

# Palm Harbor Montessori

## Florida Charter School Application Evaluation Instrument

Each section presents criteria for a response that meets the standard, and these criteria should guide the overall rating for the section. The Strengths and Weaknesses boxes provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, especially if some of the data or evidence does not fit neatly into the criteria provided.

The following definitions should guide the ratings:

- Meets the Standard:** The response reflects a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.
- Partially Meets the Standard:** The response addresses most of the criteria, but the responses lack meaningful detail and require important additional information.
- Does Not Meet the Standard:** The response lacks meaningful detail, demonstrates lack of preparation, or otherwise raises substantial concerns about the applicant's understanding of the issue in concept and/or ability to meet the requirement in practice

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**OVERALL ASSESSMENT – COMPLETE THIS SECTION LAST**

Would you recommend approval of this application for a public charter school? Explain your recommendation in the Summary Comments section, below.

DENY	APPROVE
<input checked="checked" type="checkbox"/>	<input type="checkbox"/>

Name of Person Completing Assessment: Dot Clark     Date: 10/22/13

Title: Director of Charter Schools and Home Education

Signature: \_\_\_\_\_

**Summary:** Of the nineteen sections in the Evaluation Instrument the applicant scored:

- “Meets Expectations”- 1
- “Partially Meets”- 4
- “Does Not Meet”- 3

In the Organizational Plan the applicant scored:

- “Meets Expectations”- 0
- “Partially Meets”- 4
- “Does Not Meet” – 0
- Not Applicable - 1

In the Business Plan the applicant scored:

- “Meets Expectations”- 4
- “Partially Meets”- 0
- “Does Not Meet” - 2

## **I. Educational Plan**

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

### **1. Mission, Guiding Principles and Purpose**

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

#### **Statutory References:**

s. 1002.33(2) (a); s. 1002.33(2) (b); s. 1002.33(2) (c); s. 1002.33(6) (a) (1); s. 1002.33(7) (a) (1)

#### **Evaluation Criteria:**

A response that meets the standard will present:

- A compelling mission statement that defines the purpose and values of the school.
- A set of priorities that are meaningful, manageable and measurable, and focused on improving student outcomes.

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

➤ The Mission of Palm Harbor Montessori Charter School is to provide students in grades one through eight a child-centered, community-oriented public school based in the scientific teachings of Dr. Maria Montessori. The school is committed to providing an environment where love of learning is celebrated, educational programs are individualized and creativity abounds.	Page 1
<b>Concerns and Additional Questions</b>	<b>Reference</b>
➤ The applicant states that the Montessori curriculum is aligned to the NGSSS & CCSS, however, there is a question as to elements of the Montessori model concerning specific grade level expectations for “manageable and measureable” student outcomes.	Pages 1-7

### **2. Target Population and Student Body**

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

#### **Statutory Reference(s):**

s. 1002.33(10) (e); s. 1002.33(6) (b) (2); s. 1002.33(7) (a) (1); s. 1003.03

**Evaluation Criteria:**

A response that meets the standard will present:

- An understanding of the students the charter school intends to serve.
- If the applicant proposes to target certain populations, the projected student body should align with the overall mission of the school.

