Ina A. Colen Academy

Submitted to Marion County Public Schools

February 2020

To Open August 2022

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EXECUTIVE SUMMARY

VISION

Ina A. Colen Academy will educate the hearts and minds of students and families in an environment where everyone belongs, works together, and thrives.

MISSION

To cultivate passionate learners in an inclusive school community in which individuality and diversity are valued and students develop understanding and empathy for others through collaboration and active learning.

Ina A. Colen Academy (IACA) seeks to integrate intellectual and academic growth, social/emotional and physical health and well-being, and social responsibility through a whole-child/whole school approach to teaching and learning. IACA's motto – *Sharp Minds, Kind Hearts* – will serve as a daily reminder to every student, staff member, administrator, and parent of the vision and mission that form the foundation of our educational program.

IACA fills a need that will be created by the future development of Calesa, a master-planned community encompassing more than 1500 acres in Ocala, Florida. The community will offer a mix of homes appealing to a diverse range of demographics, and at buildout will be home to over 5,000 families. Schools in the area are at or near capacity and there are limited educational choice options available. With support from the Colen Family Charitable Trust, IACA will offer a unique educational opportunity to Marion County students, while of an easily accessible public charter school option to families moving to Calesa.

IACA strives to promote the long-term development and success of all its students through its focus on physically and emotionally healthy students and lifestyles; a physically and emotionally safe learning environment for students and adults; challenging academics to equip students for successful transition to secondary education and beyond; active engagement in learning and connections to the school and broader community; and access to personalized learning supported by qualified and caring adults. The foundational elements of IACA's educational program include project-based learning; social and emotional learning and development; health and wellness; focus on growth mindset; family involvement; and multi-generational connections.

Social and emotional learning for both students and staff is at the core of IACA's program. We believe that a whole-school approach focused on administrators and staff as well as students is critical for the environment we strive to create. Adults in the school guide students not only in their academic endeavors but in their personal and behavioral growth. They teach students about respect by providing them freedom to make choices (and mistakes) within firm boundaries. As we nurture the whole child, we allow students to see the natural consequences of their behaviors and encourage them to make positive, respectful decisions going forward. Creating a culture of respect reaffirms each student's self-worth and helps them find their role in the larger, more diverse school community.

Project based learning (PBL) builds on a foundation of self-guided exploration and mastery as students progress through primary, intermediate, and middle grades. Students are presented with

problems that have real world impact. In collaborative groups and with guidance from the teacher, they decide how to explore and/or research the problem; pose hypotheses to be proved or disproved; debate with team members; analyze data; and formulate solutions and draw conclusions. Lastly, students have the opportunity to hone their communication skills as the results of their projects are presented to the larger community.

Our comprehensive approach to social and emotional learning (SEL) is based on selected components of the Valor Compass model in conjunction with a comprehensive SEL curriculum. The goal of the Compass model is for students to "find their true north, balance their sharp minds and big hearts, and draw on their noble purpose as they take aligned actions in the world." These concepts are directly modeled and taught through our social and emotional learning curriculum and are integrated throughout academic instruction and daily school activities.

Attention to health and well-being will be evident throughout the campus. These include the importance of exercising the mind and body, making healthy food choices, and recognizing emotional indicators. Teachers, administrators, and students will be encouraged to develop school-wide, class, and/or personal goals to target particular health needs or areas requiring attention. The campus will have a gym, outdoor playground, and green space. The outdoor space can also be used to grow a vegetable garden or other outdoor projects promoting healthy lifestyles. Parents will receive regular updates on health and well-being through newsletters, the school's website, and family activities.

IACA strives to educate the hearts and minds of students and families in an environment where everyone belongs, works together, and thrives. In addition to encouraging parents to serve as resources for the school, we hope to be a valuable resource for our parents by providing programs targeted to their needs. As an inclusive school, our goal is for families to feel as much a part of the IACA community as do their children. We intend to actively recruit volunteers from the nearby retirement community as a way of fostering connections between our students and the seniors, establishing multigenerational relationships will benefit both children and adults.

To ensure the school's success, we have established a governing board of knowledgeable, highly dedicated individuals who are committed to bringing this unique educational choice option to the local community. Together they bring a diverse set of skills and experience that will support the pedagogical health of the educational program as well as the financial and organizational health of the school as a whole.

I. EDUCATIONAL PLAN

Section 1: Mission, Guiding Principles, and Purpose

A. Provide the mission and vision statements for the proposed charter school. The mission is a statement of the fundamental purpose of the school, describing why it exists. The vision statement outlines how the school will operate and what it will achieve in the long term. The mission and vision statement provide the foundation for the entire proposal, and taken together, should illustrate what success looks like.

Vision

Ina A. Colen Academy educates the hearts and minds of students and families in an environment where everyone belongs, works together, and thrives.

Mission

Ina A. Colen Academy will cultivate passionate learners in an inclusive school community in which individuality and diversity are valued and students develop understanding and empathy for others through collaboration and active learning.

Motto

Sharp Minds, Kind Hearts

We will accomplish our vision and mission through a whole-child approach to teaching and learning that integrates intellectual and academic growth, social/emotional and physical health and well-being, and social responsibility. The following core values form the foundation of Ina A. Colen Academy (IACA):

- **Inclusiveness:** We seek to create a school community that reflects the diversity of Marion County. Through a school culture that celebrates and respects differences while acknowledging the commonalities that bind us together as a community, our goal is for students, families, and staff to feel connected to and value their own and others' identities, stories, and lives.
- **Family Involvement:** We understand the importance of families in the development of our students. The school will be a welcoming place that encourages families to be active partners in their children's development. Outreach, support, and educational opportunities will be integral to the school's program.
- **Constructivist Approach:** We believe individuals construct their own understanding and knowledge of the world through experiencing things and reflecting on those experiences. This approach is evident throughout the IACA program, from project-based learning across academic areas to student dialogue circles focused on social and emotional learning.
- **Social Responsibility:** Social responsibility begins with taking responsibility for ones' own actions and having the courage to act on one's beliefs. Consideration of the consequences of a person's or institution's acts as they affect other people and the environment is integrated throughout the curriculum and educational program.

B. Provide the page number(s) of the material within this application that describes how the proposed school will utilize the guiding principles found in section 1002.33(2)(a), F.S.

In accordance with the law, charter schools shall be guided by the following principles:

- *Meet high standards of student achievement while providing parents flexibility to choose among diverse educational opportunities within the state's public school system.* PAGE(S) 3-5, 6-15, 41-42
- *Promote enhanced academic success and financial efficiency by aligning responsibility and accountability.* PAGE(S) 104-107
- *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.* PAGE(S) 32-33, 44-45, 48

C. Provide the page number(s) of the material within this application that describes how the proposed 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 be guided by the following principles:

- *Improve student learning and academic achievement.* PAGE(S) 6-10, 15, 16-33
- *Increase learning opportunities for all students, with a special emphasis on low-performing students and reading.* PAGE(S) 15, 27-34, 39
- *Encourage the use of innovative learning methods.* PAGE(S) 6-11
- *Require the measurement of learning outcomes.* PAGE(S) 29-33, 40-42, 45-47

D. Provide the page number(s) of the material within this application that describes how the proposed charter school will fulfill the optional purposes of charter schools found in section 1002.33(2)I, F.S. If one or more of the optional purposes does not apply to the proposed school, please note "N/A". This section is optional.
In accordance with the law, charter schools may fulfill the following purposes:

- *Create innovative measurement tools.* PAGES(S) 42
- *Provide rigorous competition within the public school district to stimulate continual improvement in all public schools.* PAGE(S) 3-5
- *Expand the capacity of the public school system.* PAGE(S) 3-5
- *Mitigate the educational impact created by the development of new residential dwelling units.* PAGE(S) 3-5, 93
- *Create new professional opportunities for teachers, including ownership of the learning program at the school site.* PAGE (S) 85-90

Section 2: Target Population and Student Body

A. Describe the anticipated student population to be served and how that aligns with the school's mission. Applicants should state if they will give enrollment preference or limit the enrollment process, as allowed by law, to certain student populations defined in section 1002.33(10)(d) & I, F.S. If the applicant intends to have enrollment preferences they should be described in Section 14 of the application.

