                                                                          | FTE          | Grade Level | Matrix Level | Guarantee Per Student      |                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------|--------------|----------------------------|------------------|
|                                                                                                                                                        |              |             |              |                            |                  |
|                                                                                                                                                        | 47.00        | PK-3        | 251          | \$ 1,058                   | \$ 49,726        |
| Additional Funding from the ESE                                                                                                                        |              | PK-3        | 252          | \$ 3,418                   | \$ -             |
| Guaranteed Allocation. Enter the FTE from 111,112 and 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. | 0.00         | PK-3        | 253          | \$ 6,974                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 251          | \$ 1,187                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 252          | \$ 3,546                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 253          | \$ 7,102                   | \$ -             |
| This total should equal all FTE from programs 111, 112 and 113 above.                                                                                  | 0.00         | 9-12        | 251          | \$ 845                     | \$ -             |
|                                                                                                                                                        |              | 9-12        | 252          | \$ 3,204                   | \$ -             |
|                                                                                                                                                        |              | 9-12        | 253          | \$ 6,760                   | \$ -             |
| <b>Total FTE with ESE Services</b>                                                                                                                     | <b>47.00</b> |             |              | <b>Total ESE Guarantee</b> | <b>\$ 49,726</b> |

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 395.00 ÷ District's Total UFTE: 267,112.97  
= 0.1479%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 443.22 ÷ District's Total WFTE: 289,621.53  
= 0.1530%

|                                                                            |        |                   |   |         |    |               |
|----------------------------------------------------------------------------|--------|-------------------|---|---------|----|---------------|
| 4. Supplemental Academic Instruction (UFTE share)                          | (b)    | <u>53,972,820</u> | x | 0.1479% | \$ | <u>79,826</u> |
| 5. Discretionary Millage Compression Allocation<br>.748 Mills (UFTE share) | (b)    | <u>0</u>          | x | 0.1479% | \$ | <u>-</u>      |
| 6. Digital Classrooms Allocation (UFTE share)                              | (b)(d) | <u>4,317,610</u>  | x | 0.1479% | \$ | <u>6,386</u>  |
| 7. Safe Schools Allocation (UFTE share)                                    | (b)    | <u>5,896,615</u>  | x | 0.1479% | \$ | <u>8,721</u>  |
| 8. Instructional Materials Allocation (UFTE share)                         | (b)    | <u>20,437,009</u> | x | 0.1479% | \$ | <u>30,226</u> |
| Dual Enrollment Instructional Materials Allocation                         | (e)    |                   |   |         |    |               |
| ESE Applications Allocation:                                               |        |                   |   |         |    |               |

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

|                                               |     |                    |   |         |    |                |
|-----------------------------------------------|-----|--------------------|---|---------|----|----------------|
| 9. Declining Enrollment (WFTE share)          | (c) | <u>0</u>           | x | 0.1530% | \$ | <u>-</u>       |
| 10. Sparsity Supplement (WFTE share)          | (c) | <u>0</u>           | x | 0.1530% | \$ | <u>-</u>       |
| 11. Discretionary Local Effort (WFTE share)   | (c) | <u>116,732,452</u> | x | 0.1530% | \$ | <u>178,601</u> |
| 12. Proration to Funds Available (WFTE share) | (c) | <u>0</u>           | x | 0.1530% | \$ | <u>-</u>       |
| 13. Discretionary Lottery (WFTE share)        | (c) | <u>980,408</u>     | x | 0.1530% | \$ | <u>1,500</u>   |

14. Class Size Reduction Funds:

|         | Weighted FTE (not including Add-On) X | DCD    | X Allocation factors             |    |                |
|---------|---------------------------------------|--------|----------------------------------|----|----------------|
| PK - 3  | 443.2200                              | 1.0254 | 1,313.27                         | =  | <u>596,852</u> |
| 4-8     | 0.0000                                | 1.0254 | 895.79                           | =  | <u>0</u>       |
| 9-12    | 0.0000                                | 1.0254 | 897.95                           | =  | <u>0</u>       |
| Total * | <u>443.2200</u>                       |        | Total Class Size Reduction Funds | \$ | <u>596,852</u> |

(\*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

|                                    |     |           |   |       |    |               |
|------------------------------------|-----|-----------|---|-------|----|---------------|
| 15. Student Transportation         | (f) |           |   |       |    |               |
| Enter All Adjusted Fundable Riders |     | <u>79</u> | x | 366   | \$ | <u>28,914</u> |
| Enter All Adjusted ESE Riders      |     |           | x | 1,373 | \$ | <u>-</u>      |

16. Federally Connected Student Supplement

(g)

| Impact Aid Student Type    | Number of Students | Exempt Property Allocation | Impact Aide Student Allocation | Total |
|----------------------------|--------------------|----------------------------|--------------------------------|-------|
| Military and Indian Lands  |                    | \$0.00                     | \$0.00                         | \$ -  |
| Civilians on Federal Lands |                    | \$0.00                     | \$0.00                         | \$ -  |
| Students with Disabilities |                    |                            | \$0.00                         | \$ -  |
| Total                      |                    |                            |                                | \$ -  |

17. Florida Teachers Classroom Supply Assistance Program

(h)

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

(i)

Total \$ 2,868,857

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

(j)

If you have more than a 75% ESE student population, please place a 1 in the following box: ☐ \$ -

Average Revenue per Student: \$ 7,263

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(1)(i), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

- (g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.
- (h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.
- (i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.
- (j) Consistent with s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated based on unweighted full-time equivalent students.

Administrative fees:

*Administrative fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 5%.*

*For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 2%.*

Other:

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*

## Revenue Estimate Worksheet for Somerset Parks Academy Charter School

Based on the 2015-16 FEFP Conference Report

School District:

Broward

## 1. 2015-16 FEFP State and Local Funding

Base Student Allocation

\$4,154.45

District Cost Differential: 1.0254

| Program                            | Number of FTE | Program Cost Factor | Weighted FTE<br>(2) x (3) | 2015-16<br>Base Funding<br>(WFTE x BSA x DCD) |                  |
|------------------------------------|---------------|---------------------|---------------------------|-----------------------------------------------|------------------|
|                                    |               |                     |                           | (4)                                           | (5)              |
| 101 Basic K-3                      | 330.00        | 1.115               | 367.9500                  | \$                                            | 1,567,457        |
| 111 Basic K-3 with ESE Services    | 51.00         | 1.115               | 56.8650                   | \$                                            | 242,243          |
| 102 Basic 4-8                      | 67.00         | 1.000               | 67.0000                   | \$                                            | 285,418          |
| 112 Basic 4-8 with ESE Services    | 10.00         | 1.000               | 10.0000                   | \$                                            | 42,600           |
| 103 Basic 9-12                     | 0.00          | 1.005               | 0.0000                    | \$                                            | -                |
| 113 Basic 9-12 with ESE Services   | 0.00          | 1.005               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level PK-3) |               | 3.613               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level 4-8)  |               | 3.613               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level 9-12) |               | 3.613               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level PK-3) |               | 5.258               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level 4-8)  |               | 5.258               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level 9-12) |               | 5.258               | 0.0000                    | \$                                            | -                |
| 130 ESOL (Grade Level PK-3)        | 47.00         | 1.180               | 55.4600                   | \$                                            | 236,258          |
| 130 ESOL (Grade Level 4-8)         | 10.00         | 1.180               | 11.8000                   | \$                                            | 50,268           |
| 130 ESOL (Grade Level 9-12)        | 0.00          | 1.180               | 0.0000                    | \$                                            | -                |
| 300 Career Education (Grades 9-12) |               | 1.005               | 0.0000                    | \$                                            | -                |
| <b>Totals</b>                      | <b>515.00</b> |                     | <b>569.0750</b>           | <b>\$</b>                                     | <b>2,424,244</b> |

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

| Additional FTE (a)                  | Number of FTE   | 2015-16<br>Base Funding<br>(WFTE x BSA x DCD) |                     |
|-------------------------------------|-----------------|-----------------------------------------------|---------------------|
|                                     |                 |                                               |                     |
| Advanced Placement                  |                 | \$                                            | -                   |
| International Baccalaureate         |                 | \$                                            | -                   |
| Advanced International Certificate  |                 | \$                                            | -                   |
| Industry Certified Career Education |                 | \$                                            | -                   |
| Early High School Graduation        |                 | \$                                            | -                   |
| Small District ESE Supplement       |                 | \$                                            | -                   |
| <b>Total Additional FTE</b>         | <b>0.0000</b>   | <b>Additional Base Funds</b>                  | <b>\$ -</b>         |
| <b>Total Funded Weighted FTE</b>    | <b>569.0750</b> | <b>Total Base Funding</b>                     | <b>\$ 2,424,244</b> |

| 2. ESE Guaranteed Allocation:                                                                                                                          | FTE          | Grade Level | Matrix Level | Guarantee Per Student      |                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------|--------------|----------------------------|------------------|
|                                                                                                                                                        |              |             |              |                            |                  |
| Additional Funding from the ESE                                                                                                                        | 51.00        | PK-3        | 251          | \$ 1,058                   | \$ 53,958        |
| Guaranteed Allocation. Enter the FTE from 111,112 and 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. |              | PK-3        | 252          | \$ 3,418                   | \$ -             |
|                                                                                                                                                        |              | PK-3        | 253          | \$ 6,974                   | \$ -             |
|                                                                                                                                                        | 10.00        | 4-8         | 251          | \$ 1,187                   | \$ 11,870        |
|                                                                                                                                                        |              | 4-8         | 252          | \$ 3,546                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 253          | \$ 7,102                   | \$ -             |
| This total should equal all FTE from programs 111, 112 and 113 above.                                                                                  | 0.00         | 9-12        | 251          | \$ 845                     | \$ -             |
|                                                                                                                                                        |              | 9-12        | 252          | \$ 3,204                   | \$ -             |
|                                                                                                                                                        |              | 9-12        | 253          | \$ 6,760                   | \$ -             |
| <b>Total FTE with ESE Services</b>                                                                                                                     | <b>61.00</b> |             |              | <b>Total ESE Guarantee</b> | <b>\$ 65,828</b> |

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 515.00 ÷ District's Total UFTE: 267,112.97 = 0.1928%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 569.08 ÷ District's Total WFTE: 289,621.53 = 0.1965%

|                                                                            |        |                   |   |         |    |                |
|----------------------------------------------------------------------------|--------|-------------------|---|---------|----|----------------|
| 4. Supplemental Academic Instruction (UFTE share)                          | (b)    | <u>53,972,820</u> | x | 0.1928% | \$ | <u>104,060</u> |
| 5. Discretionary Millage Compression Allocation<br>.748 Mills (UFTE share) | (b)    | <u>0</u>          | x | 0.1928% | \$ | <u>-</u>       |
| 6. Digital Classrooms Allocation (UFTE share)                              | (b)(d) | <u>4,317,610</u>  | x | 0.1928% | \$ | <u>8,324</u>   |
| 7. Safe Schools Allocation (UFTE share)                                    | (b)    | <u>5,896,615</u>  | x | 0.1928% | \$ | <u>11,369</u>  |
| 8. Instructional Materials Allocation (UFTE share)                         | (b)    | <u>20,437,009</u> | x | 0.1928% | \$ | <u>39,403</u>  |
| Dual Enrollment Instructional Materials Allocation                         | (e)    |                   |   |         |    |                |
| ESE Applications Allocation:                                               |        |                   |   |         |    |                |

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

|                                               |     |                    |   |         |    |                |
|-----------------------------------------------|-----|--------------------|---|---------|----|----------------|
| 9. Declining Enrollment (WFTE share)          | (c) | <u>0</u>           | x | 0.1965% | \$ | <u>-</u>       |
| 10. Sparsity Supplement (WFTE share)          | (c) | <u>0</u>           | x | 0.1965% | \$ | <u>-</u>       |
| 11. Discretionary Local Effort (WFTE share)   | (c) | <u>116,732,452</u> | x | 0.1965% | \$ | <u>229,379</u> |
| 12. Proration to Funds Available (WFTE share) | (c) | <u>0</u>           | x | 0.1965% | \$ | <u>-</u>       |
| 13. Discretionary Lottery (WFTE share)        | (c) | <u>980,408</u>     | x | 0.1965% | \$ | <u>1,927</u>   |

14. Class Size Reduction Funds:

|         | Weighted FTE (not including Add-On) X | DCD    | X Allocation factors             |    |                |
|---------|---------------------------------------|--------|----------------------------------|----|----------------|
| PK - 3  | 480.2750                              | 1.0254 | 1,313.27                         | =  | <u>646,751</u> |
| 4-8     | 88.8000                               | 1.0254 | 895.79                           | =  | <u>81,567</u>  |
| 9-12    | 0.0000                                | 1.0254 | 897.95                           | =  | <u>0</u>       |
| Total * | <u>569.0750</u>                       |        | Total Class Size Reduction Funds | \$ | <u>728,318</u> |

(\*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

|                                    |     |            |   |       |    |               |
|------------------------------------|-----|------------|---|-------|----|---------------|
| 15. Student Transportation         | (f) |            |   |       |    |               |
| Enter All Adjusted Fundable Riders |     | <u>103</u> | x | 366   | \$ | <u>37,698</u> |
| Enter All Adjusted ESE Riders      |     |            | x | 1,373 | \$ | <u>-</u>      |

16. Federally Connected Student Supplement

(g)

| Impact Aid Student Type    | Number of Students | Exempt Property Allocation | Impact Aide Student Allocation | Total |
|----------------------------|--------------------|----------------------------|--------------------------------|-------|
| Military and Indian Lands  |                    | \$0.00                     | \$0.00                         | \$ -  |
| Civilians on Federal Lands |                    | \$0.00                     | \$0.00                         | \$ -  |
| Students with Disabilities |                    |                            | \$0.00                         | \$ -  |
| Total                      |                    |                            |                                | \$ -  |

17. Florida Teachers Classroom Supply Assistance Program

(h)

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

(i)

Total \$ 3,650,550

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

(j)

|                                                                                            |  |    |          |
|--------------------------------------------------------------------------------------------|--|----|----------|
| If you have more than a 75% ESE student population, please place a 1 in the following box: |  | \$ | <u>-</u> |
| Average Revenue per Student:                                                               |  | \$ | 7,088    |
| Revenue Increase from Previous Year                                                        |  |    | 1%       |
| Adjusted Revenue Per Student                                                               |  | \$ | 7,159.33 |

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(1)(i), F.S.



(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated based on unweighted full-time equivalent students.

Administrative fees:

*Administrative fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 5%.*

*For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 2%.*

Other:

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*

## Revenue Estimate Worksheet for Somerset Parks Academy Charter School

Based on the 2015-16 FEFP Conference Report

School District:

Broward

## 1. 2015-16 FEFP State and Local Funding

Base Student Allocation

\$4,154.45

District Cost Differential: 1.0254

| Program                            | Number of FTE | Program Cost Factor | Weighted FTE<br>(2) x (3) | 2015-16<br>Base Funding<br>(WFTE x BSA x DCD) |                  |
|------------------------------------|---------------|---------------------|---------------------------|-----------------------------------------------|------------------|
|                                    |               |                     |                           | (4)                                           | (5)              |
| 101 Basic K-3                      | 331.00        | 1.115               | 369.0650                  | \$                                            | 1,572,207        |
| 111 Basic K-3 with ESE Services    | 51.00         | 1.115               | 56.8650                   | \$                                            | 242,243          |
| 102 Basic 4-8                      | 150.00        | 1.000               | 150.0000                  | \$                                            | 638,996          |
| 112 Basic 4-8 with ESE Services    | 24.00         | 1.000               | 24.0000                   | \$                                            | 102,239          |
| 103 Basic 9-12                     | 0.00          | 1.005               | 0.0000                    | \$                                            | -                |
| 113 Basic 9-12 with ESE Services   | 0.00          | 1.005               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level PK-3) |               | 3.613               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level 4-8)  |               | 3.613               | 0.0000                    | \$                                            | -                |
| 254 ESE Level 4 (Grade Level 9-12) |               | 3.613               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level PK-3) |               | 5.258               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level 4-8)  |               | 5.258               | 0.0000                    | \$                                            | -                |
| 255 ESE Level 5 (Grade Level 9-12) |               | 5.258               | 0.0000                    | \$                                            | -                |
| 130 ESOL (Grade Level PK-3)        | 47.00         | 1.180               | 55.4600                   | \$                                            | 236,258          |
| 130 ESOL (Grade Level 4-8)         | 22.00         | 1.180               | 25.9600                   | \$                                            | 110,589          |
| 130 ESOL (Grade Level 9-12)        | 0.00          | 1.180               | 0.0000                    | \$                                            | -                |
| 300 Career Education (Grades 9-12) |               | 1.005               | 0.0000                    | \$                                            | -                |
| <b>Totals</b>                      | <b>625.00</b> |                     | <b>681.3500</b>           | <b>\$</b>                                     | <b>2,902,532</b> |