Meets the Standard		Partially Meets the Standard		Does Not Meet the Standard																															
<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>																															
Strengths				Reference																															
➤ The school agrees to comply with Florida’s class size requirements.				Page 11																															
<div>Projected enrollment identified:</div> <table><thead><tr><th>School Year</th><th>School Grades</th><th>Number of Students per Grade</th><th>Number of Students per Class</th><th>Maximum Enrollment</th></tr></thead><tbody><tr><td>1st Year</td><td>1-8</td><td>Gr. 1-3 – 18 per grade Gr. 4-8 - 22 per grade</td><td>90 – 5 classes 154-7 classes</td><td>244</td></tr><tr><td>2nd Year</td><td>1-8</td><td>Gr. 1-3– 18 per grade Gr. 4-8- 22 per grade</td><td>144- 8 classes 220-10 classes</td><td>364</td></tr><tr><td>3rd Year</td><td>1-8</td><td>Gr. 1-3– 18 per grade Gr. 4-8- 22 per grade</td><td>144-8 classes 242-10 classes</td><td>386</td></tr><tr><td>4th Year</td><td>1-8</td><td>Gr. 1-3– 18 per grade Gr. 4-8- 22 per grade</td><td>144- 8 classes 242-10 classes</td><td>386</td></tr><tr><td>5th Year</td><td>1-8</td><td>Gr. 1-3– 18 per grade Gr. 4-8- 22 per grade</td><td>144- 8 classes 242-10 classes</td><td>386</td></tr></tbody></table>				School Year	School Grades	Number of Students per Grade	Number of Students per Class	Maximum Enrollment	1st Year	1-8	Gr. 1-3 – 18 per grade Gr. 4-8 - 22 per grade	90 – 5 classes 154-7 classes	244	2nd Year	1-8	Gr. 1-3– 18 per grade Gr. 4-8- 22 per grade	144- 8 classes 220-10 classes	364	3rd Year	1-8	Gr. 1-3– 18 per grade Gr. 4-8- 22 per grade	144-8 classes 242-10 classes	386	4th Year	1-8	Gr. 1-3– 18 per grade Gr. 4-8- 22 per grade	144- 8 classes 242-10 classes	386	5th Year	1-8	Gr. 1-3– 18 per grade Gr. 4-8- 22 per grade	144- 8 classes 242-10 classes	386	Page 11	
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Concerns and Additional Questions				Reference																															
➤ Enrollment projections seem aggressively high with the decline of student enrollment in Pinellas County.				Page 11																															

**3. Educational Program Design**

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

**Statutory Reference(s):**

s. 1002.33(7) (a) (2)

Form Number: IEPC-M2

Rule Number: 6A-6.0786

May 2012

**Evaluation Criteria:**

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

- Is clear and coherent;
- Is based on effective, research-based educational practices, teaching methods and high standards for student learning;
- Aligns with the school's mission and responds to the needs of the school's target population; and
- Presents evidence that the proposed approach will lead to improved student performance for the school's target population.

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

<ul style="list-style-type: none"> <li>➤ The applicant will follow the same calendar as Pinellas County Schools and will exceed the required instructional hours.</li> <li>➤ Montessori trained teachers will be required to become highly qualified and hold Florida State certification.</li> </ul>	<p>Page 12</p> <p>Page 19 &amp; 20</p>
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Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>➤ “The Montessori classroom requires a large space because Montessori is materials-intensive and allows for movement.” The school will need to ensure that the facility is large enough to meet these needs and is included in the budget projections.</li> <li>➤ The school combines students in multi-age classrooms (grades 1-3, 4-6, and 7-8). It cannot be determined how classroom teachers will meet individual students’ needs and specific grade level requirements of the Common Core State Standards in the combined multi-age classroom. The importance of the 3<sup>rd</sup> grade reading requirements is also a concern, especially with the combination of grades 1-3.</li> <li>➤ The applicant does not clearly explain how the specific needs of ESE students who require accommodations and modifications will be met in the multi-age classroom (see Section 6).</li> </ul>	<p>Page 16</p> <p>Pages 15- 17</p> <p>Page 15</p>

#### 4. Curriculum Plan

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

#### Statutory Reference(s):

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

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

- Provides a clear and coherent framework for teaching and learning;
- Is research-based;
- Is consistent with the school's mission, educational philosophy and instructional approach;
- Will enable students to attain Next Generation Sunshine State-Common Core State Standards and receive a year's worth of learning for each year enrolled; and
- Will be appropriate for all students at all levels.

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

Strengths	Reference
➤ The applicant describes how the educational program aligns with the school's mission and educational philosophy.	