IACA will employ an anti-discriminatory admissions policy for students in kindergarten through grade eight (approximately five through 14 years of age) who qualify to attend a public school in the county, including out-of-district students who request admission through open enrollment. IACA will not discriminate against a student in its admission process on the basis of race, ethnicity, national origin, gender, disability, or marital status.

IACA's vision and mission do not focus on a specific type of student or area of interest. Rather, we believe that the core values of the school's educational program – inclusiveness that values individuality and diversity; family involvement that supports parents as active partners in their children's education; a constructivist approach that incorporates project-based learning, academic rigor, social and emotional development, and a robust system of supports; and social responsibility integrated throughout the curriculum – will benefit any child and family. We encourage any family interested in the unique educational opportunity offered at our school to seek enrollment. However, realizing how important having a student body that reflects differing perspectives and backgrounds is to the furtherance of our mission, we will actively recruit a diverse cohort of students.

IACA will be located adjacent to Calesa, a master-planned community encompassing more than 1500 acres currently under development in Ocala, Florida. As allowable in accordance with ss. 1002.33(10)I4. IACA intends to limit its enrollment process to target students residing within a reasonable distance of the school. The school may also limit enrollment to target students living in the Calesa community in accordance with s. 1002.33(10)I7., F.S., though no more than 50 percent of student stations will be reserved for this purpose. Enrollment preferences and limitations under s. 1002.33(10)(d) and I, F.S., are described in more detail in Section 14.

To better understand the students who may enroll, we identified seven district-operated elementary schools (i.e., Hammett Bowen, the zoned school; College Park; Dr. N.H. Jones; Marion Oaks; Saddlewood; Shady Hill; and Sunrise) and three district-operated middle schools (i.e., Liberty, the zoned school; Howard; and Osceola) closest to the target area. The comparison elementary schools are located approximately four to 10 miles from the proposed location; the middle schools are between five and 11 miles away.

One of the target area elementary schools earned a school grade of A in 2019, three earned Bs, and three earned Cs. One middle school earned an A and two earned Bs. Detailed data related to each of the schools is provided in Attachment FF. All but one elementary school and one middle school are Title I schools. We analyzed school enrollment data available from FLDOE to better understand the students we will be serving. Based on this review, we anticipate:

- approximately 77 percent will be eligible for the federal free or reduced-price lunch program;
- approximately 60 percent will be minority students;

- approximately nine percent will be English language learners (ELLs) supported through the English for Speakers of Other Languages (ESOL) program;
- approximately 13 percent will be exceptional education students with disabilities receiving special education services through an individual educational plan (IEP);
- some number will be students with disabilities receiving accommodations under a Section 504 plan (Note: Data on Section 504 eligibility are not publicly reported so an anticipated percentage could not be established); and
- approximately six percent will be gifted (Note: Since school-level data for gifted students was not available, we assumed the district average).

During 2018-19,15.4 percent of MCPS' prekindergarten through grade 12 enrollment were exceptional education students with disabilities. Within the comparison schools, the rate was 13.3 percent. Four of the ten comparison schools included a total of 179 prekindergarten children in their enrollment. It is expected that many or even most of those are children with disabilities served in the ESE prekindergarten program. Since PreK ESE would slightly increase the schoolwide ESE rate, and as a charter school IACA will not serve prekindergarten children, we are projecting 13 percent students with disabilities, slightly less than the comparison schools.

B. If a facility has not been identified in Section 16 of this application, state the geographic area which the applicant intends to serve.

The facility will be built adjacent to Calesa, a master-planned community under development on property fronting SW 80th Avenue to the west and SW 38th Street to the north in Ocala, Florida.

C. Provide enrollment projections in the table below for each year of proposed operation. These projections are not enrollment caps. Annual capacity determinations will be made by the governing board in conjunction with the sponsor per section 1002.33(10), F.S.

Grade Level	Number of Students											
	Year 1		Year 2		Year 3		Year 4		Year 5		Year 6	
	Cls	Sts	Cls	Sts	Cls	Sts	Cls	Sts	Cls	Sts	Cls	Sts
K	2	36	3	54	4	72	5	90	6	108	6	108
I	2	36	3	54	4	72	5	90	5	90	6	108
2	2	36	2	36	3	54	4	72	5	90	6	108
3	1	18	2	36	3	54	4	72	5	90	6	108
4	1	22	2	44	2	44	3	66	4	88	5	110
5	1	22	2	44	3	66	3	66	4	88	5	110
6	2	44	3	66	4	88	5	110	5	110	5	110
7			2	44	3	66	4	88	5	110	5	110
8					2	44	3	66	4	88	5	110
Total	**11**	**214**	**19**	**378**	**28**	**560**	**36**	**720**	**43**	**862**	**49**	**982**

D. Provide a brief explanation of how the enrollment projections were developed.

IACA will be located adjacent to Calesa, a master-planned community encompassing more than 1,500 acres that is currently under development. At buildout the community will be home to over 5,000 families. It is anticipated that homes will begin to be available in 2021. Calesa will offer a mix of products appealing to a diverse range of demographics, including one and two story single family detached homes and multi-family attached townhomes. Enrollment projections

took into consideration anticipated interest in and demand for the school based on the following: (1) the increase in population density and school-age children within the target area as the community is developed; (2) anticipated demand for the unique educational program being proposed; (3) the ideal size for such a program; (4) the relatively limited school choice options currently available to families within the target area; and (5) the number of schools within the target area that are at or near capacity (i.e., do not have seats available for student transfers through controlled open enrollment). A report addressing forecasted student demand resulting from the buildout is provided as Attachment T.

E. Briefly explain the rationale for the number of students and grade levels served in year one and the basis for the growth plan in subsequent years as illustrated in the table above.

As illustrated in the table above, IACA's opening projection is 214 students in kindergarten through grade six. The school will reach maximum grade offerings (i.e., kindergarten through grade eight) in Year 3 and anticipate full enrollment of 982 by Year 6. Enrollment projections are designed to provide a strong foundation for the school by starting out relatively small while providing access to as many grade levels as possible at the time of opening. This is particularly important given that the school will be located within a newly developed community and we anticipate that the full range of grade levels will be represented by families moving to Calesa.

As described throughout this application, the focus on social and emotional learning, interpersonal relationships, and the overall culture of the school are critical to achieving its vision. Relatively slow growth will allow the school leader to select the strongest teaching candidates through a hiring, recruitment, and retention process that is rigorous and mission-aligned and to implement a comprehensive system of professional development that addresses all aspects of the educational program. The proposed growth pattern allows for a critical mass of teachers to receive intensive training and professional development in Year 1, and then combine the intensive training initiatives with peer mentoring/coaching during subsequent years.