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

| Additional FTE (a)                  | Number of FTE   | 2015-16<br>Base Funding<br>(WFTE x BSA x DCD) |                     |
|-------------------------------------|-----------------|-----------------------------------------------|---------------------|
|                                     |                 |                                               |                     |
| Advanced Placement                  |                 | \$                                            | -                   |
| International Baccalaureate         |                 | \$                                            | -                   |
| Advanced International Certificate  |                 | \$                                            | -                   |
| Industry Certified Career Education |                 | \$                                            | -                   |
| Early High School Graduation        |                 | \$                                            | -                   |
| Small District ESE Supplement       |                 | \$                                            | -                   |
| <b>Total Additional FTE</b>         | <b>0.0000</b>   | <b>Additional Base Funds</b>                  | <b>\$ -</b>         |
| <b>Total Funded Weighted FTE</b>    | <b>681.3500</b> | <b>Total Base Funding</b>                     | <b>\$ 2,902,532</b> |

| 2. ESE Guaranteed Allocation:                                                                                                                          | FTE          | Grade Level | Matrix Level | Guarantee Per Student      |                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------|--------------|----------------------------|------------------|
|                                                                                                                                                        |              |             |              |                            |                  |
| Additional Funding from the ESE                                                                                                                        | 51.00        | PK-3        | 251          | \$ 1,058                   | \$ 53,958        |
| Guaranteed Allocation. Enter the FTE from 111,112 and 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. |              | PK-3        | 252          | \$ 3,418                   | \$ -             |
|                                                                                                                                                        |              | PK-3        | 253          | \$ 6,974                   | \$ -             |
|                                                                                                                                                        | 24.00        | 4-8         | 251          | \$ 1,187                   | \$ 28,488        |
|                                                                                                                                                        |              | 4-8         | 252          | \$ 3,546                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 253          | \$ 7,102                   | \$ -             |
| This total should equal all FTE from programs 111, 112 and 113 above.                                                                                  | 0.00         | 9-12        | 251          | \$ 845                     | \$ -             |
|                                                                                                                                                        |              | 9-12        | 252          | \$ 3,204                   | \$ -             |
|                                                                                                                                                        |              | 9-12        | 253          | \$ 6,760                   | \$ -             |
| <b>Total FTE with ESE Services</b>                                                                                                                     | <b>75.00</b> |             |              | <b>Total ESE Guarantee</b> | <b>\$ 82,446</b> |

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 625.00 ÷ District's Total UFTE: 267,112.97 = 0.2340%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 681.35 ÷ District's Total WFTE: 289,621.53 = 0.2353%

|                                                                            |        |                   |   |         |    |                |
|----------------------------------------------------------------------------|--------|-------------------|---|---------|----|----------------|
| 4. Supplemental Academic Instruction (UFTE share)                          | (b)    | <u>53,972,820</u> | x | 0.2340% | \$ | <u>126,296</u> |
| 5. Discretionary Millage Compression Allocation<br>.748 Mills (UFTE share) | (b)    | <u>0</u>          | x | 0.2340% | \$ | <u>-</u>       |
| 6. Digital Classrooms Allocation (UFTE share)                              | (b)(d) | <u>4,317,610</u>  | x | 0.2340% | \$ | <u>10,103</u>  |
| 7. Safe Schools Allocation (UFTE share)                                    | (b)    | <u>5,896,615</u>  | x | 0.2340% | \$ | <u>13,798</u>  |
| 8. Instructional Materials Allocation (UFTE share)                         | (b)    | <u>20,437,009</u> | x | 0.2340% | \$ | <u>47,823</u>  |
| Dual Enrollment Instructional Materials Allocation                         | (e)    |                   |   |         |    |                |
| ESE Applications Allocation:                                               |        |                   |   |         |    |                |

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

|                                               |     |                    |   |         |    |                |
|-----------------------------------------------|-----|--------------------|---|---------|----|----------------|
| 9. Declining Enrollment (WFTE share)          | (c) | <u>0</u>           | x | 0.2353% | \$ | <u>-</u>       |
| 10. Sparsity Supplement (WFTE share)          | (c) | <u>0</u>           | x | 0.2353% | \$ | <u>-</u>       |
| 11. Discretionary Local Effort (WFTE share)   | (c) | <u>116,732,452</u> | x | 0.2353% | \$ | <u>274,671</u> |
| 12. Proration to Funds Available (WFTE share) | (c) | <u>0</u>           | x | 0.2353% | \$ | <u>-</u>       |
| 13. Discretionary Lottery (WFTE share)        | (c) | <u>980,408</u>     | x | 0.2353% | \$ | <u>2,307</u>   |

14. Class Size Reduction Funds:

|         | Weighted FTE (not including Add-On) X | DCD    | X Allocation factors             |    |                |
|---------|---------------------------------------|--------|----------------------------------|----|----------------|
| PK - 3  | 481.3900                              | 1.0254 | 1,313.27                         | =  | 648,253        |
| 4-8     | 199.9600                              | 1.0254 | 895.79                           | =  | 183,672        |
| 9-12    | 0.0000                                | 1.0254 | 897.95                           | =  | 0              |
| Total * | <u>681.3500</u>                       |        | Total Class Size Reduction Funds | \$ | <u>831,925</u> |

(\*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

|                                    |     |            |   |       |    |               |
|------------------------------------|-----|------------|---|-------|----|---------------|
| 15. Student Transportation         | (f) |            |   |       |    |               |
| Enter All Adjusted Fundable Riders |     | <u>125</u> | x | 366   | \$ | <u>45,750</u> |
| Enter All Adjusted ESE Riders      |     |            | x | 1,373 | \$ | <u>-</u>      |

16. Federally Connected Student Supplement

(g)

| Impact Aid Student Type    | Number of Students | Exempt Property Allocation | Impact Aide Student Allocation | Total |
|----------------------------|--------------------|----------------------------|--------------------------------|-------|
| Military and Indian Lands  |                    | \$0.00                     | \$0.00                         | \$ -  |
| Civilians on Federal Lands |                    | \$0.00                     | \$0.00                         | \$ -  |
| Students with Disabilities |                    |                            | \$0.00                         | \$ -  |
| Total                      |                    |                            |                                | \$ -  |

17. Florida Teachers Classroom Supply Assistance Program

(h)

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

(i)

Total \$ 4,337,651

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

(j)

|                                                                                            |  |    |                 |
|--------------------------------------------------------------------------------------------|--|----|-----------------|
| If you have more than a 75% ESE student population, please place a 1 in the following box: |  | \$ | <u>-</u>        |
| Average Revenue per Student:                                                               |  | \$ | <u>6,940</u>    |
| Revenue Increase from Previous Year                                                        |  |    | <u>1%</u>       |
| Adjusted Revenue Per Student                                                               |  | \$ | <u>7,079.74</u> |

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(l)(i), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated based on unweighted full-time equivalent students.

**Administrative fees:**

*Administrative fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 5%.*

*For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 2%.*

**Other:**

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*

## Revenue Estimate Worksheet for Somerset Parks Academy Charter School

Based on the 2015-16 FEFP Conference Report

School District:

Broward

## 1. 2015-16 FEFP State and Local Funding

Base Student Allocation

\$4,154.45

District Cost Differential: 1.0254

| Program                            | Number of FTE | Program Cost Factor | Weighted FTE<br>(2) x (3) | 2015-16<br>Base Funding |                  |
|------------------------------------|---------------|---------------------|---------------------------|-------------------------|------------------|
|                                    |               |                     |                           | (WFTE x BSA x DCD)      |                  |
| (1)                                | (2)           | (3)                 | (4)                       | (5)                     |                  |
| 101 Basic K-3                      | 330.00        | 1.115               | 367.9500                  | \$                      | 1,567,457        |
| 111 Basic K-3 with ESE Services    | 52.00         | 1.115               | 57.9800                   | \$                      | 246,993          |
| 102 Basic 4-8                      | 169.00        | 1.000               | 169.0000                  | \$                      | 719,935          |
| 112 Basic 4-8 with ESE Services    | 26.00         | 1.000               | 26.0000                   | \$                      | 110,759          |
| 103 Basic 9-12                     | 0.00          | 1.005               | 0.0000                    | \$                      | -                |
| 113 Basic 9-12 with ESE Services   | 0.00          | 1.005               | 0.0000                    | \$                      | -                |
| 254 ESE Level 4 (Grade Level PK-3) |               | 3.613               | 0.0000                    | \$                      | -                |
| 254 ESE Level 4 (Grade Level 4-8)  |               | 3.613               | 0.0000                    | \$                      | -                |
| 254 ESE Level 4 (Grade Level 9-12) |               | 3.613               | 0.0000                    | \$                      | -                |
| 255 ESE Level 5 (Grade Level PK-3) |               | 5.258               | 0.0000                    | \$                      | -                |
| 255 ESE Level 5 (Grade Level 4-8)  |               | 5.258               | 0.0000                    | \$                      | -                |
| 255 ESE Level 5 (Grade Level 9-12) |               | 5.258               | 0.0000                    | \$                      | -                |
| 130 ESOL (Grade Level PK-3)        | 47.00         | 1.180               | 55.4600                   | \$                      | 236,258          |
| 130 ESOL (Grade Level 4-8)         | 24.00         | 1.180               | 28.3200                   | \$                      | 120,642          |
| 130 ESOL (Grade Level 9-12)        | 0.00          | 1.180               | 0.0000                    | \$                      | -                |
| 300 Career Education (Grades 9-12) |               | 1.005               | 0.0000                    | \$                      | -                |
| <b>Totals</b>                      | <b>648.00</b> |                     | <b>704.7100</b>           | <b>\$</b>               | <b>3,002,044</b> |

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

| Additional FTE (a)                  | Number of FTE   | 2015-16<br>Base Funding      |                     |
|-------------------------------------|-----------------|------------------------------|---------------------|
|                                     |                 | (WFTE x BSA x DCD)           |                     |
| Advanced Placement                  |                 | \$                           | -                   |
| International Baccalaureate         |                 | \$                           | -                   |
| Advanced International Certificate  |                 | \$                           | -                   |
| Industry Certified Career Education |                 | \$                           | -                   |
| Early High School Graduation        |                 | \$                           | -                   |
| Small District ESE Supplement       |                 | \$                           | -                   |
| <b>Total Additional FTE</b>         | <b>0.0000</b>   | <b>Additional Base Funds</b> | <b>\$ -</b>         |
| <b>Total Funded Weighted FTE</b>    | <b>704.7100</b> | <b>Total Base Funding</b>    | <b>\$ 3,002,044</b> |

| 2. ESE Guaranteed Allocation:                                                                                                                          | FTE          | Grade Level | Matrix Level | Guarantee Per Student      |                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------|--------------|----------------------------|------------------|
|                                                                                                                                                        |              |             |              |                            |                  |
|                                                                                                                                                        | 52.00        | PK-3        | 251          | \$ 1,058                   | \$ 55,016        |
| Additional Funding from the ESE                                                                                                                        |              | PK-3        | 252          | \$ 3,418                   | \$ -             |
| Guaranteed Allocation. Enter the FTE from 111,112 and 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. | 26.00        | PK-3        | 253          | \$ 6,974                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 251          | \$ 1,187                   | \$ 30,862        |
|                                                                                                                                                        |              | 4-8         | 252          | \$ 3,546                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 253          | \$ 7,102                   | \$ -             |
| This total should equal all FTE from programs 111, 112 and 113 above.                                                                                  | 0.00         | 9-12        | 251          | \$ 845                     | \$ -             |
|                                                                                                                                                        |              | 9-12        | 252          | \$ 3,204                   | \$ -             |
|                                                                                                                                                        |              | 9-12        | 253          | \$ 6,760                   | \$ -             |
| <b>Total FTE with ESE Services</b>                                                                                                                     | <b>78.00</b> |             |              | <b>Total ESE Guarantee</b> | <b>\$ 85,878</b> |

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 648.00 ÷ District's Total UFTE: 267,112.97 = 0.2426%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 704.71 ÷ District's Total WFTE: 289,621.53 = 0.2433%

|                                                                            |        |                   |   |         |    |                |
|----------------------------------------------------------------------------|--------|-------------------|---|---------|----|----------------|
| 4. Supplemental Academic Instruction (UFTE share)                          | (b)    | <u>53,972,820</u> | x | 0.2426% | \$ | <u>130,938</u> |
| 5. Discretionary Millage Compression Allocation<br>.748 Mills (UFTE share) | (b)    | <u>0</u>          | x | 0.2426% | \$ | <u>-</u>       |
| 6. Digital Classrooms Allocation (UFTE share)                              | (b)(d) | <u>4,317,610</u>  | x | 0.2426% | \$ | <u>10,475</u>  |
| 7. Safe Schools Allocation (UFTE share)                                    | (b)    | <u>5,896,615</u>  | x | 0.2426% | \$ | <u>14,305</u>  |
| 8. Instructional Materials Allocation (UFTE share)                         | (b)    | <u>20,437,009</u> | x | 0.2426% | \$ | <u>49,580</u>  |
| Dual Enrollment Instructional Materials Allocation                         | (e)    |                   |   |         |    |                |
| ESE Applications Allocation:                                               |        |                   |   |         |    |                |

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

|                                               |     |                    |   |         |    |                |
|-----------------------------------------------|-----|--------------------|---|---------|----|----------------|
| 9. Declining Enrollment (WFTE share)          | (c) | <u>0</u>           | x | 0.2433% | \$ | <u>-</u>       |
| 10. Sparsity Supplement (WFTE share)          | (c) | <u>0</u>           | x | 0.2433% | \$ | <u>-</u>       |
| 11. Discretionary Local Effort (WFTE share)   | (c) | <u>116,732,452</u> | x | 0.2433% | \$ | <u>284,010</u> |
| 12. Proration to Funds Available (WFTE share) | (c) | <u>0</u>           | x | 0.2433% | \$ | <u>-</u>       |
| 13. Discretionary Lottery (WFTE share)        | (c) | <u>980,408</u>     | x | 0.2433% | \$ | <u>2,385</u>   |

14. Class Size Reduction Funds:

|         | Weighted FTE (not including Add-On) X | DCD    | X Allocation factors             |    |                |
|---------|---------------------------------------|--------|----------------------------------|----|----------------|
| PK - 3  | 481.3900                              | 1.0254 | 1,313.27                         | =  | <u>648,253</u> |
| 4-8     | 223.3200                              | 1.0254 | 895.79                           | =  | <u>205,129</u> |
| 9-12    | 0.0000                                | 1.0254 | 897.95                           | =  | <u>0</u>       |
| Total * | <u>704.7100</u>                       |        | Total Class Size Reduction Funds | \$ | <u>853,382</u> |

(\*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

|                                    |     |            |   |       |    |               |
|------------------------------------|-----|------------|---|-------|----|---------------|
| 15. Student Transportation         | (f) |            |   |       |    |               |
| Enter All Adjusted Fundable Riders |     | <u>130</u> | x | 366   | \$ | <u>47,580</u> |
| Enter All Adjusted ESE Riders      |     |            | x | 1,373 | \$ | <u>-</u>      |

16. Federally Connected Student Supplement

(g)

| Impact Aid Student Type    | Number of Students | Exempt Property Allocation | Impact Aide Student Allocation | Total |
|----------------------------|--------------------|----------------------------|--------------------------------|-------|
| Military and Indian Lands  |                    | \$0.00                     | \$0.00                         | \$ -  |
| Civilians on Federal Lands |                    | \$0.00                     | \$0.00                         | \$ -  |
| Students with Disabilities |                    |                            | \$0.00                         | \$ -  |
| Total                      |                    |                            |                                | \$ -  |

17. Florida Teachers Classroom Supply Assistance Program

(h)

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

(i)

Total \$ 4,480,577

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

(j)

|                                                                                            |  |    |                 |
|--------------------------------------------------------------------------------------------|--|----|-----------------|
| If you have more than a 75% ESE student population, please place a 1 in the following box: |  | \$ | <u>-</u>        |
| Average Revenue per Student:                                                               |  | \$ | <u>6,914</u>    |
| Revenue Increase from Previous Year                                                        |  |    | <u>1%</u>       |
| Adjusted Revenue Per Student                                                               |  | \$ | <u>7,123.99</u> |

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(l)(i), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated based on unweighted full-time equivalent students.