Concerns and Additional Questions	Reference
➤ The applicant states that students work through three year cycles and "multi-age classrooms", but does not explain how teachers will address the targeted standards for each specific grade in the multi-age classroom (grades 1-3, 4-6, 7-8). It cannot be determined that students will be able to attain Next Generation State Standards-Common Core State Standards and receive a year's worth of learning for each year enrolled.	Page 15
➤ The applicant states that "The Internship/Placement Program is an integral part of the middle school experience" but does not clearly describe how the school will implement these programs. The following are areas of concern: Screening of businesses for JLA clearance, alignment to the curriculum, safety and liability associated with off-campus jobs for minors, transportation of students.	Page 42
➤ There is a lack of detail about the "week long field trip[s]", how these field trips are aligned the NGSSS & CCSS, and how students will make up lost instructional time (level 1 & 2 students who require a 90 minute block of uninterrupted reading instruction).	Page 38
➤ The applicant does not clearly describe the instructional plan for the students reading below level 3 and the "Intensive Reading Group[s]".	Page 46
➤ The applicant describes the 90 minute block for level 1 and	Pages 47 & 48

2 students but does not provide a description of the 90 minute block for level 3-5 students and grades 1 and 2 students who do not have FCAT levels.	
➤ The applicant states that FCAT, FAIR, and CELLA results will provide data to target support in areas a student may struggle and will be “integrated seamlessly into the function of the Montessori classroom.” There are no details on how data from these assessments will drive instruction and be integrated seamlessly into the classroom.	Page 28
➤ The applicant provides dated research of Montessori programs with three citations as recent as 2009, the remaining supporting research is dated from 1967-2007. Since 2009 there have been significant changes in education, especially in meeting specific grade level standards and assessment. Based on the information in this application, it is not clear how the Montessori model has adapted to these new requirements.	Pages 23-26

### **5. Student Performance, Assessment and Evaluation**

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

#### **Statutory Reference(s):**

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

#### **Evaluation Criteria:**

A response that meets the standard will present:

- Measurable educational goals and objectives that set high standards for student performance.
- Promotion standards that are based on high expectations and provide clear criteria for promotion from one level to the next, and for graduation (if applicable).
- Evidence that a range of valid and reliable assessments will be used to measure student performance.
- Assessment activities that are sufficiently frequent and a detailed plan to determine whether students are making adequate progress.
- Evidence that data will inform decisions about adjustments to the educational program.
- Plans for sharing student performance information that will keep students and parents well informed of academic progress.

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

Strengths	Reference
➤ Goals for reading, mathematics, and writing are appropriate.	Pages 55 & 56
➤ Student Performance Monitoring is aligned with the school district's assessment processes.	Pages 58 & 59
➤ Use of alternate progress monitoring methods based in Montessori principles.	Pages 60 & 61
➤ Plan for sharing student performance information with parents is acceptable.	Pages 60 & 61

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>Some of the goals and objectives are not measurable and set high standards for student performance. <ul style="list-style-type: none"> <li>➤ Goal 4 for science lacks detail.</li> <li>➤ Although the FAIR assessment is noted in the chart on page 59, the frequency is not addressed nor are there details on how FAIR data will be used to drive instruction.</li> <li>➤ There is a lack of specificity about "when a child might truly benefit from another year in a given classroom, because some students remain and some move on from each class every year". Is this considered retention? What is the specific process?</li> </ul> </li> <li>Does not provide evidence that data will inform decisions about adjustments to the educational program. <ul style="list-style-type: none"> <li>➤ There is a lack of specificity concerning how data will inform educational decisions and drive instruction.</li> </ul> </li> </ul>	<p>Page 56</p> <p>Page 59</p> <p>Page 57</p> <p>Page 60</p>

## 6. Exceptional Students

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

### Statutory Reference(s):

s. 1002.33(16) (a) (3)

### Evaluation Criteria:

A response that meets the standard will present:

- Clear description of the levels of service the school will provide to students with disabilities.