Section 3: Educational Program Design

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

Ina A. Colen Academy will promote the long-term development and success of all our students through a whole child approach focused on physically and emotionally healthy students and lifestyles; a physically and emotionally safe learning environment for students and adults; active engagement in learning and connections to the school and broader community; access to personalized learning supported by qualified and caring adults; and challenging academics to equip students for successful participation in a global environment.[1] The most significant elements comprising our program – project-based learning, social and emotional learning and development, and health and wellness – as well as our focus on growth mindset, family involvement, and multi-generational connections are described below.

Project-Based Learning

Derived from the work of John Dewey, project-based learning (PBL) provides a structure through which students can demonstrate mastery of a subject by creating and presenting a research-based project that is driven by their own interest in a topic and allows them to learn to work within the same parameters as real researchers. Continuing along the arc of constructivist learning that provides the basis for skills development in our primary grades, PBL builds on a foundation of self-guided exploration and mastery as students progress through intermediate and middle grades. Students are presented with a problem, a question, or a situation with real world impact. In self-selected groups, they are then responsible for deciding how to explore and/or research the problem; they pose hypotheses and then set about either proving or disproving; they debate with team members; they analyze data; and they formulate solutions and draw conclusions. Students then present the results of their projects to the larger community.

PBL can take several forms. A traditional project-based activity begins with the teacher assigning a topic to be investigated. Students create a written, oral, visual or multimedia project as a culmination of extended study on the topic. In a more student-driven model, learning is focused on the process of solving a problem and acquiring knowledge. It generally begins with the teacher presenting a challenge or a problem to be solved instead of a topic to study. Students must identify what they already know and need to learn, then find and apply knowledge. Inquiry-based learning is similar to problem-based, but in this version of PBL the students themselves generate the question or challenge to be addressed. Starting with our kindergarteners, IACA students will progress through increasingly more self-directed and long-term PBL activities.

While PBL is student-driven, it is facilitated and guided by the teacher, who ensures grade level standards are incorporated into student learning and carefully observes to ensure that students are meeting benchmarks and not veering off course in their investigations and inquiries. As students navigate the process of planning and executing the project design, they gain confidence, organizational skills, the ability to re-calibrate mid-project, interpersonal skills, communication skills, and the excitement of discovery. Authentic PBL units implemented at IACA will include the following core components:

- Content Knowledge and Skills
- Authenticity and Relevance
- Inquiry

[1] http://www.wholechildeducation.org/

- Student Voice and Choice
- Collaboration
- Community Partnerships (when applicable)
- Feedback and Revision
- Publicly Presented Produce
- Reflection

Key differences between more traditional use of projects and authentic PBL are summarized in the table below.[2]

Project	Project-Based Learning Unit
• The project is a culminating event that happens at the end of the unit after all student learning has already taken place. • The knowledge and skills taught in the unit are not necessarily needed to complete the project and the project itself does not typically reflect all of the student learning. • Oftentimes the project has no real-world connection and after being graded the project is no longer used.	• It poses an authentic problem, challenge, need, or issue at the start of the unit in the form of an entry event. • Students receive the rubrics outlining what tasks or end products they will have to create. • From the very start of the project students see their need to learn the course content and skills in order to complete each step or benchmark of the project. • Their end goal is clear from the beginning and their learning is meaningful because they need the content and skills in order to solve the problem, challenge, need, or issue that has been posed to them. • Whenever possible, the PBL unit involves a community partner and ends with a publicly presented product that will be used even after the unit has been completed.

Social and Emotional Learning and Development

A key component of the IACA educational program is its focus on social and emotional learning (SEL) for both students and staff. We believe that a whole-school approach focused on administrators and staff as well as students is critical for the environment we strive to create. Our comprehensive approach to SEL is based on selected components of the Valor Compass program implemented at Flagship Academy and Valor Voyager Academy in Nashville, Tennessee in conjunction with a comprehensive SEL curriculum.

Flagship and Valor are highly successful charter schools operated by Valor Collegiate Academies,[3] a network of intentionally diverse charter schools that promotes a model of "balanced education" in which students are taught and encouraged to "find their true north, balance their sharp minds and big hearts, and draw on their noble purpose as they take aligned actions in the world."[4] The model is illustrated in the graphic on the following page.

Each of the five interdependent disciplines is supported by two associated habits of behavior that are fostered within administrators and teachers as well as students:

[2] https://www.magnifylearningin.org/what-is-project-based-learning
[3] https://valorcollegiate.org/
[4] Dickson, D., & Carlson, R. M. (n.d.). Circle Handbook. *Circle Handbook*. Nashville, TN: Valor Collegiate Academies.

Valor Compass & Balanced Education



1. True north is supported by "habits of center"
   - Balance – self regulation to create a sense of calmness and well-being
   - Presence – paying attention; being in the present moment
2. Sharp mind is supported by "habits of mind"
   - Curiosity – open-minded, non-judgmental exploration and discovery
   - Diversity of Perspective – seeking multiple perspectives in the service of social justice
3. Big heart is supported by "habits of heart"
   - Courage – embracing one's worthiness and appropriate risk-taking
   - Kindness – gentle, supportive, and generous engagement with oneself and others
4. Noble purpose is supported by "habits of being"
   - Joy – full focus, involvement, and enjoyment in an activity aligned with one's values
   - Identity – positive sense of self; development of a "value-based self-story"
5. Aligned actions are supported by "habits of doing"
   - Determination – sustained passion for motivation to achieve a long-term goal
   - Integrity – inner alignment between values and action

In addition to being integrated throughout academic instruction and morning and closing meetings, these concepts are addressed directly through modeling and strategically designed activities during Compass Circles. Circles are facilitated group meetings implemented with students in grades five through eight as well as with adults within the school community (e.g., administrators, teachers, support staff).

The Compass model will be supported through direct instruction in social and emotional skills using Sanford Harmony, Caring School Community, or a similar program. Both of these programs have been recognized by the Collaborative for Academic, Social, and Emotional Learning as CASEL SELect programs (i.e., have been evaluated and determined to be well-designed with a systematic approach to SEL instruction; to include high quality training and implementation supports; and to be evidence-based).

Designed for prekindergarten through grade six, Sanford Harmony is currently used in MCPS as its Tier 1 core program for elementary grades and has been mapped to the district social studies curriculum. The program consists of approximately 20 weekly lessons covering five thematic units consisting of approximately 20 lessons addressing diversity and inclusion, empathy and critical thinking, communication, problem solving, and peer relationships. Funded through a philanthropic donation, Sanford Harmony is available at no cost.

Designed for kindergarten through grade eight, the Caring School Community, Second Edition (CSC2), is an SEL and discipline program that provides five lessons per week for 28-30 weeks of instruction depending upon grade level. The program is developed to help students become "caring, responsible members of their school communities and, ultimately, to grow into humane,

principled, and skilled citizens of a democratic society."[5] While there is a cost associated with the program, it includes a comprehensive middle school program with advisory lessons and guidance for integrating SEL across all subject areas.

Both programs align with CASEL's core SEL competencies and the Compass model; include strategies for engaging caregivers and strengthening the school community as a whole; and include tools to assess program implementation and effectiveness.