Administrative fees:

*Administrative fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 5%.*

*For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 2%.*

Other:

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*

## Revenue Estimate Worksheet for Somerset Parks Academy Charter School

Based on the 2015-16 FEFP Conference Report

School District:

Broward

## 1. 2015-16 FEFP State and Local Funding

Base Student Allocation

\$4,154.45

District Cost Differential: 1.0254

| Program                            | Number of FTE | Program Cost Factor | Weighted FTE<br>(2) x (3) | 2015-16<br>Base Funding |                  |
|------------------------------------|---------------|---------------------|---------------------------|-------------------------|------------------|
|                                    |               |                     |                           | (WFTE x BSA x DCD)      |                  |
| (1)                                | (2)           | (3)                 | (4)                       | (5)                     |                  |
| 101 Basic K-3                      | 330.00        | 1.115               | 367.9500                  | \$                      | 1,567,457        |
| 111 Basic K-3 with ESE Services    | 52.00         | 1.115               | 57.9800                   | \$                      | 246,993          |
| 102 Basic 4-8                      | 169.00        | 1.000               | 169.0000                  | \$                      | 719,935          |
| 112 Basic 4-8 with ESE Services    | 26.00         | 1.000               | 26.0000                   | \$                      | 110,759          |
| 103 Basic 9-12                     | 0.00          | 1.005               | 0.0000                    | \$                      | -                |
| 113 Basic 9-12 with ESE Services   | 0.00          | 1.005               | 0.0000                    | \$                      | -                |
| 254 ESE Level 4 (Grade Level PK-3) |               | 3.613               | 0.0000                    | \$                      | -                |
| 254 ESE Level 4 (Grade Level 4-8)  |               | 3.613               | 0.0000                    | \$                      | -                |
| 254 ESE Level 4 (Grade Level 9-12) |               | 3.613               | 0.0000                    | \$                      | -                |
| 255 ESE Level 5 (Grade Level PK-3) |               | 5.258               | 0.0000                    | \$                      | -                |
| 255 ESE Level 5 (Grade Level 4-8)  |               | 5.258               | 0.0000                    | \$                      | -                |
| 255 ESE Level 5 (Grade Level 9-12) |               | 5.258               | 0.0000                    | \$                      | -                |
| 130 ESOL (Grade Level PK-3)        | 47.00         | 1.180               | 55.4600                   | \$                      | 236,258          |
| 130 ESOL (Grade Level 4-8)         | 24.00         | 1.180               | 28.3200                   | \$                      | 120,642          |
| 130 ESOL (Grade Level 9-12)        | 0.00          | 1.180               | 0.0000                    | \$                      | -                |
| 300 Career Education (Grades 9-12) |               | 1.005               | 0.0000                    | \$                      | -                |
| <b>Totals</b>                      | <b>648.00</b> |                     | <b>704.7100</b>           | <b>\$</b>               | <b>3,002,044</b> |

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

| Additional FTE (a)                  | Number of FTE   | 2015-16<br>Base Funding      |                     |
|-------------------------------------|-----------------|------------------------------|---------------------|
|                                     |                 | (WFTE x BSA x DCD)           |                     |
| Advanced Placement                  |                 | \$                           | -                   |
| International Baccalaureate         |                 | \$                           | -                   |
| Advanced International Certificate  |                 | \$                           | -                   |
| Industry Certified Career Education |                 | \$                           | -                   |
| Early High School Graduation        |                 | \$                           | -                   |
| Small District ESE Supplement       |                 | \$                           | -                   |
| <b>Total Additional FTE</b>         | <b>0.0000</b>   | <b>Additional Base Funds</b> | <b>\$ -</b>         |
| <b>Total Funded Weighted FTE</b>    | <b>704.7100</b> | <b>Total Base Funding</b>    | <b>\$ 3,002,044</b> |

| 2. ESE Guaranteed Allocation:                                                                                                                          | FTE          | Grade Level | Matrix Level | Guarantee Per Student      |                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------|--------------|----------------------------|------------------|
|                                                                                                                                                        |              |             |              |                            |                  |
|                                                                                                                                                        | 52.00        | PK-3        | 251          | \$ 1,058                   | \$ 55,016        |
| Additional Funding from the ESE                                                                                                                        |              | PK-3        | 252          | \$ 3,418                   | \$ -             |
| Guaranteed Allocation. Enter the FTE from 111,112 and 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. | 26.00        | PK-3        | 253          | \$ 6,974                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 251          | \$ 1,187                   | \$ 30,862        |
|                                                                                                                                                        |              | 4-8         | 252          | \$ 3,546                   | \$ -             |
|                                                                                                                                                        |              | 4-8         | 253          | \$ 7,102                   | \$ -             |
| This total should equal all FTE from programs 111, 112 and 113 above.                                                                                  | 0.00         | 9-12        | 251          | \$ 845                     | \$ -             |
|                                                                                                                                                        |              | 9-12        | 252          | \$ 3,204                   | \$ -             |
|                                                                                                                                                        |              | 9-12        | 253          | \$ 6,760                   | \$ -             |
| <b>Total FTE with ESE Services</b>                                                                                                                     | <b>78.00</b> |             |              | <b>Total ESE Guarantee</b> | <b>\$ 85,878</b> |

3A. Divide school's Unweighted FTE (UFTE) total computed in Section 1, cell C27 above by the district's total UFTE to obtain school's UFTE share. Charter School UFTE: 648.00 ÷ District's Total UFTE: 267,112.97 = 0.2426%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E38 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 704.71 ÷ District's Total WFTE: 289,621.53 = 0.2433%



|                                                                            |        |                   |   |         |    |                |
|----------------------------------------------------------------------------|--------|-------------------|---|---------|----|----------------|
| 4. Supplemental Academic Instruction (UFTE share)                          | (b)    | <u>53,972,820</u> | x | 0.2426% | \$ | <u>130,938</u> |
| 5. Discretionary Millage Compression Allocation<br>.748 Mills (UFTE share) | (b)    | <u>0</u>          | x | 0.2426% | \$ | <u>-</u>       |
| 6. Digital Classrooms Allocation (UFTE share)                              | (b)(d) | <u>4,317,610</u>  | x | 0.2426% | \$ | <u>10,475</u>  |
| 7. Safe Schools Allocation (UFTE share)                                    | (b)    | <u>5,896,615</u>  | x | 0.2426% | \$ | <u>14,305</u>  |
| 8. Instructional Materials Allocation (UFTE share)                         | (b)    | <u>20,437,009</u> | x | 0.2426% | \$ | <u>49,580</u>  |
| Dual Enrollment Instructional Materials Allocation                         | (e)    |                   |   |         |    |                |
| ESE Applications Allocation:                                               |        |                   |   |         |    |                |

Charter schools should contact their school district sponsor regarding eligibility and distribution of ESE Applications funds.

|                                               |     |                    |   |         |    |                |
|-----------------------------------------------|-----|--------------------|---|---------|----|----------------|
| 9. Declining Enrollment (WFTE share)          | (c) | <u>0</u>           | x | 0.2433% | \$ | <u>-</u>       |
| 10. Sparsity Supplement (WFTE share)          | (c) | <u>0</u>           | x | 0.2433% | \$ | <u>-</u>       |
| 11. Discretionary Local Effort (WFTE share)   | (c) | <u>116,732,452</u> | x | 0.2433% | \$ | <u>284,010</u> |
| 12. Proration to Funds Available (WFTE share) | (c) | <u>0</u>           | x | 0.2433% | \$ | <u>-</u>       |
| 13. Discretionary Lottery (WFTE share)        | (c) | <u>980,408</u>     | x | 0.2433% | \$ | <u>2,385</u>   |

14. Class Size Reduction Funds:

|         | Weighted FTE (not including Add-On) X | DCD    | X Allocation factors |   |                                  |                   |
|---------|---------------------------------------|--------|----------------------|---|----------------------------------|-------------------|
| PK - 3  | 481.3900                              | 1.0254 | 1,313.27             | = | <u>648,253</u>                   |                   |
| 4-8     | 223.3200                              | 1.0254 | 895.79               | = | <u>205,129</u>                   |                   |
| 9-12    | 0.0000                                | 1.0254 | 897.95               | = | <u>0</u>                         |                   |
| Total * | <u>704.7100</u>                       |        |                      |   | Total Class Size Reduction Funds | \$ <u>853,382</u> |

(\*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)

|                                    |     |            |   |       |    |               |
|------------------------------------|-----|------------|---|-------|----|---------------|
| 15. Student Transportation         | (f) |            |   |       |    |               |
| Enter All Adjusted Fundable Riders |     | <u>130</u> | x | 366   | \$ | <u>47,580</u> |
| Enter All Adjusted ESE Riders      |     |            | x | 1,373 | \$ | <u>-</u>      |

16. Federally Connected Student Supplement

(g)

| Impact Aid Student Type    | Number of Students | Exempt Property Allocation | Impact Aide Student Allocation | Total |
|----------------------------|--------------------|----------------------------|--------------------------------|-------|
| Military and Indian Lands  |                    | \$0.00                     | \$0.00                         | \$ -  |
| Civilians on Federal Lands |                    | \$0.00                     | \$0.00                         | \$ -  |
| Students with Disabilities |                    |                            | \$0.00                         | \$ -  |
| Total                      |                    |                            |                                | \$ -  |

17. Florida Teachers Classroom Supply Assistance Program

(h)

18. Reading Allocation

Charter schools should contact their school district sponsor regarding eligibility and distribution of reading allocation funds.

19. Food Service Allocation

(i)

Total \$ 4,480,577

20. Funding for the purpose of calculating the administrative fee for ESE charter schools.

(j)

If you have more than a 75% ESE student population, please place a 1 in the following box: ☐ \$ -

Average Revenue per Student: \$ 6,914  
Revenue Increase from Previous Year 1%  
Adjusted Revenue Per Student \$ 7,195.23

NOTES:

(a) Additional FTE includes FTE earned through Advanced Placement, International Baccalaureate, Advanced International Certificate of Education, Industry Certified Career Education (CAPE), Early High School Graduation and the small district ESE Supplement, pursuant to s. 1011.62(1)(l-p), F.S.

(b) District allocations multiplied by percentage from item 3A.

(c) District allocations multiplied by percentage from item 3B.

(d) The Digital Classroom Allocation is provided pursuant to s. 1011.62(12), F.S., and requires that charter schools submit a digital classrooms plan to their school district for approval by the Department of Education prior to distribution of funds.

(e) School districts are required to pay for instructional materials used for the instruction of public high school students who are earning credit toward high school graduation under the dual enrollment program as provided in s. 1011.62(l)(i), F.S.

(f) Numbers entered here will be multiplied by the district level transportation funding per rider. "All Adjusted Fundable Riders" should include both basic and ESE Riders. "All Adjusted ESE Riders" should include only ESE Riders.

(g) The Federally Connected Student Supplement provides additional funding for students on federal lands that receive Section 8003 impact aide pursuant to s. 1011.62(13), F.S.

(h) Teacher Classroom Supply Assistance Program allocation pursuant to s. 1012.71, F.S., for certified teachers employed by a public school district or public charter school before September 1 of each year whose full-time or job-share responsibility is the classroom instruction of students in prekindergarten through grade 12, including full-time media specialists and certified school counselors serving students in prekindergarten through grade 12, who are funded through the FEFP.

(i) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

(j) Consistent with s. 1002.33(20)(a), F.S., for charter schools with a population of 75% or more ESE students, the administrative fee shall be calculated based on unweighted full-time equivalent students.

**Administrative fees:**

*Administrative fees charged by the school district pursuant to s. 1002.33(20)(a), F.S., shall be calculated based upon 5% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 5%.*

*For high performing charter schools, administrative fees charged by the school district shall be calculated based upon 2% of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 251 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in s. 1013.62(2), F.S. To calculate the administrative fee to be withheld for schools with more than 250 students, divide the school population into 250. Multiply that fraction times the funds available, then times 2%.*

**Other:**

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*



*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

# ***APPENDIX B***

# ***ARTICLES***

**For:**  
**SOMERSET PARKS**  
**ACADEMY**  
**CHARTER SCHOOL**

**ARTICLES OF INCORPORATION OF THE SOMERSET  
NEIGHBORHOOD SCHOOL, INC.**

THE UNDERSIGNED, as incorporator and on behalf of a non-for-profit, non-stock corporation under the laws of the State of Florida, hereby adopts the following Articles of Incorporation:

**ARTICLE I**

**NAME**

Section 1.1. The name of the Corporation is The Somerset Neighborhood School, Inc.

**ARTICLE II**

**DURATION**

Section 2.1. The Corporation shall have perpetual existence unless dissolved pursuant to law.

**ARTICLE III**

**NON-STOCK CORPORATION**

Section 3.1. The Corporation shall be organized on a non-stock basis under the Florida Not-for-Profit Corporation Act and may issue no Certificates of Membership.

**ARTICLE IV**

**PURPOSE**

Section 4.1. The purposes for which the Corporation is organized is for transacting any and all lawful business for which corporations may be incorporated under the Florida Not-for-Profit Corporation Act and to distribute the whole or any part of the income therefrom and the principal thereof exclusively for charitable, religious, scientific, literary, or educational purposes, either

directly or by contributions to organizations that qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code and Regulations issued pursuant thereto, as they now exist or as they may hereafter be amended.

Section 4.2 The Corporation shall have the power, either directly or indirectly, either alone or in conjunction or cooperation with others, to do any and all lawful acts and things and to engage in any and all lawful activities which may be necessary, useful, suitable, desirable, or proper for the furtherance, accomplishment, fostering, or attainment of any or all of the purposes for which a Corporation is organized, and to aid or assist other organizations whose activities are such as to further accomplish, foster, or attain any of such purposes. Notwithstanding anything herein to the contrary, the Corporation shall exercise only such powers as are in furtherance of the exempt purposes of organizations set forth in Section 501(c)(3) of the Internal Revenue Code of 1986 and the regulations thereunder as the same now exist or as they may be hereinafter amended from time to time.

Section 4.3. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, any Director or Officer of the Corporation or any other private individual (except that reasonable compensation may be paid for services rendered to or for the Corporation affecting one or more of its purposes); and no Director or Officer of the Corporation, or any private individual, shall be entitled to share in the distribution of any of the corporate assets on dissolution of the Corporation.

Section 4.4. No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate or intervene in (including the publication or distribution of statements) any political campaign on behalf of any candidate for public office.

Section 4.5. The Corporation shall distribute its income for each taxable year at such time and in such manner as not to become subject to tax on undistributed income imposed by Section 4942 of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.6. The Corporation shall not engage in any act of self-dealing as defined in Section 4941(c) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.7. The Corporation shall not retain any excess business holdings as defined in Section 4943(c) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.8. The Corporation shall not make any investments in such manner as to subject it to tax under Section 4944 of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.9. The Corporation shall not make any taxable expenditure as defined in Section 4945(d) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.

Section 4.10. Notwithstanding any other provisions of these Articles of Incorporation, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code and Regulations issued pursuant thereto as they now exist or as they may hereafter be amended, or by an organization contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code and said Regulations as they now exist or as they may hereafter be amended.

Section 4.11. Upon the dissolution of the Corporation, the Board of Directors shall, after paying, or making provision for the payment of, all of the liabilities of the Corporation, dispose of all of the assets of the Corporation, exclusively for the purposes of the Corporation in such manner, or to such organization or organizations organized and operated exclusively for charitable, educational, religious or scientific purposes, as shall at the time qualify as an exempt organization or organizations under Section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provisions of any future United States Revenue Law), as the Board of Directors shall determine. Any of such assets not so disposed of shall be disposed of by the court having proper jurisdiction in the county where the principal office of the Corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, which are organized and operated exclusively for such purposes.

#### ARTICLE V

##### MEMBERS

Section 5.1. This Corporation shall have a membership consisting of the Board of Directors of the Corporation serving from time to time.

#### ARTICLE VI

##### DIRECTORS

Section 6.1. The affairs of the Corporation shall be governed by a Board of Directors (hereinafter referred to as the "Board"), subject to the restriction that, except as specifically set forth to the contrary in the Bylaws, the exercise of any powers or actions of the Board shall require the approval thereof by a majority vote of the Board present at a meeting at which a quorum of no less than two (2) Directors are present. The affirmative vote of any two (2) Directors shall be necessary for all corporate action requiring a vote of the Board, including, but not limited to the following:

6.1.1. Approval of charitable gifts, transfers, distributions and grants by the Corporation to other entities.

6.1.2. Adoption of an amendment to the Articles of Incorporation or the Bylaws.

6.1.3. Organization of a subsidiary or affiliate by the Corporation

6.1.4. Approval of any merger, consolidation or sale or other transfer of all or a substantial part of the Corporation.

Section 6.2. The initial Board of Directors shall consist of the following members elected in accordance with this Section 6.2 and the Bylaws:

Section 6.3. The term of office of an elected Director shall be one (1) year and shall expire, regardless of whether or not a successor shall have been duly elected and qualified. The terms of elected Directors shall be staggered so that no elected Director's term expires less than four (4) months before the expiration of the next elected Director.

#### ARTICLE VII

##### ADDRESS

Section 7.1. The street address of the principal office of this corporation in the State of Florida is:  
6262 Bird Road, Suite 31  
Miami, FL 33155

The Board may, from time to time, move its principal office in the State of Florida to another place in this state.



**ARTICLE VIII**  
**REGISTERED AGENT AND REGISTERED OFFICE**

Section 8.1. The registered agent and registered office of the Corporation shall be:

| Name            | Address                                     |
|-----------------|---------------------------------------------|
| IGNACIO ZULUETA | 6262 BIRD ROAD, SUITE 31<br>MIAMI, FL 33155 |

**ARTICLE IX**  
**AMENDMENT**

Section 9.1. These Articles of Incorporation may be amended in the manner and with the vote provided by law.

**ARTICLE X**  
**BYLAWS**

Section 10.1. The Board of Directors of this Corporation shall adopt Bylaws for the government of this Corporation which shall be subordinate only to the Articles of Incorporation and the laws of the United States and the State of Florida. The Bylaws may be amended from time to time by the Board of Directors.

**ARTICLE XI**  
**INCORPORATOR**

Section 11.1. The name and address of the incorporator of this Corporation are as follows:

| Name           | Address                                      |
|----------------|----------------------------------------------|
| IGNACIO ZULETA | 6262 BIRD ROAD, SUITE 111<br>MIAMI, FL 33155 |

IN WITNESS WHEREOF, the undersigned Incorporator has executed these Articles of Incorporation this 2 day of MAY 1997.