- A clear description of how the school will ensure that students with disabilities (SWD) will have an equal opportunity of being selected for enrollment.
- An understanding and commitment to collaborating with the sponsor to ensure that placement decisions for students with disabilities will be made based on each student's unique needs.
- An appropriate plan for evaluating the school's effectiveness in serving exceptional students, including gifted.
- A realistic enrollment projection (SWD) and a staffing plan that aligns with the projection.

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

➤ Demonstrates understanding of MTSS (RtI) for contracting student services.	Page 62-67
➤ Demonstrates an understanding of services for Gifted students.	Page 68

Concerns and Additional Questions	Reference
<p>➤ The applicant indicates that the school will serve “students whose needs can be met in a separate classroom (less than 40% of instruction occurring in a class with non-disabled peers)”. The following statements contradict this requirement:</p> <ul style="list-style-type: none"> <li>○ “PHMCS will be unable to accommodate students who require self-contained classrooms (pg. 62).</li> <li>○ “Palm Harbor Montessori Charter Schools expects that exceptional students who require a low level of support would easily be accommodated within the model” (pg. 62).</li> <li>○ “Students with special needs will only be referred to other schools within the district if the nature of the disability precludes education in a Montessori classroom” (pg. 62).</li> <li>○ “In the event that the disability does not preclude complete participation in the PHMCS classroom...” (pg. 62).</li> </ul> <p>➤ These statements conflict with item B of this Section: <i>Describe how the school will ensure that students with disabilities will have an equal opportunity of being selected for enrollment in the charter school.</i></p> <p>➤ The school cannot pick and choose, or “preclude” a student from “complete participation” because of a disability, they are required to provide FAPE.</p> <p>➤ The applicant states that “PHMCS will contract with the school district for those support services.” This assumes that the school district will have the capacity to provide support services. It is suggested that the school also</p>	<p>Page 62</p> <p>Page 62</p> <p>Page 62</p> <p>Page 62</p> <p>Page 62</p> <p>Page 64</p> <p>Page 62</p>

<p>consider contracting with outside service providers</p> <ul style="list-style-type: none"> <li>➤ 1-9 on pages 63 &amp; 64 are the same 1-9 on pages 64 &amp; 65.</li> <li>➤ Although the applicant lists five (5) instructional modifications which include Co-teaching, Support facilitation, Direct instruction, Consultations, and Resource classrooms, it is not clear how the multi-age classroom can meet the needs of a variety accommodations and modifications that students' IEPs may require. The applicant fails to explain how, given the proposed staffing model, the school will serve students whose IEP requires resource services, and a student at the same grade level who may require more individualized, direct instruction.</li> <li>➤ The school plans to hire its initial 1 or 2 ESE staff as "enrollments require or as dictated by IEP's." And that "Additional ESE teachers or appropriate staff will be added as enrollment or IEP's warrant." Given the issues identified in this Section, there is significant concern that the need for additional ESE staff is based on incorrect assumptions of the school requirements to serve all students under FAPE.</li> <li>➤ The applicant frequently refers to "modifications and accommodations". Based on numerous statements in the application, it seems that the school only intends to serve students whose disability would "require a low level of support"; therefore, it cannot be determined if the school will provide higher levels of support and/or modifications as may be required by a student's IEP.</li> <li>➤ The school projects 10% SWD population, and states that the district's SWD population is 18%. The district SWD population is 12%. There is no plan that addresses the strong possibility that the school's SWD population may be larger than the projected 10%.</li> <li>➤ The Application contains a statement on page 88 that additional ESE teachers will be hired if needed, however, the five year budget reflects that only one ESE teacher is budgeted. Given that there is question as to the sufficiency of the budget as presented, it does not appear that there will be additional funds available to procure an additional ESE teacher if needed.</li> <li>➤ There are also statements in the application that indicate a lack of basic understanding of statutes and regulations regarding exceptional student education. For instance: "The IEP team will consist of the student, the parents, teacher, a special education teacher and potentially a district representative and anyone else required by the family, school or district." This statement does not demonstrate an understanding of the required members of an IEP team pursuant to Rule 6A-6.03028.</li> </ul>	<p>Page 66</p> <p>Page 67</p> <p>Pages 62-68</p> <p>Page 67</p> <p>Page 88</p>
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➤ “IEP team members will meet to determine if an IEP is necessary or if the matter might be resolved through a 504 plan. If the IEP is not necessary, the 504 plan committee will reconvene to determine appropriate intervention strategies. If an IEP is found to be necessary through testing and evaluation, then the team will decide what type of evaluation is best suited for the student.” This statement seems to reflect confusion between the purposes of 504 plans and IEPs and appears to imply that they are almost interchangeable.	
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## 7. English Language Learners