Health and Wellness

Leading national education organizations, including the Council of Chief State School Officers, the National School Boards Association, the American Association of School Administrators, and the Association for Supervision and Curriculum Development, recognize the close relationship between health and education, as well as the need to foster health and well-being within the educational environment for all students.[6] It is our goal for teachers and administrators to be influential role models for our students. IACA will support the health and wellness of students and staff through a focus on good nutrition, physical activity, safety, and preserving a healthy environment. Our focus on health and wellness will be schoolwide. We believe a healthy school environment reduces stress, boosts job satisfaction and supports employees to perform at their best. Healthy employees are absent fewer days and more likely to stay in their positions, creating the continuity and stability that's essential for students' success. IACA students will learn—through lessons and by example—to value their own health and that of the environment.

The focus on health and well-being will be evident throughout the campus. Age-appropriate visuals will provide regular reminders of the importance of exercising the mind and body, making healthy food choices, and recognizing emotional indicators. For example, rather than simply posting a food pyramid in the cafeteria or a health education room, the school will post more detailed visuals related to the body, muscles, heart health, vitamins, proteins, healthy recipes, and reminders for students in the lunch line to select a balanced meal. The school will also support healthy food choices and the development of positive long-term eating habits for promoting the consumption of healthy food through our food service program.

Teachers, administrators, and students will set school-wide, class, and/or personal goals to target particular health needs or areas requiring attention. At a minimum, students in kindergarten through grade six will have 150 minutes per week of regular physical activity during their physical education special area. Physical activity also will be integrated into lessons, brain breaks, and brief recess times whenever possible. Middle grades students will have one semester of physical education and one semester of health annually. The campus will have a gym, outdoor playground, and green space. The outdoor space can also be used to grow a vegetable garden or other outdoor projects promoting healthy lifestyles. Parents will receive regular updates on health and well-being through newsletters, the school's website, and family activities.

Growth Mindset

The concept of growth mindset, in contrast to fixed mindset, is based on the work of Stanford University psychologist Carol Dweck. She explains that the way students perceive their abilities

[5] Caring School Community, Second Edition. Program Preview. Center for the Collaborative Classroom. https://www.collaborativeclassroom.org/wp-content/uploads/2017/10/MKT2494-CSC2-Program-Preview_web.pdf

[6] Centers for Disease Control and Prevention. CDC 24/7: Saving Lives, Protecting People™ https://www.cdc.gov/healthyyouth/health_and_academics/index.htm#7

– their mindsets – generally fall into one of two opposing categories: a fixed mindset or a growth mindset. [7] Students with a fixed mindset believe their skills, talents and overall intelligence are fixed traits. They may resist learning and trying to improve, typically feeling embarrassed when not understanding something. In contrast, students with a growth mindset know they can develop their skills and talents through effort and persistence, as well as being receptive to lessons and feedback. They generally believe they can improve through hard work and trying new learning methods.

Students will be supported in developing a growth mindset throughout the IACA educational program through direct and indirect support from teachers. Examples include:[8]

- Providing feedback that highlights the value of planning and trying different learning strategies (e.g., Being told "Great job! The study plan you made helped a lot." Instead of "Great job! You're so smart!").
- Using diverse teaching strategies that vary the way content is presented and how students are able to demonstrate understanding.
- With students in intermediate and middle grades, explicitly teaching about the effect on the brain when people push through their comfort zones to grasp difficult concepts.
- Asking students to expand or elaborate upon their answers (a core element of PBL).
- Using strategies such as goal-based journaling.
- Modeling and encouraging students to use growth mindset language (e.g., "I can't do that math problem – yet.")

Supported Family Involvement and Multi-Generational Connections

IACA strives to educate the hearts and minds of students and families in an environment where everyone belongs, works together, and thrives. As described in Section 15, in addition to encouraging parents to serve as resources for the school through active participation in activities, we hope to be a valuable resource for our parents by providing programs targeted to their needs. As an inclusive school, our goal is for families to feel as much a part of the IACA community as do their children. We intend to actively recruit volunteers from the nearby retirement community as a way of fostering connections between our students and the seniors. We believe the opportunities for multigenerational relationships will benefit both children and adults.

B. Describe the basic learning environment (e.g., classroom-based, independent study, blended learning), including rationale for class size and structure and how the learning environment supports and is consistent with the mission.

IACA will offer a safe, supportive learning environment in which students work toward and achieve mastery of rigorous academic standards. Project-based classrooms will be highly interdisciplinary by nature, each subject playing a role in the larger questions that students address in their research and reporting. Students work together on all aspects of projects, from planning to research and data collection to reporting on findings. This work drives social development and interpersonal problem solving, as well as communication and leadership skills.

Because work is communal in nature, groupings are flexible and easily accessible for student use. Further, given PBL classrooms are active and constructivist, students will be able to move

[7] Dweck, C. S. (2016). Mindset: the new psychology of success. New York: Ballantine.
[8] Guido, M. (2019, September 25). 10 Ways to Instill a Growth Mindset in Students: Prodigy. Retrieved from https://www.prodigygame.com/blog/growth-mindset-in-students/.

freely to meet their own intellectual inquiry needs and to access tools available to them to continue to build their skill sets and their knowledge. Interactive classes will foster movement, space and opportunity for group and team collaboration, access to technology, independent work stations, and small group or individual student working areas. Within the school day and school week, daily morning and closing meetings and weekly Compass Circles will support students' social and emotional learning and foster strong interpersonal relationships with peers and adults alike. A sense of belonging and connectedness to the school environment is known to have a positive influence on student engagement and academic performance.

Class size will be in accordance with ss. 1003.03 and 1002.33(16)(b)3., F.S. (i.e., maximum number of students assigned to each core curricula course will not exceed a school average of 18 for kindergarten through grade three and 22 for grades four through eight).

C. Describe the research base used to design the educational program.

IACA is committed to educating the "whole child." The educational program's most significant elements are PBL, social and emotional learning and development, and health and wellness.

Research Base and Support for Whole Child Education

Research related to whole child educational approaches describe the need to deliver a comprehensive, well-rounded, challenging education to students to prepare them for long-term success in the 21st century. The current rigorous Florida Standards and high grade-level expectations, in conjunction with selected curricula and instructional strategies, are the basis for establishing students' background knowledge of core content. In *Making the Case for Educating the Whole Child*, the Association for Supervision and Curriculum Development (ASCD) specifies that a "strong foundation in reading, writing, math, and other core subjects is still as important as ever, yet by itself is insufficient for lifelong success."[9] To seamlessly implement instruction in core content and make learning meaningful to students, teachers who are student-centered, caring, and able to make connections to students are critical to student achievement.

Data also suggests that physical activity can have a positive impact on skills that are linked to student achievement, such as improved concentration, maintaining sustained attention, and behavior. Research indicates physical activity can also positively impact attendance and grades. On the contrary, insufficient diets and food intake have been linked to lower grades and attendance, grade retention, and poor concentration.[10]

Research Base and Support for Project-Based Learning

Project-based learning is an alternative to textbook-driven instruction that has been shown to yield a number of benefits for students, ranging from deeper learning of academic content to stronger motivation to learn. Studies comparing learning outcomes for students taught via PBL versus traditional instruction show that when implemented well and with a focus on standards alignment, PBL increases long-term retention of content, helps students perform as well as or better than traditional learners in high-stakes tests, improves problem-solving and collaboration skills, and improves students' attitudes towards learning. Compared to traditional instructional

[9] Making the Case for Educating the Whole Child, ASCD Learn. Teach. Lead. 2012 http://www.wholechildeducation.org/assets/content/mx-resources/WholeChild-MakingTheCase.pdf

[10] Health and Academic Achievement, National Center for Chronic Disease Prevention and Health Promotion, Division of Population Health, CDC, May 2014.

methods, students engaged in small-group learning achieve better, retain information longer, and have reduced dropout rates, improved communication and collaboration skills, and a better understanding of professional environments.[11, 12, 13]

Several significant findings were identified in a review of literature on the effectiveness of PBL in prekindergarten through grade 12,.[14] PBL was perceived positively by participants and described as fostering greater engagement with subject matter. Students reported enjoying the active, hands-on approach to content, as well as improved perceptions of the subject matter. In studies of the effects of PBL and characteristics associated with school failure in traditional classrooms, teachers reported that the real-world focus of the projects allowed students who did not generally shine in academic discussions to share their knowledge about subject-matter that was familiar and accessible. Teachers also reported a reduced need for disciplinary actions during project-based study, citing increased student engagement as the chief reason.