INCORPORATOR

*[Signature]*  
IGNACIO ZULETA

CERTIFICATE DESIGNATING PLACE OF BUSINESS OR  
DOMICILE FOR THE SERVICE OF PROCESS WITHIN THIS STATE,  
NAMED AGENT UPON WHOM PROCESS MAY BE SERVED

In pursuance of Section 48091 and Section 607.0501(3), Florida Statutes, the following is  
submitted in compliance with said Sections:

The Somerset Neighborhood School, Inc. desiring to organize under the laws of the State of  
Florida with its principal office as indicated in the Certificate of Incorporation, at the City of Fort  
Lauderdale, County of Broward, State of Florida, has named IGNACIO ZULUETA  
located at 6262 BIRD ROAD, SUITE 31  
MIAMI, FL 33155

as its agent to accept service of process within this State.

ACKNOWLEDGMENT

Having been named to accept service of process for the above-named corporation, at the place  
designated in this Certificate, I hereby accept to act in this capacity, and agree to comply with the  
provisions of said Sections relative to keeping open said office.

REGISTERED AGENT

Date

IGNACIO ZULUETA

**ARTICLES OF AMENDMENT  
to  
ARTICLES OF INCORPORATION  
Somerset Neighborhood School, Inc.**

Pursuant to the provisions of section 617.1006, Florida Statutes, the undersigned Florida nonprofit corporation adopts the following articles of amendment to its articles of incorporation.

**FIRST:** Amendment(s) adopted: (INDICATE ARTICLE NUMBER(S) BEING AMENDED, ADDED OR DELETED.)

**AMENDMENT TO ARTICLE I**

The name of the Corporation shall now be:

**SOMERSET ACADEMY, INC.**

**SECOND:** The date of adoption of the amendment(s) was: JANUARY 14, 2000

**THIRD:** Adoption of Amendment (CHECK ONE)

- ☒ The amendment(s) was (were) adopted by the members and the number of votes cast for the amendment were sufficient for approval.

There are no members or members entitled to vote on the amendment. The amendment(s) was (were) adopted by the board of directors.

**Somerset Academy, Inc.**

\_\_\_\_\_  
Corporation Name

Magdalena Fresen

\_\_\_\_\_  
Signature of Chairman, Vice Chairman, President, or other Officer

Magdalena Fresen

\_\_\_\_\_  
Typed or Printed Name

Secretary

2/18/00

\_\_\_\_\_  
Title & Date

FILED  
STATE  
ALABAMA  
FLORENCE

00 MAR -2 AM 9:48

FILED

# State of Florida



## Department of State

I certify the attached is a true and correct copy of the Articles of Amendment, filed on March 2, 2000, to Articles of Incorporation for THE SOMERSET NEIGHBORHOOD SCHOOL, INC. which changed its name to SOMERSET ACADEMY, INC., a Florida corporation, as shown by the records of this office.

The document number of this corporation is N97000002553.

Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capitol, this the  
Thirteenth day of March, 2000



ORSE022 1 22

*Katherine Harris*

Katherine Harris  
Secretary of State



Department of State

I certify the attached is a true and correct copy of the Articles of Incorporation of THE SOMERSET NEIGHBORHOOD SCHOOL, INC., a corporation organized under the laws of the State of Florida, filed on May 5, 1997, as shown by the records of this office.

The document number of this corporation is N97000002553.

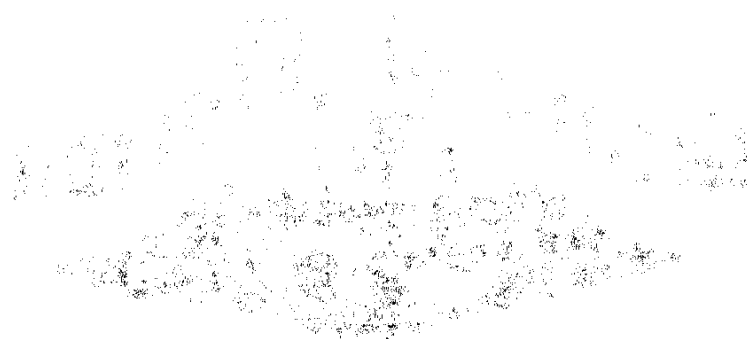
Given under my hand and the  
Great Seal of the State of Florida,  
at Tallahassee, the Capitol, this the  
Twenty-second day of July, 1997



CR2EO22 (2-95)

*Sandra B. Northam*

Sandra B. Northam  
Secretary of State



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*[Handwritten signature]*





*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

# ***APPENDIX C***

# ***BYLAWS***

**For:**  
**SOMERSET PARKS**  
**ACADEMY**  
**CHARTER SCHOOL**



**BYLAWS OF  
SOMERSET ACADEMY, INC.  
A Florida Nonprofit Corporation**

**ARTICLE 1  
OFFICES**

The corporation's principal office shall be fixed and located at such place within the boundaries of the County of Miami-Dade or Broward, Florida, as the Board of Directors ("Board") shall determine. The Board is granted full power and authority to change the principal office from one location to another.

**ARTICLE 2  
PURPOSE**

The specific and general purposes of the corporation are described in the Articles of Incorporation.

**ARTICLE 3  
NO MEMBERS**

Section 3.1 No Members

The corporation shall have no members. Any action, which would otherwise; by law require approval by a majority of all members or approval by the members shall require only approval of the Board. All rights, which would otherwise by law vest in the members, shall vest in the board.

**ARTICLE 4  
DIRECTORS**

Section 4.1 General Powers

Subject to the limitations of the Florida not-for-profit corporation law, the corporation's Articles of Incorporation and these Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board may engage the services of a management company with respect to certain operations of the corporation, provided that the activities and affairs of the corporation shall be managed and all corporate powers shall be exercised under the ultimate direction of the Board. No assignment, referral or delegation of authority by the Board or anyone acting under such delegation shall preclude the Board from exercising full authority over the conduct of the corporation's activities, and the Board may, subject to contractual obligations as may exist, rescind any such assignment, referral or delegation at any time.

## Section 4.2 Specific Powers

Without prejudice to its general powers, but subject to the same limitations set forth above, the Board shall have the following powers in addition to any other powers enumerated in these Bylaws and permitted by law:

- a. To select and remove all of the officers, agents and employees of the corporation; to prescribe powers and duties for them which are not inconsistent with law, the corporation's Articles of Incorporation or these Bylaws; and to fix their compensation;
- b. To conduct, manage and control the affairs and activities of the corporation and to make such rules and regulations therefore which are not inconsistent with the law, the corporation's Articles of Incorporation or these Bylaws, as it deems best;
- c. To adopt, make and use a corporate seal and to alter the form of the seal from time to time, as it deems best;
- d. To borrow money and incur indebtedness for the purpose of the corporation, and to cause to be executed and delivered therefore, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecation's and other evidences of debt and securities therefore;
- e. To act as trustee under any trust incidental to the principal object of the corporation, and receive, hold, administer, exchange and expend funds and property subject to such trust;
- f. To acquire by purchase, exchange, lease, gift, devise, bequest, or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property;
- g. To assume any obligations, enter into any contracts or other instruments, and do any and all other things incidental or expedient to the attainment of any corporate purpose;
- h. To form and be a member or shareholder of a not-for-profit entity organized under the law of any state, or to form without members or shareholders a not-for-profit entity organized under the law of any state, for the purposes of education, education or other research, or support of education or education research; and
- i. To carry out such other duties as are described in the Charter or Articles or Incorporation.

## Section 4.3 Number, Election and Term of Directors and Related Matters

- a. The authorized number of Directors shall be no less than three (3) and no greater than eleven (11) until changed by amendment of these Bylaws.
- b. Those Directors who are to be elected by the Board of Directors (which shall be the difference between the total number of Directors to comprise the Board of Directors and the number of Directors elected by the Development Committee as provided below) shall be so elected at the annual meeting of the Board of

Directors then in the office. Except as set forth below, only existing members of the Board of Directors may nominate candidates for new Directors. Notice of the Board's intention to elect a Director shall be included in the agenda for that meeting of the Board and shall be publicly announced.

- c. The members of the Development Committee (described below), at each annual meeting of the Board of Directors, shall annually elect by aggregate majority vote up to three Directors of the corporation chosen from the persons so nominated by each Local Board (described below); provided however that the number of such Directors shall not exceed the number of such Local Boards as of the date of the annual meeting. Each such member of the Board of Directors elected by the Development shall have the same tenure and other rights and responsibilities as the balance of the members of the Board of Directors;
- d. Each member of the Board of Directors shall have a term of five years, and may only be re-elected for up to three (3) consecutive terms. Upon serving the maximum term, a Director's term shall automatically expire without further action of the Board. Each such Director who has successfully completed their term as Director, shall be invited to participate in a group of Emeritus Directors. Emeritus Directors are invited to attend Board meetings and other Somerset Academy Inc. functions, provide advice and counsel to the Board, but shall have no voting power.
- e. Directors shall be elected at a duly held meeting of the Board of Directors;
- f. The Board shall include at least one member who is the parent of a child enrolled in a school operated by the corporation and at least one member who is or has been a professional educator and/or school administrator, having experience in education. The Board should endeavor to be comprised of a diverse group of accomplished professional, academic, business, and/or civic minded individuals who are committed to the mission of the corporation.
- g. Persons who are employed by, or are principals of, either a sponsor or a management company for the corporation are not eligible and shall not be elected to serve on the Board so as to avoid potential conflicts of interest. The Board will seek to avoid filling future vacancies on the Board with persons who are employed by schools which are managed by the same company that manages schools operated by the corporation. However, if the corporation does not have a professional educator or administrator on its Board and if the application process described in Section 4.5 does not produce such an applicant for the Board, then the Board may consider and select as a Director an educator or administrator employed by the same company that manages schools operated by the corporation.

#### Section 4.4 Resignation and Removal

Any Director may resign effective upon giving written notice to the Board, unless the notice specifies a later effective time. If the resignation is effective at a future time, a successor may be selected (by the existing president) before such time, to take office when the resignation becomes effective. A Director may be removed without cause by a majority of the Directors then in office.

#### Section 4.5 Vacancies

- a. A Board vacancy or vacancies shall be deemed to exist if any Director dies, resigns, or is removed, or if the authorized number of Directors is increased.
- b. The Board shall declare vacant the office of any Director who has been convicted of a felony, or whose fingerprint check results reveal non-compliance with standards of good moral character.
- c. In order to elect a new Director, the Board shall announce the vacancy to the public, including Somerset Academy Inc. parents, teachers, and schools, and invite applications from qualified persons all as described by the Board. The Chairman or another Board member approved by the Board, shall conduct an initial review and evaluation of all applications and report to the Board by way of nomination of candidates. Board members are encouraged to solicit applications from qualified persons. Following review and discussion of the nominated candidates, the Board will proceed to elect the nominated candidates as new Director(s).
- d. New Directors shall be elected by a vote of the majority of the existing Directors. Each Director so elected shall hold office until a successor has been appointed and qualified.
- e. No reduction of the authorized number of Directors shall have the effect of removing any Director prior to the expiration of the Director's term of office.
- f. The Board shall develop an orientation and training program for new Directors and an annual continuing education program for existing Directors.

#### Section 4.6 Attendance

Directors must be willing and able to travel to fulfill their obligations to Somerset Academy Inc. The Board may declare vacant, the office of any Director if, in any given calendar year:

- (a) He/She is absent from three consecutive meetings; or
- (b) He/She is absent from four of the board's meetings;
- (c) if he/she fails to attend any Authorizer-required conference(s)/meeting(s) at which attendance is mandatory; provided that regardless of their compliance with subsection (a) and (b) above, members must attend at least 50 percent of all the board meetings held during a year.

#### Section 4.7 Place/Notice of Meetings/Compliance with Applicable Laws

Meetings of the Board may be held at the principal office of the corporation or at any other place that has been designated in the notice of the meeting or by resolution of the Board. Appropriate notices of the meeting complying with both Florida law as well as the Texas Open Meetings Act for those meetings that relate to the operations of the Brooks Academy of Science and Engineering shall be timely posted or published as required by law, and all meetings shall be held and conducted in accordance with applicable open or public meetings laws. The public, any board member or officer of the corporation shall place any desired item on the agenda of any board meeting by notifying, in writing, no later than 5 (five) business days prior to the scheduled board meeting, a description of the item to be placed in the agenda and said descriptions shall be delivered to the then acting secretary of the corporation. Any meetings that relate to the operations of the Brooks Academy of Science and Engineering will be held in the State of Texas. Such meetings of the Board called under Sections 4.7, 4.8, and 4.9 or pursuant to any other provision of these bylaws, shall comply with each and every provision of the Texas Open Meetings Act, which law is hereby incorporated by reference.

#### Section 4.8 Annual Meetings

The Board shall hold an annual meeting for the purposes of organization, selection of Directors and officers, and the transaction of other business.

#### Section 4.9 Quarterly Meetings

Quarterly meetings of the Board, shall be held on such dates and at such times and places as may be from time to time fixed and notified by the Board.

#### Section 4.10 Special Meetings

- a. Special meetings of the Board for any purpose(s) may be called at any time by the Chairman of the Board, if there is such an officer, the President, or the Secretary.
- b. Special meetings of the Board may be held after each Director has received notice by mail, telecopy, e-mail or telephone.
- c. Oral notice shall be deemed received at the time it is communicated, in person or by telephone or wireless, to the recipient or to a person at the office of the recipient whom the person giving the notice has reason to believe will promptly communicate it to the receiver.

#### Section 4.11 Quorum and Voting

One half (1/2) of the authorized Directors then in the office shall constitute a quorum. The Board shall attempt to reach a general consensus on all actions before the Board; provided, however, that every act or decision done or made by a majority of the Directors present at a meeting duly held at which a quorum is present is an act of the Board. A meeting at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of Directors, if any action taken is approved by at least a majority of the required quorum for such meeting.

#### Section 4.12 Waiver of Notices

Notice of meeting need not be given to any Director who signs a waiver of notice, a written consent to the holding of the meeting, an approval of the minutes of the meeting, whether before or after the meeting, or who attends the meeting without protesting the lack of notice prior thereto or at its commencement. All such waivers, consents and approvals shall be filed with the corporate records or made a part of the minutes of the meetings.

#### Section 4.13 Adjournment

A majority of the Directors present, whether or not a quorum is present, may adjourn any Director's meeting to another time and place. If a meeting is adjourned for more than twenty-four (24) hours, notice of such adjournment to another time or place shall be given, prior to the time scheduled for the continuation of the meeting, to the Directors who were not present at the time of the adjournment.

#### Section 4.14 Rights of Inspection

Every Director has the absolute right to inspect and copy all books, records and documents of every kind and to inspect the physical properties of the corporation provided such inspection is conducted at a reasonable time after reasonable notice, and provided that such right of inspection and copying is subject to the corporation's obligations to maintain the confidentiality of certain books, records and documents under any applicable federal, state or local law.

#### Section 4.15 Fees and Compensation

Directors shall not receive compensation for their services; however, the Board may approve the reimbursement of a Director's actual and necessary expenses incurred in the conduct of the corporation's business. The corporation shall carry liability insurance covering the Director's and Officers of the corporation as described on the Charter on the conduct of the corporation's business.

#### Section 4.16 Standard of Care

- a. A Director shall perform all duties of a Director in good faith, in a manner such Director believes to be in the best interests of the corporation and with such care, including the duty to make all reasonable inquiries, as an ordinarily prudent person in a like situation would use under similar circumstances.
- b. In performing the duties of a Director, a Director may rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:
  - i. One or more officers or employees of the corporation whom the Director believes to be reliable and competent in the matters presented;
  - ii. Legal counsel, independent accountants or other persons as to matters that the Director believes to be within such person's professional or expert competence; or
  - iii. A committee of the Board upon which the Director does not serve as to matters within a designated authority, provided the Director believes that the committee merits confidence and the Director acts in good faith, after reasonable inquiry when the need therefore is indicated by the circumstances, and without knowledge that would cause such reliance to be unwarranted.

#### Section 4.17 Alumni Member

The Board may provide an open seat for a Board candidate who is a high-school graduate of a Somerset Academy school.

The alumni board member must meet all of the criteria of all board members, including but not limited to the following: shall have the ability to travel; shall meet the stated attendance requirements; shall participate in all required Governing Board trainings; and shall submit to, and successfully clear, any and all required fingerprint and/or background checks.

The alumni board member shall serve an initial 2-year term, and shall be subject to the same maximum term limits as described in Section 4.3(d).

### ARTICLE 5 OFFICERS

#### Section 5.1 Officers

The officers of the corporation shall be Chair, Vice Chair, Secretary, and President, each of whom shall be appointed by the Board. The corporation may also have, at the discretion of the Board, a Treasurer and Vice-President, and such other officers and assistant officers as may be elected or appointed by the Board. Any number of offices may be held by the same person, except that the Chair may not also serve as President of the Corporation. Unless otherwise stated, officers need not be a director, or a member of the governing board, in order to hold an office. An officer who does not also serve as a director or a member of the governing board, is not subject to the prohibition against receiving fees or compensation for services rendered to the Corporation. .