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

### Statutory Reference(s):

s. 1002.33(10)

### Evaluation Criteria:

A response that meets the standard will present:

- Demonstrated understanding of state and federal requirements regarding the education of English language learner students.
- Sound plans for educating English language learner students that reflect the full range of programs and services required to provide all students with a high quality education.
- Demonstrated capacity to meet the school’s obligations under state and federal law regarding the education of English language learner students.

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

Strengths	Reference
➤ Annual English Language Proficiency Assessment for English Language Learners (ELL) meets the standards.	Page 70
➤ The school has an ELL Committee to carry out the process of serving ELL students.	Page 69

Concerns and Additional Questions	Reference
➤ Pinellas uses the CELLA online to assess English language proficiency. The requirement for testing of reading and writing skills in grades 3-8 was not addressed.	Page 72
➤ The state’s requirement for extension of services beyond three years in ESOL were not addressed.	Pages 69-73
	Page 72

<ul style="list-style-type: none"> <li>➤ Requirements for Exiting ELLs from the ESOL Program are not in compliance with <b>6A-6.0903</b>.</li> <li>➤ Monitoring requirements are not specific and required cycles of monitoring.</li> </ul>	
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## 8. School Climate and Discipline

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

### Statutory Reference(s):

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

### Evaluation Criteria:

A response that meets the standard will present:

- A sound approach to classroom management and student discipline.
- Legally sound policies for student discipline, suspension, and dismissal.

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

Strengths	Reference
<ul style="list-style-type: none"> <li>➤ PHMS will use the school district's Code of Conduct for discipline matters.</li> </ul>	Pages 74-76

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>• The application lacks information that provides a clear understanding of policies for student discipline in the classroom.</li> <li>➤ The applicant provides a vague description of a behavior plan that includes "peer problem-solving when possible". Additionally, "students who are out of control with stay with a teacher or sit alone until they can control themselves". It is not stated if this is part of a school-wide behavior plan. A more detailed behavior plan that addresses a wide variety of behaviors would be helpful for the reviewer, especially given the concern that the Montessori model may not meet the needs of all students.</li> <li>➤ The applicant states "Teachers will work with the children to establish routines and procedures to promote security and ownership." The applicant does not explain what "routines and procedures" will promote safety and ownership.</li> <li>➤ The school's Suspension Policy 8.1.1 does not define offenses that would result in suspension and differs from the district's suspension procedures in the district's Code of Conduct (pg. 74 of the application states that "PHMCS will</li> </ul>	<p>Pages 74-76</p> <p>Page 74</p> <p>Page 75</p>