In a study targeting middle school students and science education, researchers from the University of Michigan, the University of Arizona, and Detroit Public Schools studied 5,000 students in grades seven and eight.[15] Half the students received traditional science instruction and half were taught using a PBL-based science curriculum. The students in the PBL group engaged in long-term collaborative investigations. These students scored higher on the state assessment, and the gains lasted more than one year. The authors concluded that when the curriculum is highly specified, developed, and aligned with professional development and administrative support, inquiry-based curriculum can lead to standardized achievement test gains.

Research Base and Support for Social and Emotional Learning and Development

The Aspen Institute National Commission on Social, Emotional, and Academic Development was created to engage communities in re-envisioning learning to encompass its social and emotional as well as cognitive dimensions so that all students can succeed in school, careers, and life. Commission members included leaders from education, research, policy, business, and the military. In 2018 they published a report entitled From a Nation at Risk to a Nation at Hope.[16] The report analyzes what is known about learning itself and what this means for meaningful education reform. The following are just some of the notable findings included in the report:

- Learning depends on deep connections across a variety of skills, attitudes, and character traits that fall into three broad categories: (1) skills and competencies; (2) attitudes, beliefs, and mindsets; and (3) character and values. These traits develop interdependently and are often processed in the same parts of the brain. When learning environments are constructed to teach these skills, attitudes, and values as mutually reinforcing and central

[11] Strobel, J., & van Barneveld, A. (2009). When is PBL more effective? A meta-synthesis of meta-analyses comparing PBL to conventional classrooms. The Interdisciplinary Journal of Problem-Based Learning,
[12] Walker, A. & Leary, H. (2009). A problem-based learning meta-analysis: Differences across problem types, implementation types, disciplines, and assessment levels. Interdisciplinary Journal of Problem-based Learning,
[13] Johnson, D. W., Johnson, R. T., & Stanne, M. E. (2000). Cooperative learning methods: A meta-analysis (PDF). Minneapolis, MN: University of Minnesota Press.
[14] Holm, M. (2011). Project-Based Instruction: A review of the literature on effectiveness in prekindergarten through 12th grade classrooms. Rivier Academic Journal, (7)
[15] Geier, R., Blumenfeld, P. C., Marx, R. W., Krajcik, J. S., Fishman, B., Soloway, E., & Clay-Chambers, J. (2008). Standardized test outcomes for students engaged in inquiry-based science curricula in the context of urban reform. Journal of Research in Science Teaching, 45(8), 922-939.
[16] http://nationathope.org/

to learning, children are better equipped to engage in rigorous academic content and learning experiences and make greater academic progress.

- A review of more than 200 programs for teaching social, emotional, and cognitive competencies in kindergarten through grade 12 found students' skills, behaviors, attitudes, and academic performance improved significantly while their emotional distress and behavior problems decreased. Moreover, these programs were beneficial across student populations, regardless of race or income.
- Social, emotional, and cognitive development is especially important for children who have experienced trauma or adversity. These external influences can place bodies and minds in a state of stress or high alert that interferes with learning and growth. Teaching students the skills and providing settings that build their efficacy and self-control, providing them with supportive adult relationships, and directly addressing their physical, emotional, and mental health needs can buffer against the negative effects of stress.
- Evidence confirms that supporting students' social, emotional, and cognitive development relates positively to all of the traditional measures of school performance: attendance, grades, test scores, graduation rates, success in college and careers, more engaged citizenship, and better overall well-being.

There is also substantial evidence in support of the specific program models proposed for IACA. In addition to establishing SEL as their foundational program, the Valor academies have consistently outperformed the district and the state in both student achievement (top five percent in the state) and student growth (top one percent in the state). In addition, low-income students outperformed their middle and upper income peers in the district and state levels, inverting the "achievement gap" two years in a row.

In its evaluation of SEL programs, CASEL reviewed multiple studies involving Caring School Community and identified statistically significant improvement in academic performance, prosocial behavior, academic behaviors, climate, and social and emotional skill performance; reduced conduct problems and emotional distress; and substance abuse prevention. With regard to Sanford Harmony, a study of over 600 elementary students participating in the program revealed that participants demonstrated fewer aggressive behaviors and had a higher overall mean grade (i.e., average report card grades on language, writing, math, science, and social studies) compared to students in the comparison group. Students who participated in the program also reported greater feelings of classroom identification and school liking.

Research Base and Support for Health and Wellness

Studies have shown a significant correlation between academic performance and health problems such as mental illness, depression and anxiety, vision and oral health problems, asthma, teen pregnancy, malnutrition, obesity, chronic stress, aggression and violence, unsafe sexual activity, unhealthy eating, physical inactivity and substance abuse. Effects include poor retention, school failure, grade retention, school dropout, absenteeism and poor concentration. [17]

[17] Matingwina, T. (September 19th 2018). Health, Academic Achievement and School-Based Interventions, Health and Academic Achievement. IntechOpen, DOI: 10.5772/intechopen.76431. https://www.intechopen.com/books/health-and-academic-achievement/health-academic-achievement-and-school-based-interventions

In a report on student health and academic achievement, the Centers for Disease Control and Prevention[18] reviewed existing research on the impact of health and wellness on academic achievement. They defined academic achievement as: (1) academic performance (e.g., grades; standardized test scores; graduation rates); (2) education behavior (e.g., attendance; dropout rates; behavioral referrals); and (3) cognitive skills and attitudes (e.g., concentration; memory; mood). Evidence of the relationship between nutrition and academic achievement included:

- Student participation in the federal school breakfast program is associated with increased academic grades and standardized test scores, reduced absenteeism, and improved cognitive performance (e.g., memory).
- Skipping breakfast is associated with decreased cognitive performance (e.g., alertness, attention, memory, processing of visual display, problem solving) among students.
- Lack of adequate consumption of specific foods, such as fruits, vegetables, or dairy products, is associated with lower grades among students.

Evidence of the relationship between physical activity and academic achievement included:

- Students who are physically active tend to have better grades, school attendance, cognitive performance (e.g., memory), and classroom behaviors (e.g., on-task behavior).
- Higher physical activity and physical fitness levels are associated with improved cognitive performance (e.g., concentration, memory) among students.
- More participation in physical education class has been associated with better grades, standardized test scores, and classroom behavior (e.g., on-task behavior) among students.
- Increased time spent for PE does not negatively affect students' academic achievement.
- Time spent in recess has been shown to positively affect students' cognitive performance (e.g., attention, concentration) and classroom behaviors (e.g., not misbehaving).
- Brief classroom physical activity breaks (i.e., 5-10 minutes) are associated with improved cognitive performance (e.g., attention, concentration), classroom behavior (e.g., on-task behavior), and educational outcomes (e.g., standardized test scores, reading literacy scores, math fluency scores) among students.
- Participation in extracurricular physical activities such as interscholastic sports has been associated with higher grade point averages (GPAs), lower drop-out rates, and fewer disciplinary problems among students.