##### 5.1.1 Chair

The Chair of Somerset Academy Inc., shall be elected by the Board of Directors of Somerset Academy Inc., at its annual meeting. The Chair may be removed from office as Chair without cause at any time upon an affirmative vote of a majority of the Directors of Somerset Academy Inc.:

- a. The Chair shall be the presiding officer at all meetings of Somerset Academy Inc.
- b. The Chair shall appoint all of the chairs of committees and all members of all committees, subject to the approval or ratification of Somerset Academy Inc. All such committee chairs and members of committees shall serve at the pleasure of the Chair and the Chair may remove the chair(s) of any such committee and any committee member, without cause at any time.
- c. The Chair shall serve as a nonvoting, ex officio member of all committees of the Somerset Academy Inc., and the presence of the Chair may count as quorum at any committee meeting.



#### 5.1.2 Vice-Chair

The Vice- Chair of Somerset Academy Inc., shall be elected by the Board of Directors of Somerset Academy Inc., at its annual meeting. The Chair may be removed from office as Vice-Chair without cause at any time upon an affirmative vote of a majority of the Directors of Somerset Academy Inc.:

- a. The Vice Chair shall be the presiding officer at any meeting when the Chair of Somerset Academy Inc., is absent.
- b. In the event that the office of the Chair is vacant, the Vice Chair shall assume the duties and powers of the Chair until such time as the office of the Chair is no longer vacant.

#### 5.1.3 Secretary

- a. The Secretary shall keep or cause to be kept, at the principal office or such other place as the Board may order, a book of minutes of all meetings of the Board and its committees, including the following information for all such meetings; the time and place of holding; whether regular or special; if special, how authorized; the notice thereof given; the names of those present and absent, and the proceedings thereof. The Secretary shall keep, or cause to be kept, at the principal office in the State of Florida, the original or a copy of the corporation's Articles of Incorporation and Bylaws, as amended to date, and a register showing the names of all directors and their respective addresses. The Secretary shall keep the seal of the corporation and shall affix the same on such papers and instruments as may be required in the regular course of business, but failure to affix it shall not affect the validity of any instrument.
- b. The Secretary shall give, or cause to be given, notice of all meetings of the Board and any committees thereof required by these Bylaws or by law to be given, and shall distribute the minutes of meetings of the Board to all its members promptly after the meetings; shall keep the seal of the corporation in safe custody; shall see that all reports, statements and other documents required by law are properly kept or filed, except to the extent the same are to be kept or filed by the Treasurer; and shall have such other powers and perform such other duties as may be prescribed from time to time by the Board.
- c. The Secretary of the corporation shall keep and maintain, or cause to be kept and maintained, adequate and correct accounts of the properties and business transactions of the corporation, including accounts of its assets, liabilities, receipts and disbursements. The books of account shall at all times be open to inspection by any Director.

#### 5.1.4 President

The Board may hire a President who shall not be a Director and as such, shall be a non-voting position. The President shall not be a member of the Governing Board. The President is the general manager and chief executive officer of the corporation and has, subject to the control

of the Board, general supervision, direction and control of the business and officers of the corporation. The President shall report as directed to the Board at each meeting. The President has the general management powers and duties usually vested in the office of the President and general manager of a corporation as well as such other powers and duties as the Board may prescribe from time to time.

#### 5.1.5 Vice President

The Board may hire a Vice President who shall not be a Director, and as such, shall be a non-voting position. The Vice-President, if any, shall act in the place and stead of the President in the event of the President's absence, inability, or refusal to act. The Vice-President shall have such other powers and perform such other duties as the Board and the President may prescribe from time to time.

#### 5.1.6 Treasurer

The Treasurer, if any, shall insure or cause to be insured, that a true and accurate accounting of the financial transactions of the Corporation is made and that such accounting is presented to and made available to the Board. The Treasurer, if, any, shall perform such other duties as may be prescribed by the Board.

#### Section 5.2 Election

The officers of the corporation, shall be chosen by the Board at each biennium , or as provided above, and shall serve at the pleasure of the Board, and shall hold their respective offices until their resignation, removal or other disqualification from service, or until their respective successors shall be elected.

#### Section 5.3 Subordinate Officers

The Board may elect, and may empower the Chair to appoint, such other officers as the business of the corporation may require, each of whom shall hold office for such period, have such authority, and perform such duties as are provided in these Bylaws or as the Board may from time to time determine.

#### Section 5.4 Removal

Any officer may be removed, either with or without cause, by the Board at any time or, except for an officer chosen by the Board, by any officer upon whom the Board may confer such power of removal. Any such removal shall be without prejudice to the rights, if any, of an officer under any contract of employment.

#### Section 5.5 Resignation

Any officer may resign at any time by giving written notice to the Board; such resignation may not prejudice the rights, if any, of the corporation under any contract to which the officer is a party. Any such resignation shall take effect at the date of the receipt of such notice or at any later time specified therein, the acceptance of such resignation shall not be necessary to make it effective.

#### Section 5.6 Vacancies

A vacancy in any office because of death, resignation, removal, disqualification or any other cause shall be filled in the manner prescribed in these Bylaws for regular election or appointment to such office, provided that such vacancies shall be filled as they occur and not on an annual basis.

#### Section 5.7 Salaries

Each officer, who is not otherwise a Director or a member of the Governing Board, may be paid a reasonable salary, as may from time to time be determined by action of the Board. No such payment shall preclude any officer from serving the Corporation in any other capacity and receiving compensation for such services.

### ARTICLE 6 COMMITTEES

#### Section 6.1 Board Committees

The Board may, by resolution adopted by a majority of the Directors then in office, provided that a quorum is present, create one or more standing or ad hoc committees, each consisting of at least two (2) members of the Board, to serve at the pleasure of the Board.

#### Section 6.2 Local Governing Body Committees

The Board by resolution or by amendment to these bylaws may create and adopt bylaws for one or more states (each, a "Local Board"), all of whom shall serve at the pleasure of the Board, and may be removed by the Board from such local board, having such powers and responsibilities as are set forth in such bylaws or resolution.

#### Section 6.3 Development Committee

The Board hereby creates a committee to be known as the "Development Committee," whose members shall be the Liaison Members (as identified in the bylaws of the respective Local Boards) of each of the Local Boards. The Development Committee members shall select one of their members as Chair, and such person shall serve for a term of one year, with re-election as the Committee members shall

determine by their vote so long as such person remains a Liaison Member of a Local Board. Newly elected Liaison Members shall automatically succeed to membership (or become new members in the case of new Local Boards) on the Development Committee, without further act. The Development Committee shall meet on the call of the Chair (meetings shall be by teleconference unless the Board has authorized travel expense) for the purposes of discussing matters related to the Local Boards. In addition, each year the Development Committee shall elect up to three persons (but not more than the number of Local Boards), each of whom shall be a member of one of the Local Boards, to serve as Directors of corporation.

## ARTICLE 7 OTHER PROVISIONS

### Section 7.1 Validity of Instrument

Subject to the provision of applicable law, any note, mortgage, evidence of indebtedness, contract, conveyance or other written instrument and any assignment or endorsement thereof executed or entered into between the corporation and any other person, shall be valid and binding on the corporation when signed by the President or any Vice President and the Secretary or Treasurer of the corporation, unless the other person has actual knowledge that the signing officers has no authority to execute the same. Any such instruments may also be signed by the Board or a designated member of the Board.

### Section 7.2 Construction and Definitions

Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in the Nonprofit Corporation Law of the State of Florida shall govern the construction of these Bylaws. Without limiting the generality of the foregoing, words in these Bylaws shall be read as the masculine or feminine gender, and as the singular or plural, as the context requires, and the word "person" includes both the corporation and a natural person. The captions and headings in these Bylaws are for convenience of reference only and are not intended to limit or define the scope or effect of any provision.

### Section 7.3 Fiscal Year

The fiscal year of the corporation shall be set by the Board.

### Section 7.4 Conflict of Interest

Any Director, officer, key employee, or committee member having an interest in a contract or other transaction presented to the Board or a committee thereof for authorization, approval, or ratification shall make a prompt, full and frank disclosure of

his or her interest to the Board or committee prior to its acting on such contract or transaction. Such disclosure shall include all relevant and material facts known to such person about the contract or transaction which might reasonably be construed to be adverse to the corporation's interest. The following provisions of Texas law and rules and any amendments thereto: i) Education Code Chapter 12. Charters and, ii) Texas Administrative Code (TAC), Title 19, Part II Chapter 100 as they apply, relate and refer to conflicts of interest are hereby incorporated by reference and applicable to any board member, director, officer, key employee, or committee member having an interest in a contract or other transaction of a charter school sponsored by the Board in Texas.

#### Section 7.5 Interpretation of Articles of Incorporation

In any instance in which the provisions of these Bylaws are in conflict with the provisions of the Articles of incorporations, the provisions of the Bylaws control.

#### Section 7.6 Robert's Rules

All Board meetings and committee meetings shall be conducted in accordance with Roberts Rules of Order. In any instance in which the provisions of these Bylaws are in conflict with the provisions of Robert's Rules of Order, the provisions of the Bylaws shall control.

### ARTICLE 8 AMENDMENTS

#### Section 8.1 Bylaws

These bylaws may be adopted or these Bylaws may be amended or repealed by a majority vote of the Board of Directors.

### CERTIFICATE OF ADOPTION OF BYLAWS

I certify that I am the elected and acting Secretary of Somerset Academy, Inc., a Florida nonprofit corporation, and that the foregoing Bylaws constitute the Bylaws of such corporation as adopted by the Board of Directors.

  
\_\_\_\_\_  
SECRETARY

January 2014  
\_\_\_\_\_  
DATE



*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

# ***APPENDIX D SAMPLE MANAGEMENT AGREEMENT***

**For:  
SOMERSET PARKS  
ACADEMY  
CHARTER SCHOOL**

CHARTER SCHOOL EDUCATIONAL SERVICES AND SUPPORT AGREEMENT  
BETWEEN  
SAMPLE CHARTER SCHOOL, INC  
AND  
ACADEMICA

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## **CHARTER SCHOOL EDUCATIONAL SERVICES AND SUPPORT AGREEMENT**

This Agreement to provide Educational Services and Support to a Charter School is by and between -  
SAMPLE CHARTER SCHOOL, INC. ("CharterSchoolCorp") and ACADEMICA ("Service Provider")

**WHEREAS**, SAMPLE CHARTER SCHOOL, INC has a contract ("the Charter") with Sponsor County Public Schools (the "Sponsor") to operate a charter school, known as Sample Charter School (the "School");

**WHEREAS**, School is governed by the Board of Directors of SAMPLE CHARTER SCHOOL, INC (the "Board");

**WHEREAS**, academic control and freedom are integral to the success of the School and the Board must have complete autonomy and control over its academic program, staffing needs, and curriculum;

**WHEREAS**, CharterSchoolCorp desires academic support and related services to ensure that its School is operated in accordance with the requirements of its Charter and the requirements of all State and Federal laws, as well as the requirements of local, municipal and/or county ordinances which may be applicable to the operation of the School;

**WHEREAS**, Service Provider is an educational service provider established to provide professional services and related support to public charter schools;

**WHEREAS**, it is Service Provider's mission to ensure that the vision of the School's Board of Directors is faithfully and effectively implemented;

**WHEREAS**, it is Service Provider's duty to implement the vision of the Board of Directors, ensuring the autonomy and governing authority of the Board of Directors; and the Board of Directors' duty to make all decisions and direct Service Provider to act accordingly on the Board's behalf.

**WHEREAS**, Service Provider's officials are familiar with governmental agencies and requirements needed to establish and operate public charter schools as well as requirements of the Charter, all State and Federal authorities, and the local municipal and/or county government(s) which may be applicable to the operation of the School;

**WHEREAS**, Service Provider's officials are familiar with the various local, state and/or federal funding sources for charter school programs and have successfully obtained grants and other forms of revenue and financing for various charter school programs in Florida;



**WHEREAS**, Service Provider works with a network of charter schools and has found there are benefits to establishing charter school cooperatives and sharing best-practices and resources, including methods of reporting, record-keeping and accountability systems; and

**WHEREAS**, CharterSchoolCorp and Service Provider desire to enter into this agreement for the purpose of having Service Provider provide academic support services and related administrative services to the School at the direction and to the extent instructed by the Board of Directors;

**NOW THEREFORE**, the parties to this Agreement agree as follows:

**DUTIES OF SERVICE PROVIDER:**

1. **Recitals:** The foregoing recitals are true, correct and incorporated herein by this reference.

2. **Engagement**

CharterSchoolCorp engages Service Provider to provide support and administrative services to School as more fully set forth herein. Service Provider accepts such engagement pursuant to the terms of this Agreement.

3. **Duties**

At the direction of the Board, Service Provider will coordinate the educational and administrative services required to support the School. In connection with this, Service Provider will report to the Board and advise it of the systems established for administrative duties, including those related to initial setup and the ongoing operational budget. In providing services, Service Provider will comply with all Board and School policies and procedures, the Charter, and with all applicable state and federal rules and regulations. If instructed by the Board, Service Provider's services may include, but not be limited to: identification of potential school-sites; assistance with staff recruitment; assistance with human resource coordination; regulatory compliance; legal and corporate upkeep; assistance with maintenance of the, School and Corporate, assistance with bookkeeping, budgeting and financial forecasting. The Board will review all recommendations made by Service Provider and act upon them in the manner the Board decides.

4. **Board of Directors Meetings**

Service Provider will assist in the coordination of, and attend, the meetings of the Board. Unless otherwise instructed by the Board, Service Provider shall maintain the minutes and records of those meetings and ensure that the School complies with the requirements of State law, and the Charter, regarding such meetings and record keeping.

**5. Record Keeping**

Service Provider will maintain the records of the School at the location designated by the Board, and in compliance with the State and Charter requirements for record keeping. In addition, Service Provider will ensure that designated on-site School staff receive proper training by the Sponsor's appropriate departments for student/school record keeping through its designated Management Information Services (MIS) programs and proper training regarding public records.

**6. Bookkeeping**

At the direction of the Board, Service Provider will coordinate with the accounting firms selected by the Board and serve as liaison with them to ensure the accuracy and timeliness of financial reporting, record keeping, and audits as may be required by the Charter and State law.

**7. Staff Administration**

At the direction of the Board, Service Provider will coordinate with the Board to assist in the identification, advertising efforts, and/or recruitment efforts of qualified principals, teachers, paraprofessionals, administrators and other staff members and education professionals for positions in the School for employment by School. The Board will make all hiring decisions in its discretion and in accordance with law. All employees selected by the Board shall be CharterSchoolCorp employees and will not be employees of Service Provider. The Board will have complete discretion to decide which professional employee management company and its method of human resource management to use, if any.

The teachers employed by the School will be certified as required by Chapter 1002.33, Florida Statutes. CharterSchoolCorp may employ or contract with skilled selected non-certified personnel to assist instructional staff members such as teachers' aides in the same manner as defined in Chapter 1002.33, Florida Statutes and Florida Charter School Legislation. If the Board so chooses, Service Provider may coordinate with the Board, or the Hiring Committee established by the Board, to identify and recruit individuals for School-based positions. As stated above, the Board will make all hiring decisions in its discretion and in accordance with law. All employees selected by the Board for school-based positions shall be CharterSchoolCorp employees and will not be employees of Service Provider. All School-based employees shall be assigned to the School, and may only be removed, dismissed, or transferred by Board approval. Service Provider may, at the direction of the Board, assist in the preparation of employment contracts for review and approval by the Board. Service Provider may propose a professional employer organization to the Board which can perform the human resource outsourcing services for the School. If the Board, in its discretion, approves a human resource outsourcing provider, Service Provider may assist in the coordination of

these services, and agrees to act as the liaison for the School vis-à-vis the professional employer organization. The Board will have complete discretion to decide which, if any, professional employer organization, and its method of human resource outsourcing services, to use.

**8. Financial Projections and Financial Statements**

Service Provider will prepare annual budgets and financial forecasts for the School to present to the Board for review and approval or disapproval. The School will utilize the standard state codification of accounts as contained in the Financial and Program Cost Accounting and Reporting for Florida Schools, or shall utilize GAAP Accounting and/or other applicable guidelines, at the direction of the Board, as a means of codifying all transactions pertaining to its operations. The Board shall annually adopt and maintain an operating budget. The Board, based on recommendations made by a certified public accounting firm, will adopt accounting policies and procedures. Service Provider will prepare, with the review and approval of the Board, regular unaudited financial statements, as required, to be delivered to the Sponsor, which will include a statement of revenues and expenditures and changes in fund balances in accordance with generally accepted accounting principals. These statements will be provided in advance of the deadline for submission of such reports to the Sponsor. CharterSchoolCorp will provide the Sponsor with annual audited financial reports as required by the Charter. These reports will be prepared by a qualified independent, certified public accounting firm. Service Provider will provide the regular unaudited financial statements, books and records to the auditor for review in connection with the preparation of the reports. The reports shall include a complete set of financial statements and notes thereto prepared in accordance with the Charter and generally accepted accounting principals for inclusion into the School's financial statements annually, formatted by revenue source and expenditures and detailed by function and object.

**9. Designated Contact Person**

The designated contact person of Service Provider shall be the President of Academica (currently Fernando Zulueta). An alternate contact person shall be the Vice-President and Director of Operations (currently Maggie Fresen).