<p>use the district's Code of Conduct").</p> <ul style="list-style-type: none"> <li>➤ The applicant does not address staff development or how teachers will be trained to deal with discipline issues.</li> <li>➤ The applicant does not explain what is meant by "reassignment" on page 8 of the Student Handbook.</li> <li>➤ "In the event that dismissal is necessary at PHMCS, the decision will be made by the Principal in conference with the teacher and the parents. Before reaching this point, many interventions would be implemented to help the student and the family. These measures may include: Student/teacher conferences Parent/teacher conferences Out of school suspension Probationary status letter The reasons for dismissal would be as follows: Attendance dismissal- In the event that a student incurs more than 15 unexcused absences, a student may be dismissed. Dismissal for this reason will depend upon the reasons for absence and whether or not they can be categorized as excused. To be excused, proper documentation must be provided in a timely manner." "Academic dismissal- If a student is academically unsuccessful at PHMCS, intervention strategies like parent/teacher conferences, tutoring, and academic improvement plans as well academic probation will be implemented. Dismissal will only occur if all strategies are exhausted." <p>This does not reflect an understanding that students may not be dismissed for reasons that are inconsistent with the Pinellas County Code of Student Conduct. Students may not be dismissed because of a lack of attendance or for failure to achieve academically.</p> </li></ul>	<p>Pages 74-76</p> <p>Page 8, Student Handbook</p>
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## II. Organizational Plan

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

### 9. Governance

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

#### Statutory Reference(s):

s. 1002.33(7) (a) (15); s. 1002.33(9)

#### Evaluation Criteria:

A response that meets the standard will present:

- Documentation of proper legal structure of the governing board, or a plan to organize in conformity with the laws of Florida.
- A clear understanding and description of the governing board's responsibilities.
- Evidence that the proposed governing board will contribute to the wide range of knowledge and skill needed to oversee a charter school.
- A clear, sensible delineation of roles and responsibilities in relation to governance and school management.
- A sensible method for resolving disputes between parents and the school.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>Although the application itself indicates that the governing board intends to comply with Florida Statutes, the governing documents of the governing board have several areas that are not in compliance with statutes.</p> <p>Article VII of the Articles of Incorporation is not in compliance with Section 286.011, Florida Statutes. This Article indicates that meetings may be held by electronic means of communication. Any meeting of the governing board must be held in public, with proper notification. If a member of the Board needs to appear by electronic means, there are particular statutes that address that requirement, but there must be a quorum present at the public meeting.</p>	77-84, Appendix F

Article IX of the Articles of Incorporation is not in compliance with Section 1002.33 (8) (e), Florida Statutes. The Article indicates that the property of the corporation may be distributed to other nonprofits upon dissolution of the corporation. However, all property purchased with public funds is to be returned to the School District and cannot be distributed.

Article V of the Bylaws seems to imply that the Executive Committee of the Board has the power to manage assets. Actions of the Board are required to be taken at a publicly noticed meeting of the entire Board. A committee may not make Board decisions outside of the sunshine.

Article XVI of the Bylaws is also not in compliance with Section 1002.33(8) (e) Florida Statutes with regard to dissolution as it contains the same provisions found in Article IX of the Articles of Incorporation.

Language regarding Full Disclosure of Board Members on page 79 of the application and the Conflict of Interest Form attached as Exhibit F are not in compliance with Florida law. Section 1002.33 (26) (c), Florida Statutes, indicates that an employee of the charter school, or his or her spouse, may not be a member of the governing board of the charter school. The provisions of Section 112.313, Florida Statutes prevent the use of public funds for the purchase or lease of property, goods or services from any director, officer or employee of the school or the spouse, parent, child stepchild or sibling of any director, officer or employee, or from any business in which any officer or employee has an interest nor shall the charter school use any property, good or services purchased or leased with public funds for the private benefit of any person or entity, unless an exemption listed in Section 112.313(12) applies. The conflict of interest form provides a place for board members to acknowledge these things but not indicate it is prohibited.

## 10. Management

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

### Statutory Reference(s):

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

### Evaluation Criteria:

A response that meets the standard will present:

- A management structure that includes clear delineation of the roles and responsibilities for administering the day-to-day activities of the school.
- A sound plan for the recruitment and selection of the school leader.
- A viable and adequate staffing plan aligned with the projected student enrollment.
- A sound plan for recruiting and retaining qualified and capable staff.