Good health is critical to ensuring that students can make the most of their educational opportunities. A foundation of good nutrition and physical activity enriches students' readiness to learn. A school environment that supports students' social and emotional well-being will propel young people to do better on all levels of academic achievement: academic performance, classroom behavior, and cognitive skills and attitudes.

A healthy school workplace also helps retain teachers and staff, reduces stress, boosts job satisfaction and supports employees to perform at their best. They are absent fewer days and more likely to stay in their positions, creating the continuity and stability that's essential for students' success. Teachers and staff are also influential role models for students.

[18] Centers for Disease Control and Prevention. (2014). Health and Academic Achievement. https://www.cdc.gov/healthyyouth/health_and_academics/pdf/health-academic-achievement.pdf.

D. Provide a sample daily schedule and school annual calendar, including the annual number of days and hours of instructional time as Attachment B. (Note: If approved, the Governing Board will formally adopt an annual calendar.)

See Attachment B.

E. Explain how the services the school will provide to the target population support attainment of the state-adopted standards, as required by section 1002.33, F.S.

IACA's educational program promotes active and engaged learning, fully embracing the potential of all students to learn and thrive. That said, we understand that our students will bring diverse backgrounds and experiences. Ability, prior learning, rate of learning, social and cultural background, native language, maturity, and individual preferences are all factors in the learning process. Instructional materials have been, and will continue to be, selected with careful consideration for their alignment with the relevant standards and their suitability for meeting the needs of the widest range of student abilities. Quality standards-based materials will be coupled with teacher training focused on developing each student's natural curiosity and independence.

We believe that knowledge is interrelated and that individuals learn best by doing. For this reason, our educational program utilizes inquiry and project-based learning for cross-disciplinary and in-depth learning opportunities. The interrelatedness of subjects will be highlighted, helping students retain, transfer, and generalize knowledge. Teacher training for PBL will focus on ensuring projects incorporate all appropriate and applicable grade level standards in English language arts, math, and content areas. Evidence of instruction in the applicable standards will be a required component of teachers' lessons plans.

Through the school's multi-tiered system of supports (MTSS), described in detail in Section 4, students in need of remediation or not making adequate progress towards mastery of the Florida Standards will have access to supplemental instruction and intensive interventions to remediate deficit skills. The school's MTSS leadership team and student-specific problem-solving/response to intervention (PS/RtI) teams will be implemented using FLDOE's Guiding Tools for Instructional Problem Solving, Revised as an operating guide. The teams will conduct ongoing evaluation of core and supplemental curriculum and interventions as well as implement the PS/RtI process for individual students who are experiencing academic or behavioral challenges.

Formal and informal assessments conducted throughout the year (see Section 5) will be used in conjunction with the annual state- and district-wide assessments to ensure students are making adequate progress toward grade level standards. Our MTSS will ensure students who are struggling and/or below-level will be identified so that any problems can be effectively remediated. In addition, the administrative team will closely oversee the implementation of programs for students with special learning needs, including individual educational plans (IEPs) and Section 504 plans for students with disabilities, Eps for gifted students, and English language learner (ELL) plans in accordance with district and state requirements to ensure students are receiving the instruction and supports needed to achieve mastery of the standards.

An online student information system will be made available to enable the school's administration, teachers, students, and parents to share and access information quickly and efficiently. Functionality such as parent access to students' grades and regular posting of homework assignments will foster communication and family involvement and support. At this time, we anticipate utilizing the same Skyward Family Access system as MCPS.

Section 4: Curriculum and Instructional Design

A. Describe the school's curriculum in the core academic areas, illustrating how it will prepare students to achieve Florida standards. Describe the primary instructional strategies that the school will expect teachers to use and why they are appropriate for the anticipated student population. Describe the methods and systems teachers will have for providing differentiated instruction to meet the needs of all students, including how students who enter the school below grade level will be engaged in and benefit from the curriculum and the formalized multi-tiered level of supports that will be provided to students who are performing below grade level.

Core Academic Curriculum

Through the school's interdisciplinary project-based approach and focus on the whole child, IACA will provide students access to key subject area knowledge. Our curriculum will include instruction to enhance the educational experience and foster problem solving, creativity, and empathy while developing core academic knowledge. The academic curriculum comprises our educational program design, Florida's academic standards, the specific content to be covered in the courses we will offer, and the selected research-based instructional materials.

In developing the curriculum plan, instructional materials adopted by MCPS and other materials included on the Florida Department of Education (FLDOE) list of approved materials at the time of this writing were reviewed, as well as other standards- and content-aligned materials. However, we note that on January 21, 2019, Governor DeSantis issued Executive Order 19-32 authorizing the Commissioner of Education to conduct a review of the current Florida Standards in English language arts (ELA) and mathematics for kindergarten through grade 12 and recommend revisions. As a result, FLDOE suspended the instructional materials adoptions scheduled to occur in 2018-19 (math) and 2019-20 (ELA) and issued contract extensions for the existing vendors. On January 24, 2020, the Governor and Commissioner Corcoran announced the review was complete and recommended revisions to the standards had been submitted to the Governor for approval.

The proposed timeline for completion anticipates the new ELA and math standards to be submitted to the State Board of Education approved by March 2020 (shortly after this application is submitted); revisions to the Course Code Directory and course descriptions by May 2020; and restarting the instructional materials review and adoption process by April 2020. As a result, newly adopted instructional materials aligned to the new ELA standards are expected to be available for the 2021-22 school year; materials aligned to the new mathematics standards will be available the following year.

The candidate selected to be the instructional leader for the school will have personal experience with particular programs and texts and will be best suited to select from the materials available at the time the school opens. Therefore, final decisions regarding specific text or instructional materials will be made once the principal is hired. That said, IACA is committed to using an inquiry-based, action-oriented curricula as much as possible in alignment with our educational program. The specific instructional materials referenced in the various content areas below are under consideration because of their suitability with a student-focused PBL approach and usability with a wide range of students (e.g., accessibility; ease of differentiation for students with disabilities, English language learners, and gifted students; embedded assessment) as well as for their alignment with the content, sequence, and depth of the current Florida Standards.

To focus attention on the critical ideas and information essential to each content area and course, curriculum maps will be developed and used to plan and monitor instruction. Curriculum mapping and cross-walks are extremely useful tools for creating a "big picture" for curriculum decision making, as the maps allow teachers to document the relationships between every component of the curriculum, including content and standards, instructional materials, and assessments. In addition to ensuring standards are addressed in a logical, coherent, and sufficiently comprehensive manner, benefits of curriculum maps include:

- Organizing instruction into a clear timeline
- Identifying opportunities for integration across curriculum areas
- Identifying gaps and redundancies in instruction
- Matching instruction to assessment
- Communicating instructional plans to administrators, teachers, parents, and students

English Language Arts

IACA's commitment to offering students a world class education begins with academic excellence in reading, writing, oral communications, and the interpretation of literature. The language arts program will reflect critical and creative thinking and inspire active engagement in reading, writing, speaking, listening and viewing. Moreover, IACA will emphasize the interdisciplinary nature of language arts skills such as listening, speaking, reading and writing across all curriculum areas and grade levels.