**10. Grant Solicitation**

In consultation with the Board, and with Board approval, Service Provider will solicit grants available for the funding of the School from the various government, private and institutional sources which may be available. Such grants may include, but are not limited to federal grants programs and various continuation grants for charter schools.

**11. Financing Solicitation and Coordination**

If directed by the Board, Service Provider may coordinate obtaining financing from private and public sources for loans desired by the Board.

**12. Other Funding Sources**

If directed by the Board, Service Provider will coordinate the solicitation of Capital Outlay Funds, if available, from the appropriate state and/or local agencies. Similarly, as directed by the Board, Service Provider will coordinate the solicitation of other available state, federal, or local government funds earmarked for schools and/or facilities development, improvement, or acquisition, as well as other sources of funding that may become available to charter schools from time to time.

**13. Annual Reporting**

Service Provider will coordinate the preparation of the Annual Report required by the Charter School Legislation for the School. The Report will be submitted to the Board for approval, and Service Provider will coordinate the delivery and review process established by the Sponsor and Charter School legislation for the Annual Report.

**14. Student Assessment**

At the direction of the Board, Service Provider may coordinate a student assessment methodology, independent from State and/or Sponsor required assessments, and retain on behalf of CharterSchoolCorp professionals to administer and evaluate results. Service Provider will provide the Board with proposals from professionals offering to provide assessment and student evaluation services for the Board either to approve or reject.

**15. School Board Representation**

At the direction of the Board, Service Provider may serve as primary liaison with the Sponsor and its officials on behalf of the School. In connection therewith, Service Provider's representatives will attend required meetings and public hearings.

**16. Governmental Compliance**

At the request of the Board, Service Provider will ensure compliance with state regulations and reporting requirements of the Charter School. Service Provider will also ensure the School's compliance with its Charter with the Sponsor, a copy of which is incorporated herein by reference.

**17. Charter Renewal Coordination**

At the direction of the Board, Service Provider will coordinate with the Sponsor and assist the Board and School in the renewal of the School's Charter on a timely basis. On behalf of, and with the direction of the Board, Service Provider will negotiate the terms of the renewal Charter with the Sponsor, and will provide the Board with notice of and will seek Board approval of any renewal provisions which modify or alter the terms of the original Charter between the School and the Sponsor.

**18. Curriculum Development**

At the direction of the Board, Service Provider shall identify and or develop curricula in connection with the operations of the School and the vision of the Board in a manner that complies with applicable federal, state and local laws and regulations. All curricula shall be approved by the Board prior to use.

**19. Pre-School, After-Care, Early Drop-Off**

Service Provider shall identify and/or develop Pre-School, After-Care, and/or Early Drop-Off programs that may be offered as services ancillary to, but separate from the operations of the School. These are programs that are not encompassed by the Charter School Agreement between the School and the Sponsor. Accordingly, the School may elect not to offer these programs directly, but rather to authorize Service Provider to do so. In furtherance of that, Service Provider will retain the necessary operators to provide the underlying services to the parents and students desiring them. Service Provider will coordinate the provision of those services directly where applicable and establish agreements to reimburse the School for the use of the facilities, utilities, cleaning services and other costs consumed or incurred by those uses. Service Provider and/or the selected service providers shall be the direct primary supplier to the parents and students of those ancillary services and will indemnify and hold harmless the School for any liability resulting from them. The terms and conditions for these programs including financial terms, operating procedures, and ownership, shall be subject to Board review and approval.

**20. School-Site Identification**

At the direction of the Board, Service Provider shall coordinate with the Board for the purpose of identifying CharterSchoolCorp's school-site needs from year-to-year. In connection therewith, Service Provider shall assist the Board in identifying potential school sites or in the potential expansion of existing sites. Service Provider may identify and solicit investors to acquire and/or develop school sites for lease or use by CharterSchoolCorp. Where such investors are related to Service Provider or its principles, such relationship will be disclosed to the Board. At the direction of the Board, Service Provider shall recommend qualified professionals, who the Board may retain, in the fields of school design, architecture, and engineering, as well as professionals in

the areas of development and construction, for the expansion, design, development, and/or construction of new and/or existing school sites.

**21. Systems Development**

For the benefit of and at the direction of the Board, Service Provider will identify and develop a school information system to be used in connection with the administration and reporting system for the School. This includes, but is not limited to, accounting documentation filing systems, student records systems, computer systems, and telecommunications services.

**TERM OF AGREEMENT**

**22. Initial Term**

The term of the Agreement shall commence on the start of the 2016-2017 school year. The commencement date shall be deemed to be July 1, 2016, although the parties recognize that Service Provider has provided services to the Board in connection with the School and Charter before this date.

The initial term of this Agreement shall be five (5) years, unless the Board for cause terminates this Agreement per section 24 of this Agreement. At the conclusion of the term of this Agreement, CharterSchoolCorp shall have the option to renew this contract with Service Provider.

**23. Renewal**

Unless terminated by the Board, the terms of this Agreement shall be renewed along with any renewals to the Charter Agreement. Service Provider agrees to renew this Agreement at CharterSchoolCorp's option on the then-current terms and conditions unless there has been an uncured material breach hereunder by CharterSchoolCorp, after 60 days written notice of such breach and demand for cure, or unless CharterSchoolCorp has given at least 90 days' notice that this Agreement will not be renewed.

**24. Termination**

In the event of a breach of this Agreement by either party, the non-breaching party shall give the other party written notice of such breach and sixty (60) days to cure such breach from the date of giving such notice to Service Provider. "Breach" shall be defined as a material breach of this Agreement by Service Provider or CharterSchoolCorp; the failure of Service Provider to provide educational support and related services sufficient to operate the School in a manner that complies with the standards of the Sponsor; any debarment of or similar action against Service Provider by any governmental entity; or any action or conduct by Service Provider or its principals that may bring disrepute to the School or Board (e.g., any arrest or conviction for a crime of moral turpitude or any

felony) or that may endanger or materially lessen the safety of students. If the Sponsor terminates or materially changes its Charter Agreement with the School or Board for the operation of the School, either the School or Board, or Service Provider may upon thirty (30) days written notice terminate this Agreement without penalty or liability of any kind to either party. Either party may terminate this Agreement at any time and for any reason, irrespective of cause, upon providing the other party 90 days' notice of termination. In the event of termination of this Agreement for any reason, the compensation to be paid by CharterSchoolCorp to Service Provider under this Agreement shall be pro-rated.

## **COMPENSATION**

### **25. Base Compensation**

CharterSchoolCorp shall pay Service Provider a service fee of \$450 per student Full Time Equivalent (FTE) per annum during the term of this Agreement, unless terminated, provided CharterSchoolCorp receives such funds. The fee shall be payable in equal monthly installments, provided that CharterSchoolCorp shall have no obligation to pay such fee before receiving its FTE funding from the Sponsor or the State of Florida, in which event the monthly installments shall accrue until funding is received. The service fee shall be adjusted annually at each anniversary of this Agreement based on the change in the prior year's Consumer Price Index or on the basis of the year-to-year percentage change in the per student Full Time Equivalent (FTE) funding provided to the school under the law, whichever is less, but in no event shall any adjustment reduce the service fee below the initial level of \$450 per student Full Time Equivalent (FTE) per annum as stated above.

### **26. Additional Services**

Service Provider will provide additional services not covered under this Agreement to the Board as requested by the Board by proposal to Service Provider and the Board and subject to Board approval. This may include services that are not within the regular course of running the School, including but not limited to special projects, litigation coordination, and land use coordination. Such projects may include the engagement, at the expense of CharterSchoolCorp, of other professionals or consultants who may be independent from Service Provider or part of Service Provider's network of consulting professionals.

### **27. Reimbursement of Costs**

Service Provider shall be reimbursed for actual costs incurred in connection with travel, lodging, and food, attending required conferences and other events on behalf of the School, provided that the Board shall give prior written approval for such cost.

**28. Incurred Expenses**

Pursuant to the agreement of the Board and Service Provider, Service Provider, in its discretion, may defer some or all of the service fees and/or costs for additional services and/or reimbursements due hereunder from one fiscal year to the next, which will be duly noted in the schools financial records.

**OTHER MATTERS**

**29. Conflicts of Interest**

No officer, shareholder, employee or director of Service Provider may serve on the Board. Service Provider will comply with the Conflicts of Interest rules set out in the Charter. In addition, if there exists some relationship between Service Provider, its officers, directors or principals and any other person or entity providing goods or services to the School, Service Provider agrees to disclose the relationship to the Board.

**30. Insurance and Indemnification**

Service Provider shall carry liability insurance and indemnify the School for acts or omissions of Service Provider. Service Provider agrees to provide, upon request of the Board, certificates of insurance with carriers, in amounts and for terms reasonably acceptable to the Board and naming Board as additional insured. School shall carry liability insurance and indemnify the Service Provider for acts or omissions of School. School agrees to provide, upon request of the Service Provider, certificates of insurance with carriers, in amounts and for terms reasonably acceptable to the Service Provider, and naming Service Provider as additional insured.

School shall indemnify and save Service Provider harmless from and against, and shall reimburse Service Provider for, any and all liabilities, obligations, damages, fines, penalties, claims, demands, costs, charges, judgments and expenses, whether founded in tort, in contract, or otherwise, (including the costs of defense and settlement and reasonable attorney's fees) which such party may incur, become responsible for, or pay out as a result of claims connected to the acts, services, conduct or omissions of School, its employees or agents, attorney's fees and costs, which may be imposed upon or incurred or paid by or asserted against Service Provider by reason of or in connection with the performance of any provision of this Agreement, or any act or neglect of School or Schools officers, directors, trustees, agents, contractors, servants, employees, invitees, in connection with Schools obligations under this Agreement. In the event Service Provider shall, without fault on its part, be made a party to any litigation commenced by or against School, then School shall protect and hold Service Provider harmless and shall pay all costs, expenses, and attorney's fees incurred by Service Provider in connection with such litigation, including any appeals.



Nothing contained in this provision shall be deemed to require School to indemnify Service Provider for any acts or omissions of Service Provider, its agents, contractors, servants, employees, licensees, or invitees, or for breach of this Agreement, nor shall this provision be deemed to require School to indemnify Service Provider for Service Provider's own gross negligence, or the gross negligence of Service Provider's agents, contractors, servants, employees, licensees, or invitees, nor shall this provision operate to release Service Provider from its own affirmative duties with respect to this Agreement.

Service Provider shall indemnify and save School harmless from and against, and shall reimburse School for, any and all liabilities, obligations, damages, fines, penalties, claims, demands, costs, charges, judgments and expenses, whether founded in tort, in contract, or otherwise, (including the costs of defense and settlement and reasonable attorney's fees) which such party may incur, become responsible for, or pay out as a result of claims connected to the acts, services, conduct or omissions of Service Provider, its employees or agents, attorney's fees and costs, which may be imposed upon or incurred or paid by or asserted against School by reason of or in connection with the performance of any provision of this Agreement, or any act or neglect of Service Provider or Servicer Providers officers, directors, trustees, agents, contractors, servants, employees, invitees, in connection with Schools obligations under this Agreement. In the event School shall, without fault on its part, be made a party to any litigation commenced by or against Service Provider, then Servicer Provider shall protect and hold School harmless and shall pay all costs, expenses, and attorney's fees incurred by School in connection with such litigation, including any appeals.

Nothing contained in this provision shall be deemed to require Service Provider to indemnify School for any acts or omissions of School, its agents, contractors, servants, employees, licensees, or invitees or for breach of this Agreement, nor shall this provision be deemed to require Service Provider to indemnify School for School's own gross negligence, or the gross negligence of School's agents, contractors, servants, employees, licensees, or invitees, nor shall this provision operate to release School from its own affirmative duties with respect this Agreement.

Notwithstanding anything stated in this Agreement to the contrary, the Agreement and all provisions contained herein shall be subject to and governed by F.S. 768.28 as amended.

### **31. Miscellaneous**

(1) Neither party shall be considered in default of this Agreement if the performance of any part or all if this Agreement is prevented, delayed, hindered or otherwise made impracticable or impossible by reason of any

strike, flood, hurricane, riot, fire, explosion, war, act of God, sabotage, accident or any other casualty or cause beyond either party's control, and which cannot be overcome by reasonable diligence and without unusual expense.

(2) This Agreement shall constitute the full, entire and complete agreement between the parties hereto. All prior representations, understandings and agreements are superseded and replaced by this Agreement. This Agreement may be altered, changed, added to, deleted from or modified only through the voluntary, mutual consent of the parties in writing, and said written modification(s) shall be executed by both parties. Any amendment to this Agreement shall require approval of the Board.

(3) Neither party shall assign this Agreement without the written consent of the other party;

(4) No waiver of any provision of or default under this Agreement shall be deemed or shall constitute a waiver of any other provision or default unless expressly stated in writing.

(5) If any provision or any part of this Agreement is determined to be unlawful, void or invalid, that determination shall not affect any other provision or any part of any other provision of this Agreement and all such provisions shall remain in full force and effect.

(6) This Agreement is not intended to create any rights of a third party beneficiary.

(7) This Agreement is made and entered into in the State of Florida and shall be interpreted according to and governed by the laws of that state. Any action arising from this Agreement, shall be brought in a court in County, Florida.

(8) In the event of a dispute arising from this Agreement, the prevailing party shall be awarded reasonable attorneys' fees and costs.

(9) Every notice, approval, consent or other communication authorized or required by this Agreement shall not be effective unless same shall be in writing and sent postage prepaid by United States mail, directed to the other party at its address hereinafter provided or such other address as either party may designate by notice from time to time in accordance herewith:

Academica  
6340 Sunset Drive  
Miami, Florida 33143  
Attn: President

Sample Charter School Inc.  
ADDRESS LINE 1  
ADDRESS LINE 2  
Attn: Chairperson

(10) The headings in the Agreement are for convenience and reference only and in no way define, limit or describe the scope of the Agreement and shall not be considered in the interpretation of the Agreement or any provision hereof.

(11) This Agreement may be executed in any number of counterparts, each of which shall be an original, but all of which together shall constitute one Agreement.

(12) Each of the persons executing this Agreement warrants that such person has the full power and authority to execute the Agreement on behalf of the party for whom he or she signs.

THIS AGREEMENT was approved at a meeting of the Board of Directors of SAMPLE CHARTER SCHOOL, INC held on the \_\_\_\_\_ day of \_\_\_\_\_ 2015. At that meeting, the undersigned Director of SAMPLE CHARTER SCHOOL, INC was authorized by the Board to execute a copy of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Contract as of the day and year first above written.

CharterSchoolCorp

**(For SAMPLE CHARTER SCHOOL)**

By: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_, Chair / President

**ACADEMICA**

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Fernando Zulueta, President



*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

# ***APPENDIX E SAMPLE PARENT CONTRACT***

**For:  
SOMERSET PARKS  
ACADEMY  
CHARTER SCHOOL**

### **Sample Academy Inc. Parent/Guardian Contract**

I, the undersigned parent/guardian of \_\_\_\_\_, hereby agree to abide by the following policies and procedures of \_\_\_\_\_.

- **Absences:** In accordance with School and BCPS Daily Attendance Policies, students must be physically present in school for a minimum of 2 hours in order to be counted as present for attendance purposes each day. For each day a student is absent, Parents/guardians must submit supporting documentation explaining the reason for the absence. Documentation submitted more than 3 days (72 hours) after the student's return to school will not be accepted, and the absence(s) will be deemed unexcused. Students with excessive absences will be referred to the administration/Attendance Review Committee. Referrals will be issued after reaching the school's maximum allowance, and may result in the student's report card reflecting insufficient attendance for receiving a grade. Please be advised: for students in grades 9-12, five (5) or more unexcused absences in a semester course or ten (10) or more in an annual course, may result in the withholding of a student's grade.
- **Arrival:** Arrival time is from \_\_\_\_\_ am to \_\_\_\_\_ am. Students must be in their seats at the commencement of homeroom in the morning. Any student arriving after the commencement of homeroom will receive a tardy pass. Students arriving or departing outside of the School's designated times may be enrolled in a before-care program, where available, including all applicable fees. Please be advised: Sample Academy is not responsible for students who arrive more than thirty (30) minutes prior to the start of school, except for those who are enrolled in and pay fees to the before-care program. Traffic patterns for arrival and dismissal (as described in the Parent Handbook) must be strictly followed. Violation of any policy regarding health, safety, and welfare issues, including but not limited to, non-adherence to approved traffic patterns, will be documented. Any such violations shall be considered serious infractions and will not be tolerated.
- **Tardies:** All tardies are unexcused. If students arrive after the commencement of school, please do not send the student to class. Students arriving after the commencement of school must report directly to the School's designated office/area. Students with excessive tardies will be referred to the administration/Attendance Review Committee.
- **Dismissal:** Dismissal time is \_\_\_\_\_ pm. Students departing outside of the School's designated times may be enrolled in an after-care program, where available, including all applicable fees. Please be aware that all charges must be resolved in full by the last day of school. Please be advised that Somerset Academy is not responsible for students remaining on campus after the School's dismissal times, except for those who are enrolled in and pay fees to the after-care program. Traffic patterns for arrival and dismissal (as described in the Parent Handbook) must be strictly followed. Violation of any policy regarding health, safety, and welfare issues, including but not limited to, non-adherence to approved traffic patterns, will be documented. Any such violations shall be considered serious infractions and will not be tolerated.
- **Early Dismissal:** For a student to be dismissed early, parents must report to the designated office/area. Students with excessive unexcused early dismissals will be referred to the administration/Attendance Review Committee. Students will not be dismissed 30 minutes prior to dismissal time without previous written notice. There are NO EXCEPTIONS!
- **Unauthorized Items Policy:** Please note that students are not allowed to bring any toys, electronic devices, pets, or animals to school. Cell phones may not be turned on inside of the School building at any time. Cell phones may not be visible at any time during the School day, may not be displayed during School, and must be left in the Students bag. The School will confiscate any unauthorized items a student may bring to school. Confiscated items will only be returned to parents at which time a parent/student conference may be required. The school may keep any such unauthorized items until the end of the school year. Continued violations of this policy may result in further penalties, and may subject the student to disciplinary action and/or referral to the School's administration/discipline review

committee. While the School will take every measure to protect such items, the School shall not be responsible for loss or damage to any unauthorized items which have been confiscated. Any items not claimed by the last day of school shall be disposed of without further liability to the School.