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

Strengths	Reference
The application clearly describes the principal as the person responsible for day-to-day operation of the school.	Pg. 85
A description of the plan for recruitment and selection of the school principal is provided along with key competencies and a job description.	Pg. 86 and Appendix C
The application includes a description of the evaluation process.	Pg. 87
A detailed staffing plan is included.	Pg. 88 Appendix H
Staff recruiting strategies appears to be appropriate.	Appendix D

Concerns and Additional Questions	Reference
Although a recruiting strategy is presented it is unclear if the staff will be compensated enough to entice them to remain. The applicant states that the school <u>may</u> use the teacher salary schedule of PCS School as a salary guide.	Pg. 96
During a phone conference the applicant stated that the school would rely on the PCS's salary schedule in association with the budget restraints due to enrollment. This may affect the school's ability to recruit and retain the highly qualified staff that the applicant desires in a Montessori setting.	

## **11. Education Service Providers**

The term “education service provider” (ESP) refers to any number of organizations that contract with the governing board of a school to provide comprehensive services. The three major types of ESPs that serve charter schools are education management organizations, comprehensive school design providers, and virtual school management organizations. The Education Service Provider section should describe, if applicable, the contractual arrangement between the school’s governing board and such a provider.

### **Statutory Reference(s):**

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

### **Evaluation Criteria:**

A response that meets the standard will present:

- A persuasive explanation of the reasons for contracting with an education service provider.
- A persuasive explanation of how the proposed relationship with the ESP will further the school’s mission.
- A clear description of the services to be provided by the ESP.
- A clear delineation of the roles and responsibilities between the school’s governing board and the ESP.
- A clearly defined performance-based relationship between the school’s governing board and the ESP.

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

Strengths	Reference

Concerns and Additional Questions	Reference

## **12. Employment**

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

### **Statutory Reference(s):**

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

### **Evaluation Criteria:**

A response that meets the standard will present:

- A compensation plan that will attract and retain quality staff.
- Policies and procedures that hold staff to high professional standards or a sound plan for development of policies and procedures.

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

Strengths	Reference
Policies and procedures that hold staff to high professional standards is provided.	Appendix D

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>Does not provide a complete compensation plan that will attract and retain quality staff. <ul style="list-style-type: none"> <li>The applicant states that the school <u>may</u> use the teacher salary schedule of PCS School as a salary guide.</li> <li>The applicant does not verify its commitment to adhere to Senate Bill 736 requirements.</li> </ul> </li> </ul> <p>During a phone conference the applicant stated that the school would rely on the PCS's salary schedule in association with the budget restraints due to enrollment. This may affect the school's ability to recruit and retain the highly qualified staff that the applicant desires in a Montessori setting.</p> <p>In addition, the applicant referred to Appendix C: Administration Observation Template, a state document, as evidence that the school will comply to the requirements.</p>	Pg. 96-99

### **13. Student Recruitment and Enrollment**

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

#### **Statutory Reference(s):**

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

#### **Evaluation Criteria:**

A response that meets the standard will present:

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

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

Strengths	Reference
<ul style="list-style-type: none"> <li>The application includes a reasonable description of the school's marketing and recruiting plan.</li> <li>Registration periods and provisions for conducting a lottery (should applicants exceed capacity) are clearly defined.</li> </ul>	Pg. 103

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>A lottery process (should applicants exceed capacity) is mentioned but the process is not clearly defined.</li> <li>A parent agreement must be signed before student admission and how would it be enforced? A copy is not included.</li> </ul> <p>During a phone conference, the applicant indicated that it was a form for the parents to acknowledge the schools mission and purpose. A copy of the signature only page was submitted later.</p>	<p>Page 103</p> <p>Page 104</p> <p>Appendix E Page 17 Appendix E page 16</p>

### III. Business Plan

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

#### 14. Facilities

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

#### Statutory Reference(s):

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

#### Evaluation Criteria:

A response that meets the standard will present:

- A realistic plan for acquiring a facility that is appropriate and adequate for the school's program and targeted population.
- Evidence that the school has access to the necessary resources to fund the facilities plan.