The Language Arts Florida Standards (LAFS) will drive instruction in all content areas. Our teachers will utilize benchmarks for language arts instruction and coursework to prepare students for mastery of the standards. The content will include, but not be limited to, the study and interpretation of traditional and contemporary literature, application of the writing process, formal grammar and usage, and effective use of speaking and listening skills, higher-order reading skills, and study skills enabling success in middle school, high school, and beyond.

As a school that strives to promote an interdisciplinary approach to learning, reading and language arts are the frontline for integrating all other subjects. As students engage in inquiry driven PBL, their use of language and literacy guides the discovery of new ideas and aids them in articulating their findings. In order to effectively carry out the planning and execution of a project, students must be able to read, comprehend and analyze text, to verbally pose thoughtful questions to peers and interview subjects, to record and decipher their findings, and to communicate the result of their inquiry to the larger community through written or spoken word.

ELA – Reading

The reading curriculum is provided as Attachment D.

ELA – Writing

To build a foundation in literacy for college and career readiness, students need to learn to use writing as a way of offering and supporting opinions, demonstrating understanding of subjects they are studying, and conveying real and imagined experiences and events. While some writing skills (e.g., the ability to plan, revise, edit, and publish) are applicable to any type of writing, others are more properly defined in terms of specific writing types (e.g., argument, informative/ explanatory, narrative). As students learn that a key purpose of writing is to communicate clearly

to an external audience, they begin to adapt the form and content of their writing to accomplish a particular task and purpose.

Teachers will be expected to provide students significant opportunities and time to write, producing numerous pieces over short and extended time frames throughout the year. Students will be required to write on a daily basis across the curriculum. Formal instruction in the writing process begins in grade one with the introduction of planning, drafting, and editing written products. The steps of the process extend over time such that by grade four they include planning, drafting, sharing, evaluating, revising, editing, and finally publishing. Strategic pacing and instruction help develop effective writers and enhance student performance on district and State writing assessments. The use of technology in the writing process will further enhance the program, as students publish their works.

At this time, we intend to use Core Knowledge Language Arts (CKLA) as the basis for ELA instruction in the elementary grades. In addition to explicit instruction in handwriting, spelling, and grammar, writing instruction is integrated into reading instruction throughout kindergarten through grade five. As different writing genres are presented, the writing process is reinforced through a scaffolded gradual release process that includes teacher modeling, group practice, independent practice, and independent application. This approach helps both teachers and students break down the task and understand it better. Teachers and students develop a common vocabulary for talking and thinking about writing. Students learn to be constructively critical of their own work and to improve the quality of their writing.

As students progress from primary to intermediate grades, writing instruction will shift from a "writing" workshop approach to a "writer's" workshop approach. While writing workshops center on the foundational skills of writing (e.g., what is present on the page), in a writer's workshop the teacher focuses more directly on the writer – the person crafting the text. They help students choose topics, purposes, and audiences for their work and offer suggestions to guide the writer's decision-making process. A writer's workshop comprises four essential stages:

- Mini-lesson – Short, teacher-led discussion or lesson used to deliver explicit instruction focused on a single aspect of writing (5-10 minutes)
- Status of the class – Quick check of what each student is working on (2-5 minutes)
- Writing time – Students write; teacher writes and/or conferences with individual or small groups of students (20+ minutes)
- Sharing – Writers (students and teacher) read what they have written and seek feedback from their audience (5+ minutes)

At the middle school level, the language arts program will provide instruction and promote academic excellence in reading, writing, oral communications, and the interpretation of literature through critical and creative thinking. Teachers will utilize benchmarks for language arts instruction/coursework to prepare students for mastery of those standards. The program will further develop student's ability to communicate clearly, accurately and effectively in speech and writing. The content will include, but not be limited to, the study and interpretation of traditional and contemporary literature, application of the writing process, formal grammar and usage, and effective use of speaking and listening skills, higher-order reading skills, and study skills enabling success in school and beyond when entering the world of work. Technology will be integrated into lessons in an effort to help students develop competencies in language arts.

Mathematics

The Florida Mathematical Practices are habits of mind that describe types of expertise schools should infuse throughout math instruction and develop in their students, ensuring they are can:

- Make sense of problems and persevere in solving them
- Reason abstractly and quantitatively
- Construct viable arguments and critique the reasoning of others
- Model with mathematics
- Use appropriate tools strategically
- Attend to precision
- Look for and make use of structure
- Look for and express regularity in repeated reasoning

Research in mathematics education has consistently found that understanding and skills are best developed when students are allowed to wrestle with new ideas, create and defend solutions to problems, and participate in a mathematical community of learners.[19] Standards-based mathematics instruction at IACA will integrate basic skills development with problem solving. We believe students develop computational fluency through extensive opportunities to practice basic skills, and that investigating new ideas and solving meaningful problems (such as those encountered through PBL) is the best mechanism for providing those opportunities.

Mathematics

IACA will provide an organized, student-focused environment in which mathematics instruction is active and inquiry based. The youngest students learn by manipulating concrete materials and internalizing understanding which later translates to abstract mathematic concepts. Easily accessible, tactile materials allow students to practice concepts like sorting, counting, addition, subtraction, multiplication and division in a way that is natural to the child's mode of play. In this way, students learn at their own pace with materials that intrigue them. They have freedom to learn in the way that best suits them in the often rigid world of mathematics. Ultimately, young students allowed to learn at their own pace with self-correcting materials learn independence, self-confidence, and problem-solving.

As students progress through mathematics literacy and skill building in the elementary grades, shift from concrete problems and manipulatives to abstract concepts like long division and multiplication, squaring, and cubing. PBL makes the shift easier and more relatable by tying abstract concepts to real world problems instead of presenting them in isolation. Supplementing direct math instruction with intentional integration of math standards into students' projects makes the experience relevant and engaging, spurring further inquiry and skill building.

In the middle grades we will continue to build on the concrete to abstract trajectory to increasingly complex theories and concepts. Middle grades math courses provide instruction and promote academic excellence in basic math skills, geometry, algebra, problem solving, and mathematical reasoning. Our middle grades mathematics classes will include:

- Teaching and learning for conceptual understanding and fluency
- Teachers probing for justifications by using higher level questioning strategies and probe

[19] Van de Walle, J.A. (2012). *Elementary and middle school mathematics field experience guide: Teaching developmentally*. Allyn & Bacon.

for justification, always asking "Why?"
- Discussion of varied problem-solving approaches
- Establishing context by drawing connections between problem situations and expressions/equations
- Students defending their actions and answers both verbally and in writing
- Students working collaboratively (in partners and groups)
- Teachers using models during demonstrations
- Students modeling math ideas with manipulatives, pictures, graphs, and technology
- Emphasis on students making decisions about which tools to use
- Accurate calculations
- Precise mathematical communication and attention to math vocabulary
- Questioning to prompt students to observe for patterns or relationships
- Investigations that allow students to gather data, look for patterns, and interpret results

At this time, we are considering *enVision Florida Mathematics* (Pearson) or *Eureka Math* (Great Minds) for kindergarten through grade eight, with supplemental support through iReady Math and/or DreamBox, CPALMS, and strategies and tools such as thinking maps. Both of these programs received very high ratings[20] from EdReports.org, an independent nonprofit group that conducts rigorous reviews of instructional materials, including state-specific editions based on state standards as well as national editions. They were highly rated in all three gateway areas assessed – alignment to the standards; the extent to which the standards are treaded with appropriate depth and quality required to support student learning; and how user-friendly the materials are (e.g., how easily can the teacher differentiate instruction and meet the needs of all students in the class). Given that IACA does not anticipate having middle grades students enrolled in Algebra 1 or Geometry until Year 2 or beyond, we have postponed reviewing instructional materials for those courses until needed.