- **Uniform Policy:** Official School uniforms must be worn every day. Students who arrive to school without proper uniform may be referred to the administration and may not return to class until in proper uniform. Students with repeated violations of this policy will be referred to the administration/Discipline Review Committee.
- **Volunteer Hours:** Parental/Guardian involvement is a critical component of your child's educational success. Sample Academy prides itself on the success of our students and therefore requires that parents/guardians become active stakeholders in their child's future. All Sample Academy parents/guardians are asked to complete thirty (30) volunteer hours, or the equivalent, per academic year. All parent/guardian volunteer hours must be completed prior to the last day of school.
- **Academic Recovery:** If the School identifies your student as requiring additional instruction and/or remediation including but not limited to: mandatory tutoring, summer school, etc., attendance at and successful completion of same shall be required. Alternative and/or make-up sessions may be scheduled at the discretion of the administration.
- **Outstanding Fees:** Failure to pay all outstanding fees may result in the loss and/or suspension of extra-curricular activity privileges. Fees may include but shall not be limited to: lost books, late library fees, lunch accounts, before/after care fees, and any and all fees which may accrue in the normal course of the school year.
- **Internet and Media Use Policy:** No recording, either photographic or audio/visual in nature may be made on school property without the express authorization of the administration. No document or media existing now or in the future and which impacts the School and/or disrupts the learning environment, relating to the School, its staff or students, including but not limited to photographs, letters, yearbooks, and other material may be published in any public forum or media without the express authorization of the administration. Furthermore, the unauthorized use of the Somerset Academy name and/or any of its logos is expressly prohibited. For purposes of this section, the term "public forum or media includes but shall not be limited to publicly accessible websites and web forums, newspapers, print and other media sources.
- **Broward County Public Schools:** Please note: all students enrolled in \_\_\_\_\_ Academy are subject to applicable policies outlined in the \_\_\_\_\_ Academy Parent and Student Handbook in addition to applicable policies outlined in the Broward County Public Schools Student Code of Conduct.

**We understand the policies set forth in this Sample Academy Parent/Guardian Contract and will abide by them. Failure to adhere to the policies as stated in the Parent/Guardian Contract will result in a violation of the contract.**

**Student's Name:** \_\_\_\_\_

**Grade:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Parent Name:** \_\_\_\_\_

X

\_\_\_\_\_  
Parent Signature



*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

# ***APPENDIX F SAMPLE JOB DESCRIPTION***

**For:  
SOMERSET PARKS  
ACADEMY  
CHARTER SCHOOL**

## THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

### JOB DESCRIPTION

|                         |                                                                   |
|-------------------------|-------------------------------------------------------------------|
| <b>POSITION TITLE:</b>  | School Principal                                                  |
| <b>CONTRACT YEAR:</b>   | Twelve Months                                                     |
| <b>PAY GRADE:</b>       | School-based Administrators Salary Schedule – Category C, D, or E |
| <b>BARGAINING UNIT:</b> | Broward Principals and Assistants Association (BPAA)              |

### PREFERRED QUALIFICATIONS

**EDUCATION:** An earned master's Degree from an accredited college or university. Technical Center Director may substitute Advanced Vocational Certificate.

**EXPERIENCE:** A total of five (5) years of school experience is required; which includes a minimum of three (3) years of required experience as a Principal, Assistant School Principal, or District Administrator, as outlined in School Board Policy 4002.14.

**CERTIFICATION:** Valid Florida Certification in School Principal, or Professional School Principal; however when deemed necessary and in the best interest of students of the school an individual who holds a certificate in Educational Leadership, Administration or Administration & Supervision at the appropriate level of the assigned school may be recommended for appointment as an interim principal for a period not to exceed one (1) year during which the individual must complete the Human Resource Management applicable interim principal program. The principal internship may be waived for an out-of-county applicant with principal experience or in other special circumstances as determined by the Superintendent. Appointment under these circumstances will be as interim principals.

### ADDITIONAL QUALIFICATIONS

**REQUIRED:** Computer skills as required for the position

**PREFERRED:** Bilingual skills



### **ADDITIONAL CERTIFICATION REQUIRED**

1. Adult Center Principal - Certification in administration of adult education.
2. Exceptional Student Center Principal – master’s degree level certification in any area of exceptional student education.
3. Community School Principal – at least one (1) college course in community school administration preferred; completion of this course required during the first year of appointment to this position.
4. Technical Center Director - Meet requirements for certification in a vocational subject and be eligible for a certificate covering Director of Vocational Education.

### **ADDITIONAL EXPERIENCE REQUIRED**

1. ESE Center Principal requires two (2) of the five (5) years of experience must be in Exceptional Student Education, as outlined in School Board Policy 4002.14. Technical Center Director requires five (5) years vocational educational experience, as outlined in School Board Policy 4002.14.
2. Satisfactory completion of a district-approved leadership training program or its equivalent.

### **REQUIRED KNOWLEDGE, SKILLS AND ABILITIES**

The School Principal will effectively perform the performance responsibilities using the following knowledge, skills and abilities: Ability to: prepare and manage the school's budget and manage and inventory the school's assets; to read, interpret, follow and enforce the State Board Rules, Code of Ethics, School Board policies, and other state and federal laws; use effective interview techniques, coaching procedures, and evaluation procedures; enforce collective bargaining agreements; use effective public speaking skills, group dynamics, and interaction and problem solving skills; maintain a sensitivity to multicultural issues; perceive the impact of a decision on other components of the organization; communicate effectively, both orally and in writing, and through use of technology; and analyze and use data. The School Principal will need knowledge of current educational trends and research. Knowledge and understanding of the unique needs and characteristics of school system.

### **REPORTS TO:**

Director, School Performance & Accountability

|                       |                                                                                                                                                                                                                                                      |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>SUPERVISES:</b>    | All Administrative, Instructional, and Service Personnel assigned to the school.                                                                                                                                                                     |
| <b>POSITION GOAL:</b> | To provide the leadership and management necessary to administer and supervise all programs, policies and activities of the school to ensure high quality educational experiences and services for the students in a safe and enriching environment. |

## **ESSENTIAL PERFORMANCE RESPONSIBILITIES**

**The School Principal shall effectively manage through:**

### **LEADERSHIP:**

1. Establish and monitor a school mission and goals that are aligned with the district's mission and goals.\*
2. Exercise proactive leadership in promoting the vision and mission of the District's Strategic Plan and Sterling Quality Initiatives.
3. Model and maintain high standards of professional conduct.
4. Set high standards and expectations for self, others, and school.
5. Demonstrate satisfactory or above performance on the Florida Principal competencies while performing all duties required by the district job description.
6. Provide leadership in the implementation of the Sunshine State Standards, Florida Write, Florida Comprehensive Assessment Test (FCAT) and other tests designed and adapted to measure student achievement.
7. Maintain active involvement in the school improvement planning process with the School Advisory Council (SAC) by providing resources for decision making and priority setting.\*
8. Use quality improvement principles and process in daily administration of school.\*
9. Implement procedures and policies that ensure a safe and orderly learning environment.
10. Anticipate difficult situations and develop plans to handle them.
11. Manage and administer the development, implementation and assessment of the instructional program at the assigned school so as to ensure student growth and achievement is continuous and appropriate.
12. Use collaborative leadership style and quality processes to involve stakeholders in establishing and achieving the school's mission and goals.\*
13. Provide leadership and direction for all aspects of the school's operation.
14. Build teams to accomplish plans, goals and priorities.
15. Conduct staff meetings to discuss policy changes, instructional programs, potential problems and resolution of existing problems.
16. Use appropriate interpersonal styles and methods to guide individuals or groups to task accomplishment.
17. Establish and utilize the Sterling process to ready the school and community for change.\*
18. Develop and maintain a school atmosphere conducive to learning and student achievement.\*

19. Maintain visibility and accessibility on the school campus and at school related activities and events.
20. Establish procedures used in the event of school crisis and/or civil disobedience and provide leadership in the event of such incidents.
21. Act quickly to stop possible breaches of safety, ineffective procedures, or interference with operations.
22. Provide leadership to involve the school in quality initiatives.\*
23. Establish procedures for an accreditation program and monitor standards to ensure they are met.
24. Communicate school information, goals, student learning and behavior expectations to all customer groups.\*
25. Use effective communication techniques with students, teachers, parents and stake holders.
26. Provide for the articulation of the school's instructional program among school personnel and the public by developing and maintaining a timely and informative school website and newsletter.
27. Communicate, through proper channels, to keep the District administration informed of impending problems or events of an unusual nature.
28. Communicate effectively both orally and in writing with parents, students, teachers and the community.
29. Participate in the planning and implementation of initiatives in the Innovation Zone.

#### **INFORMATION & ANALYSIS:**

30. Collect and maintain information appropriate to the continual monitoring of all Sterling Quality goals.\*
31. Provide leadership and direction for the implementation and evaluation of curriculum and instruction at the assigned school.
32. Address the diverse needs of the school population consistent with the District's Strategic Plan.
33. Analyze and use data for decision-making to improve actions, plans, and processes.\*
34. Use current research, performance data, and feedback from students, teachers, parents and community to make decisions related to improvement of instruction.
35. Access, analyze, interpret and use data in decision-making.
36. Use key information such as benchmarks and comparison data in the analysis of results to effectively measure performance.\*
37. Make data accessible to all stakeholders.\*

#### **STRATEGIC QUALITY PLANNING:**

38. Develop long and short- term plans and goals within the School Improvement Plan, aligned with the strategic plan of the district.\*
39. Collaborate and provide resources to ensure the development of the School's Improvement Plan.
40. Set high goals and standards for self, others and the organization.
41. Establish and actively pursues a vision and mission for the school in collaboration with staff, parents, students, and other stakeholders which is also aligned with the District's strategic plan.

42. Communicate overall School Improvement Plan requirements to all staff so they can describe how the goals and plans relate to their work.\*
43. Oversee the selection and acquisition of instructional materials and equipment.
44. Collect input and analyze data to develop goals.
45. Manage student accounting at the assigned school as it relates to Florida Education Finance Program (FEFP) funding and future planning.
46. Direct the development of the master schedule and assign teachers according to identified needs.
47. Allocate resources consistent with implementation of the School Improvement Plans.\*
48. Utilize a systematic process for collecting input from stakeholders and incorporates customer requirements in development of School Improvement Plan.\*
49. Establish procedures to monitor processes, manage assets and inventories, activities and responsibilities and respond to feedback.
50. Establish and coordinate procedures for student, teacher, parent and community evaluation of curriculum.
51. Facilitate the horizontal and vertical articulation of curriculum within the school as well as between the school and its feeder system.
52. Provide recognition and celebration for student, staff, and school accomplishments.

**CUSTOMER FOCUS:**

53. Develop positive relationships with customers (students, parents, teachers, community, etc.)\*
54. Facilitate a program of family and community involvement.
55. Serve as final arbitrator for serious discipline problems in accordance with District policy and state statutes.
56. Develop and maintain positive school/community relations and act as liaison between the two.
57. Promote/market the school and its priorities to the community.
58. Establish processes and methods to respond to valid customer requirements.\*
59. Facilitate, coordinate, and monitor the implementation of Student Education programs and services.
60. Implement procedures to ensure that rights of children with disabilities and parents of such children are protected.
61. Work with parents to resolve complaints or concerns.
62. Interact with government and service agencies relative to student welfare.
63. Establish processes to determine customer needs and level of satisfaction.\*
64. Establish guidelines for desirable student conduct and follow suspension and expulsion policies and procedures.
65. Supervise the implementation of the school's student services plan, including guidance, drop-out prevention, health services, attendance and related areas.
66. Take appropriate reporting and/or referral action whenever abuse situations are recognized.
67. Provide leadership support for community involvement programs and business partnerships at the school level.\*
68. Direct and develop the recruitment of Business Partners to benefit the school and community.

69. Develop activities with business partners that promote student achievement.

**HUMAN RESOURCES:**

- 70. Analyze data and information to plan staff development to accomplish school goals.\*
- 71. Complete annual Needs Assessment to determine staff development needs.
- 72. Lead and manage development of personnel through staff development, in-service and other developmental activities that are linked to student achievement gains and the school improvement plan.
- 73. Build a school community and environment which supports learning and growth for everyone toward realization of the school's mission.\*
- 74. Facilitate the development and implementation of an effective staff development program.
- 75. Participate in District management meetings and other activities to enhance professional development.
- 76. Participate, successfully, in the staff development programs offered to increase the individual's skill and proficiency related to the assignment.
- 77. Serve as a coach/mentor to assistant principals or others who are preparing for School Principal certification and/or are aspiring to leadership roles in the district.
- 78. Review current developments, literature and technical sources of information related to job responsibility.
- 79. Use team approaches in solving problems and improving processes and providing frequent feedback to those involved in improvement efforts.\*
- 80. Delegate responsibilities to appropriate staff members.
- 81. Consider data and results from action research when solving problems and improving processes.
- 82. Contribute to positive staff morale through flexibility, support and recognition of groups and individuals working toward school improvement.\*
- 83. Assign tasks and supervise personnel in task accomplishment including special projects.
- 84. Provide recognition and celebration for student, staff, and school accomplishments.
- 85. Manage appropriately and professionally personnel issues, including hiring, evaluation, staff deficiencies and retention; provides feedback on professional performance and offer assistance to strengthen weaknesses in performance.
- 86. Interview and select qualified personnel to be recommended for appointment.
- 87. Establish the job assignments and supervise all assigned personnel and conducts performance assessments according to School Board Policy and procedures, using instruments adopted by the School Board.
- 88. Establish and maintain individual professional development plans for each instructional employee that is linked to student achievement.
- 89. Make difficult personnel decisions according to policy when necessary including dealing with ineffective teacher or other staff performance.
- 90. Consider the aspirations of self and others in relation to the jobs and tasks assigned when assessing expertise and developmental needs.\*

**MANAGEMENT OF PROCESSES:**

- 91. Identify quality requirements of materials/services and communicate this information to parents, community and suppliers.\*

92. Access District and community resources to meet school needs.
93. Demonstrate readiness and confidence in making and/or sharing decisions in a timely fashion.
94. Employ an improvement cycle for operational problems that analyzes results, identifies root causes and takes corrective action.\*
95. Utilize PLAN, DO, STUDY, ACT (PDSA) and quality improvement tools to assess and improve curriculum and instructional systems, processes, programs and services.\*
96. Understand, support, and implement School Board, State, and Federal Policies, procedures, negotiated agreements and district decisions.\*
97. Administer negotiated employee contracts in the appropriate manner at the school site.
98. Implement School Board policy, state statutes, and federal regulations as they pertain to the assigned school.

**OPERATIONAL RESULTS:**

99. Show positive trends in the achievement of improvement goal results in the areas of Operation, business practices (efficiency) and customer satisfaction by implementing and monitoring the effectiveness of business practices .\*
100. Manage and supervise the school's financial resources including the preparation and disbursement of the school's budget and internal accounts.
101. Establish and manage student accounting and attendance procedures at the assigned school.
102. Supervise and monitor the accurate completion of data collection and submit resulting reports according to timelines.
103. Write and disseminate electronic newsletters, memos, letters, press releases, agendas, and other materials using proper grammar and punctuation.
104. Coordinate and manage the extra curricular student activities and funds at the assigned school.
105. Provide leadership in the effective use of emerging technology in the classroom, internal and external communications, and in school administration.
106. Coordinate school maintenance and facility needs and monitor progress toward meeting those needs.
107. Monitor the custodial program at the school to ensure a safe, clean, and healthy, learning environment.
108. Coordinate plant safety and facility inspections at the assigned school
109. Supervise transportation services at the assigned school.
110. Coordinate the school food service program at the assigned school including the free and reduced food service requirements.
111. Perform and promote all activities in compliance with equal opportunity and nondiscrimination policies of The School Board of Broward County, FL.
112. Participate successfully in the training programs offered to increase the individual's skill and proficiency related to the assignments.
113. Review current developments, literature and technical sources of information related to job responsibility.
114. Ensure adherence to good safety procedures.
115. Comply with district procedures to manage and safeguard district assets, equipment inventory, property leasing, and rental of School Board property.