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

Strengths	Reference
The school does not currently have a facility but presents a reasonable plan for acquiring one, including anticipated lease costs.	Pg. 107

Concerns and Additional Questions	Reference

### 15. Transportation

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

#### Statutory Reference(s):

s. 1002.33(20)

#### Evaluation Criteria:

A response that meets the standard will present:

- A transportation plan that will serve all eligible students.

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

Strengths	Reference
The school expects parents to provide transportation for their children and help establish a car-pooling system but stated that they will make transportation provisions for students as needed.	Pg. 109

Concerns and Additional Questions	Reference

### 16. Food Service

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

#### Statutory Reference(s):

s. 1002.33(20) (a) (1)

#### Evaluation Criteria:

A response that meets the standard will present:

- A food service plan that will serve all students.

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

Strengths	Reference
The applicant will provide its own food services program through a qualified private vendor.	Pg. 110

Concerns and Additional Questions	Reference

### 17. Budget

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

#### **Statutory Reference(s):**

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

#### **Evaluation Criteria:**

A response that meets the standard will present:

- Budgetary projections which are consistent with all parts of the application, including the school's mission, educational program, staffing plan and facility.
- A realistic assessment of the projected sources of revenue and expenses that ensure the financial viability of the school.
- A sound plan to monitor the budget and make adjustments as necessary.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<p>Start-up budget and five year budget includes an aggressive fundraising budget of \$20,000 during the planning year and a cumulative total of \$105,000 over the five year period. These dollars have not been raised and could be difficult to achieve. Operating (FEFP) budget should be kept separate from other funding sources.</p> <p>Five year revenue is inflated a cumulative total of \$214,104. State FTE funds include the ESE Guarantee allocation (See submitted revenue estimate worksheet).</p> <p>Year four and five expenses appear to be assuming school is ranked as high performing therefore district fees would be assessed at 2%. This assumption could under estimate expenses approximately \$46,000 each of the two years or a cumulative total of \$92,000.</p> <p>Revenue collections from providing food service appear to be inflated. Expenses are reflected considerably lower than revenue. This program may prove to be less of a revenue generating program</p>	

<p>than budget plan is assuming.</p> <p>Five year budget does not anticipate leasing or purchasing an adequate number of computers. According to the provided budget notes only the lease of 20 computers has been planned. With twelve teachers and 244 students anticipated 20 computers is inadequate to furnish the school. State requires one computer for every 5 students; therefore for the student population only there should be a minimum of 49 computers.</p> <p>Application states on page 112 that they estimate to lease furniture, fixtures, curriculum, textbooks, computers and equipment at an estimated annual lease cost of \$60,000. Five year budget does not appear to reflect those expenses accurately.</p> <p>Application states on page 113 that they estimate the back-office services to cost \$1,250 per month. Five year budget reflects a payroll expense for year one of \$8,000. Expenses are understated.</p> <p>Five year budget has no allocation for the purchase of any software.</p> <p>In summary, the application fails to present a realistic assessment of the projected sources of revenue and expenses.</p>	
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### **18. Financial Management and Oversight**

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

#### **Statutory Reference(s):**

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

#### **Evaluation Criteria:**

A response that meets the standard will present:

- A clear description of how the school's finances will be managed. The description must include assurances that the governing board retains ultimate control over the school's finances.
- A clear description of strong internal controls. The system of internal controls must be sufficient to safeguard finances.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>A clear description of strong internal controls not provided relating to cash disbursements, cash handling, segregation of duties, and bank reconciliation. The application needs more comprehensive details relating to internal controls.</li> </ul>	

### 19. Action Plan

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

#### Statutory Reference(s):

s. 1002.33(7) (a) (16)

#### Evaluation Criteria:

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

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

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

Strengths	Reference
An action plan for school opening is provided in the application.	Page 116

Concerns and Additional Questions	Reference