116. Follow Federal and State laws, as well as School Board policies.
117. Perform other duties as assigned by the Director, School Performance & Accountability or designee, consistent with the goals and objectives of the position.

**SIGNIFICANT CONTACTS –frequency, contact, purpose, and desired end result:**

Develop and maintain positive school/community relations by promoting/marketing the school and its priorities to the community served. Communicate school information, goals, student learning and behavior expectations to all customer groups by using effective communication techniques with students, teachers, parents and stake holders.

**PHYSICAL REQUIREMENTS:**

Medium work: Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently and/or up to 10 pounds of force as needed to move objects.

**FLSA OVERTIME CATEGORY:**

Job is exempt from the overtime provisions of the Fair Labor Standards Act.

**TERMS OF EMPLOYMENT:**

Salary and benefits shall be paid consistent with the District's approved compensation plan. Length of the work year and hours of employment shall be those established by the district board.

**EVALUATION:**

Performance will be evaluated in accordance with Board Policy.

**\* Addresses the seven (7) Sterling Quality Initiatives**

Board Approved: 10/7/76 & 4/20/78

ER80-12 Approved: 10/2/80

Item G-7: 1/6/86

Revised: 6/17/97

Revised: 2/20/2001 &

Adopted: 3/20/2001

Revised: 3/7/05

Revised: 8/1/07

Revised: 09/10/2009

Adopted: 10/20/2009

Reporting Change: 10/01/12

2012-2013 Organizational Chart

## Job Descriptions

**POSITION TITLE:** Assistant Principal  
**CONTRACT YEAR:** Twelve Months

### QUALIFICATIONS

**EDUCATION:** Master's degree from an accredited educational institution. Valid Florida Certification in Educational Leadership, Administration, Administration & Supervision, School Principal or Professional School Principal at the appropriate level of the assigned school.

### EXPERIENCE

**REQUIRED:** Three (3) years minimum of school experience or district administrative experience. Completion of Leadership Experiences and Administrative Development (LEAD) program.

**REPORTS TO:** School Principal and School Board of Directors

**SUPERVISES:** Instructional and Service Personnel assigned by the principal.

**POSITION GOAL:** To assist the principal in providing vision and leadership to develop, administer and monitor educational programs that optimize the human and material resources, including time and space, available for a successful and safe school program for students, staff and community.

### ESSENTIAL PERFORMANCE RESPONSIBILITIES:

#### The Assistant Principal shall:

- Manifests a professional code of ethics and values.
- Respond to internal and external customers in a timely, accurate, courteous and empathetic manner representing OCPS in a positive light.
- Models the routine, intentional and effective use of technology in daily work, including communications, organization and management tasks.
- As delegated by the principal, manages the daily operations and functions of the school consistent with district goals.
- Administers policies that provide a safe and effective learning environment.
- Communicates the school's vision, mission and priorities to the community
- Serves as a member of the principal's leadership team and participates in the school's planning,



development and evaluation.

- Keeps the principal informed of current school critical issues and incidents about which he/she should be aware.
- Makes decisions in a timely fashion using the best available data.
- Communicates and interacts effectively with all stakeholders in the community
- Plans and schedules one's own and others' work so that priorities and goals can be met
- As designated by the principal, supervises and assesses teachers and staff in terms of their performance and responsibilities in the achievement of school and district goals.
- As designated by the principal develops and implements a school-based induction plan to meet the needs of teachers in the OCPS comprehensive new teacher induction program.
- Pursues improvement of personal professional development.
- In the absence of the principal, assumes responsibility for the total operation of the school and the welfare of the teachers, staff and students.
- Follow the district's policies and procedures as related to all HRMD guidelines, executive limitations, the district's instructional initiatives, and the school district's charter guidelines.
- Follow the district's policies and procedures as related to fixed assets.
- Develop leadership in subordinates.
- Responsible for keeping up to date on current technology being used by OCPS. With the support of the district, attends training to ensure skill level in various technologies is at the level required to perform in current position.
- Responsible for maintaining timely and accurate information and accountable for the quality of information maintained by those they supervise.
- Responsible for self-development and keeping up to date on current research, trends and best practices relevant to the area of responsibility.
- Perform other duties and responsibilities as assigned by supervisor.

#### **KNOWLEDGE SKILLS AND ABILITIES:**

- Ability to demonstrate the knowledge and practice of current educational trends, research and technology;
- Understand the unique needs, growth problems and characteristics of school students.
- Read, interpret and implement the State Board Rules, Code of Ethics, School Board Policies and appropriate state and federal statutes; and coach, supervise and evaluate personnel in accordance with collective bargaining agreements.
- The Assistant School Principal will need to demonstrate effective communication and interaction skills with all stake holders, have the ability to use group dynamics within the context of cultural diversity and be knowledgeable of Florida educational reform, accountability and effective school concepts.
- Bilingual skills preferred.
- Computer skills as required for the position.

|                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| POSITION TITLE:                  | Teacher                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| CONTRACT YEAR:                   | Ten Months                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| PAY GRADE:                       | Teacher Salary Schedule                                                                                                                                                                                                                                                                                                                                                                                                                      |
| QUALIFICATIONS:                  | Appropriate State of Florida certification<br><br><u>Special Qualifications</u> - Bilingual skills preferred.<br>Computer skills as required for the position.                                                                                                                                                                                                                                                                               |
| DIRECT<br>ACCOUNTABILITY:        | School Principal                                                                                                                                                                                                                                                                                                                                                                                                                             |
| GOAL:                            | To create and maintain a classroom atmosphere that generates high expectations and enthusiasm for learning by infusing critical thinking skills, application skills, interpersonal skills, and technology into an aligned curriculum and assessment process, resulting in measurable student achievement gains for all students in order to meet district and state standards.                                                               |
| ACCOUNTABILITY<br>PROCEDURES:    | The Principal will assess the effectiveness of the Teacher with respect to the performance of specific responsibilities by means of the Instructional Personnel Assessment System (IPAS).                                                                                                                                                                                                                                                    |
| PERFORMANCE<br>RESPONSIBILITIES: | The Teacher shall: <ol style="list-style-type: none"> <li><b>ASSESSMENT</b><br/><br/>use assessment strategies (traditional and alternative) which are aligned with the curriculum and standards to assist in the continuous development of the learner.</li> <li><b>COMMUNICATION</b><br/><br/>use effective communication techniques with students, parents, and all other stakeholders.</li> <li><b>CONTINUOUS IMPROVEMENT</b></li> </ol> |

engage in planned continuous professional quality improvement for self and school.

**4. CRITICAL THINKING**

use appropriate techniques and strategies which promote and enhance critical, creative, and evaluate thinking capabilities of students.

**5. DIVERSITY**

use appropriate instructional strategies and materials that reflect each student's culture, learning styles, special needs, and socio-economic background.

**6. ETHICS AND REGULATIONS**

fulfill the terms of any affected written contract and adhere to Code of Ethics and Principles of Professional Conduct of the Education Profession in Florida and assist in the enforcement of all federal, state and district board regulations.

**7. HUMAN DEVELOPMENT AND LEARNING**

use an understanding of learning and human development to provide a positive learning environment which supports the intellectual, personal, and social development of all students.

**8. KNOWLEDGE SUBJECT MATTER**

demonstrate knowledge and understanding of the subject matter.

**9. LEARNING ENVIRONMENTS**

establish a classroom management system that maintains appropriate discipline and creates a positive learning environment in which students are actively engaged in learning, social interaction, cooperative learning, and self-motivation.

**10. PLANNING**

plan, align, implement, and evaluate effective instruction and assessment in a variety of learning environments.

**11. ROLE OF THE TEACHER**

work with peers, parents, community, and other stakeholders in the continuous improvement of the educational experiences of students.

**12. TECHNOLOGY**

integrate appropriate technology in teaching and learning processes.

**13. ESOL REQUIREMENT**

complete the training and obtain the endorsement outlined in State Board of Education rules and/or guidelines if assigned limited English proficient (LEP) students.

**14. RECORD KEEPING**

keep school records and prepare and submit such reports as may be required by law, by regulations of the state board or school district.

**15. PROPERTY**

account for all other school property (keys, records, reports, personal computers, etc.) to the principal of the school or to the Superintendent as may be prescribed by regulations of the state board and of The School Board of Broward County.

**16. ADDITIONAL RESPONSIBILITIES**

- a. perform and promote all activities in compliance with equal employment and nondiscrimination policies.
- b. ensure adherence to good safety procedures.
- c. follow federal and state laws, as well as School Board policies.
- d. perform other duties as assigned by the principal.

Board Approved: 10/7/97 &  
Adopted: 11/4/97  
Revised: 10/05/04

## Job Descriptions

**POSITION TITLE:** Exceptional Student Education (ESE) Program Specialist  
**CONTRACT YEAR:** Ten Months

### QUALIFICATIONS

**EDUCATION:** An earned bachelor's degree or higher from an accredited institution; Florida certification in at least one area of exceptionality.

### EXPERIENCE

**REQUIRED:** Minimum of three (3) years of successful teaching experience. Bilingual skills preferred. Computer skills are required for the position.

**REPORTS TO:** School Principal

**SUPERVISES:** None

**POSITION GOAL:** To provide on-site procedural and curricular assistance to all school-based personnel with regard to the education of exceptional students.

### ESSENTIAL PERFORMANCE RESPONSIBILITIES:

**The ESE Specialist shall:**

- Upon request, serve as the principal's designee for ESE staffings.
- coordinate exceptional student education staffings, re-evaluations and parent conferences for exceptional students.
- Provide on-site inservice training to school-based personnel on a regular basis.
- at the elementary level, participate in early intervention screenings and staffings.
- Assist regular teachers of mainstreamed exceptional students to provide appropriate educational experiences for these students.
- Coordinate and/or conduct interventions, educational evaluations and observations of exceptional students.
- Assist staffing committees in developing appropriate IEPs.
- Conduct workshops for parents.

- Prepare ESE folders for approval by the Area Coordinator.
- Assist teachers in implementing effective classroom management strategies.
- Provide feedback to the ESE Curriculum Supervisors with regard to curricula, related services and program delivery systems.
- Participate in in service training programs designed to improve the ability to provide procedural and curricular assistance.
- Review current developments, literature and technical sources of information related to job responsibility.
- Ensure adherence to good safety procedures.
- Perform other duties as assigned by the school principal.
- Follow federal and state laws, as well as School Board policies.

## Job Descriptions

**POSITION TITLE:** School Psychologist  
**CONTRACT YEAR:** Ten - Twelve Months

### QUALIFICATIONS

**EDUCATION:** A master's degree from an accredited university.  
State certification as a School Psychologist.

### EXPERIENCE

**REQUIRED:** Supervised internship approved by an accredited school psychology training program or satisfactory experience as a school psychologist.  
Computer skills as required for the position.  
Bilingual skills preferred.

**REPORTS TO:** School Principal

**SUPERVISES:** None

**POSITION GOAL:** To provide quality school psychological services to students, parents and school personnel through prevention, evaluation, intervention, consultation, and training services.

### ESSENTIAL PERFORMANCE RESPONSIBILITIES:

**The Guidance Counselor shall:**

- evaluate students who have been referred for formal individual psychological evaluations.
- diagnose students based upon information from parents, school and community professionals, evaluation instruments and techniques.
- interpret the results of formal individual psychological evaluations to parents and school personnel.
- prepare written psychological reports of findings, interpretations, diagnoses and recommendations regarding students evaluated.
- conduct reevaluations and participate in reviews of students enrolled in exceptional student programs.



- serve as a member of eligibility and placement staffing committees and school-based student support teams.
- maintain familiarity with current criteria for the identification and placement of students in exceptional student programs and follow procedures specified in Special Programs and Procedures for Exceptional Students for all students suspected of being exceptional.
- maintain familiarity with current evaluation instruments and techniques, their statistical properties, and appropriate interpretation.
- consult with parents, students and school personnel to assist in resolving the learning and adjustment problems of students.
- perform crisis intervention services as part of the Crisis Support Team Program.
- follow procedures established by the Area Coordinator, Student Services and Director, Psychological Services.
- inform the Area Coordinator, Student Services of concerns regarding delivery of psychological services.
- inform the Area Coordinator, Student Services of concerns regarding work stations, secretarial services, equipment, or supplies.
- respond to principal requests for other services in which the expertise of a psychologist would be of value, such as short-term individual and group counseling activities.
- provide teacher and parent training, in coordination with Human Resource Development, on topics such as parent/teacher conferencing and behavior management.
- assist parents in accessing appropriate community agency services.
- participate in departmental planning and program development activities.
- participate in on-going professional development activities under the direction of the Director or Area Coordinator, Student Services.
- provide support and assistance to interns and other school psychologists.
- abide by the "Code of Ethics of the Education Profession in Florida," the National Association of School Psychologists' "Principles for Professional Ethics" and the Florida Association of School Psychologists' "Ethical Principles for Professional Practice."
- perform and promote all activities in compliance with equal employment and nondiscrimination policies of The School Board of Broward County.
- participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment.
- review current developments, literature and technical sources of information related to job responsibility.
- ensure adherence to good safety procedures.
- perform other duties as assigned by the Area Coordinator, Student Services or Director, Psychological Services.
- follow federal and state laws, as well as School Board policies.

## Job Descriptions

**POSITION TITLE:** Literacy Coach  
**CONTRACT YEAR:** Ten Months

### QUALIFICATIONS

**EDUCATION:** Bachelor's degree from an accredited educational institution and advanced coursework or professional development in reading is required.

### EXPERIENCE

**REQUIRED:** Must be endorsed or K-12 certified in the area of reading, or working toward that status by completing a minimum of two (2) reading endorsement competencies of sixty (60) in-service hours each or six (6) semester hours of college coursework in reading per year.

**REPORTS TO:** Principal

**SUPERVISES:** None

**POSITION GOAL:** The literacy coach will serve as a stable resource for professional development throughout a school to generate improvement in reading and literacy instruction and student achievement. Coaches will support and provide initial and ongoing professional development to teachers.

### ESSENTIAL PERFORMANCE RESPONSIBILITIES:

**The Literacy Coach shall:**

- Each of the major reading components, as needed, based on an analysis of student performance data.
- Administration and analysis of instructional assessments.
- Providing differentiated instruction and intensive intervention.
- Model effective instructional strategies for teachers; Facilitate study groups; Train teachers in data analysis and using data to differentiate instruction.
- Coach and mentor colleagues and provide daily support to classroom teachers.

- Work with teachers to ensure that research-based reading programs (comprehensive core reading programs, supplemental reading programs and comprehensive intervention reading programs) are implemented with fidelity.
- Help to increase instructional density to meet the needs of all students;
- Help lead and support reading leadership teams at their school(s);
- Continue to increase their knowledge base in best practices in reading instruction, intervention, and instructional reading strategies;
- Work with all teachers (including ESE, content area, and elective areas) in the school they serve, prioritizing their time to those teachers, activities, and roles that will have the greatest impact on student achievement, namely coaching and mentoring in classrooms;
- Work frequently with students in whole and small group instruction in the context of modeling and coaching in other teachers' classrooms;
- Not be asked to perform administrative functions that will confuse their role for teachers; and spend limited time administering or coordinating assessments.
- While the reading coach must not be assigned a regular classroom teaching assignment, they are expected to work frequently with students in whole and small group instruction in the context of modeling and coaching in other teachers' classrooms.



*Somerset Academy, Inc. submit to  
Broward County Public Schools:*

***APPENDIX G  
LENDER  
COMMITMENT  
LETTER***

**For:  
SOMERSET PARKS  
ACADEMY  
CHARTER SCHOOL**



QUALITY/RESULTS/GROWTH FOR PUBLIC CHARTER SCHOOLS

July 1, 2015

**RE: *Somerset Parks Academy Charter School***

To whom it may concern:

Building Hope is a non-profit foundation based in Washington, DC that works to close the educational achievement gap by giving students access to high quality public charter schools in cities across the country. We support the expansion of academically successful schools with the capacity to grow their enrollments in order to catalyze change across their local public education systems by providing technical and financial assistance related to capital projects. Our services may also include grants to pay for professional fees associated with a project (i.e., architect, engineering), or other project-specific needs and sponsoring school fundraising events to support the academic program.

Building Hope is committed to supporting **Somerset Academy, Inc.** in securing a long-range plan for the opening of the above-referenced charter school. In order to ensure that the charter school is able to secure working capital for opening, Building Hope can offer a number of different services including facility and working capital financing. Building Hope may provide such financial assistance to the charter school by:

- Lending funds to for facilities acquisitions and/or improvements at below-market rates.
- Guaranteeing, insuring, and reinsuring debt used to assist charter schools to acquire, renovate, or construct school facilities.
- Guaranteeing or insuring leases of personal or real property that are needed to begin or continue the operation of the charter schools.
- Facilitating financing by potential lenders.
- Facilitating the issuance of bonds by charter schools or other public entities for the benefit of charter schools.
- Credit Enhancement Program

In addition, if the charter school is unable to secure a start-up grant, Building Hope can secure a line of credit for the school to help with the startup costs. Building Hope provides loan guarantees to make facilities financing more affordable for public charter schools throughout the United States. Guarantees range in size from \$250,000 to \$1 million. They have a five-year term with a 1% commitment fee and a 1% annual guaranty fee.

Sincerely,

S. Joseph Bruno  
President