EnVision Florida Mathematics is designed around problem-based instruction, small-group interaction, and visual learning, with a focus on reasoning and modeling to support deep conceptual understanding as well as knowledge and fluency of math facts and calculation. In the middle grades its emphasis on proportional reasoning, numbers and computation, and algebra and functions builds a pathway to high school algebra. EnVision uses problem-based learning, "3-Act Math" modeling lessons, and interdisciplinary projects to promote understanding and content connections. Three-act math problems begin with a "hook" in act 1 – a video presenting a problem or situation that piques students' interest. In act 2, students brainstorm about the problem, make individual choices, and then develop their own mathematical models to arrive at a solution. In act 3, students compare and explain their models and reach a resolution. Differentiated instruction, strategies for students who needs additional support, including English language learners, and ongoing formative assessment are embedded within the program. The lessons are designed to be easily customizable and include daily review; small-group problem-based activities; and guided and independent paired or small-group practice activities.

Originally developed through a grant by the NY State Education Department under the name EngageNY, Eureka Math is now supported by Great Minds, a non-profit organization based in Washington. D.C. Eureka Math presents mathematical skills and concepts in a sequence reflecting the "story" of mathematics. In the elementary grades the modules tell "A Story of

[20] https://www.edreports.org/compare/results/math-k8

Units," followed by "A Story of Ratios" in middle school (and "A Story of Functions" in high school). The program relies on real world problems to teach students the "why" of mathematics. Math is not done in isolation – students are taught to explain their reasoning in a way that is understandable and logical to others. They are encouraged to work problems out in their heads or on paper, and not to rely on a calculator. Lesson structure is a key component to Eureka in the elementary years. The following are incorporated into every lesson:

- Mathematical Fluency
  - ✓ Activities for each lesson are intentionally organized
  - ✓ Students revisit previously learned material to develop automaticity
  - ✓ Students are guided to anticipate future concepts
- Concept Development
  - ✓ Major portion of instructional time
  - ✓ Deliberate progression of material, from concrete to pictorial to abstract
  - ✓ Strengthen students' understanding of numbers rather than to teach manipulatives.
- Application Problem
  - ✓ Single-step word problems help students understand the meaning of new ideas
  - ✓ Multi-step word problems support and develop instructional concept
- Activity /Problem Set
- Student Debrief
- Exit Tickets
- Homework

Lessons in middle grades do not follow a regular structure; instead, the content or skills being taught inform the type of lesson, including:

- Socratic discussion – Teacher leads students in a conversation to develop a specific concept or proof
- Problem Set – Students and teachers work through examples and complete exercises to develop or reinforce a concept
- Exploration – Independent or small group work on a challenging problem followed by debrief to clarify, expand or develop math knowledge
- Modeling – Students practice all or part of the modeling cycle with real-world or mathematical problems that are ill-defined

Strategies and tools built into the program support teachers in meeting the needs of diverse learners. Examples include scaffolding hints that help teachers support students receiving tiered interventions and embedded videos that demonstrate classroom practices in a way that engages students and allows for repeated viewing. The program itself provides convenient interactivity that includes progressions-based search functionality to permit navigation between standards and related lessons, linking all lessons in a particular standards strand or mathematical progression, and learning trajectory. This functionality also helps teachers identify and remediate gaps in prerequisite knowledge and provide support for students at a variety of levels.

In addition to grade level mathematics courses, our students will be prepared for and encouraged to enroll in selected high school courses (e.g., Algebra I). Students who require supplemental supports or intensive intervention in math will have those supports embedded within their regular math class. If demand warrants, an Intensive Mathematics elective course will be available for students who did not achieve a passing score on the prior year's Mathematics FSA.

Science

Supporting our student-focused project-based learning approach, IACA strives to foster the following characteristics of scientific literacy:

- Familiarity with the natural world, its diversity, and its interdependence
- Understanding the disciplinary core ideas and the cross-cutting concepts of science, such as patterns; cause and effect; scale, proportion, and quantity; systems and system models; energy and matter; flows, cycles, and conservation; structure and function; and stability and change
- Knowing that science and engineering, technology, and mathematics are interdependent human enterprises and, as such, have implied strengths and limitations
- Ability to reason scientifically
- Using scientific knowledge practices for personal and social purposes[21]

The Next Generation Sunshine State Standards (NGSSS) for Science and the LAFS for Literacy in Science and Technical Subjects in middle school grades will form the foundation for science units of study. Florida's science standards are grouped into five Bodies of Knowledge, each incorporating four or more Big Ideas that provide a framework of essential science concepts content-specific benchmarks. The Bodies of Knowledge and associated Big Ideas are as follows:

- Nature of Science
  - ✓ The Practice of Science
  - ✓ The Characteristics of Scientific Knowledge
  - ✓ The Role of Theories, Laws, Hypotheses, and Models
- Earth and Space Science
  - ✓ Science and Society (reserved for upper grades)
  - ✓ Earth in Space and Time
  - ✓ Earth Structures
  - ✓ Earth Systems and Patterns
- Physical Science
  - ✓ Properties of Matter
  - ✓ Changes in Matter
  - ✓ Forms of Energy (for upper grades – "Energy")
  - ✓ Energy Transfer and Transformations
  - ✓ Motion of Objects
  - ✓ Forces and Changes in Motion
- Life Science
  - ✓ Organization and Development of Living Organisms
  - ✓ Diversity and Evolution of Living Organisms
  - ✓ Heredity and Reproduction
  - ✓ Interdependence
  - ✓ Matter and Energy Transformations (reserved for upper grades)
- Computer Science
  - ✓ Personal, Community, Global, and Ethical Impact
  - ✓ Communication and Collaboration
  - ✓ Communication Systems and Computing

[21] https://www.fossweb.com/program-goals. National Research Council – Framework for K–12 Science Education

- ✓ Computer Practices and Programming

To support our students in becoming lifelong learners and problem solvers, we will strive to establish a community of scientific inquiry in the classroom. Our PBL model enables students to collaborate in planning, implementing, and processing information as they experience trial and error in their projects. We will integrate the 5E Instructional Model for Science[22] into our projects to provide a structured and coherent framework for teachers and students alike.

BSCS 5E Instructional Model

Phase	Summary
Engagement	The teacher or a curriculum task accesses the learners' prior knowledge and helps them become engaged in a new concept through the use of short activities that promote curiosity and elicit prior knowledge. The activity should make connections between past and present learning experiences, expose prior conceptions, and organize students' thinking toward the learning outcomes of current activities.
Exploration	Exploration experiences provide students with a common base of activities within which current concepts (i.e., misconceptions), processes, and skills are identified and conceptual change is facilitated. Learners may complete lab activities that help them use prior knowledge to generate new ideas, explore questions and possibilities, and design and conduct a preliminary investigation.
Explanation	The explanation phase focuses students' attention on a particular aspect of their engagement and exploration experiences and provides opportunities to demonstrate their conceptual understanding, process skills, or behaviors. This phase also provides opportunities for teachers to directly introduce a concept, process, or skill. Learners explain their understanding of the concept. An explanation from the teacher or the curriculum may guide them toward a deeper understanding, which is a critical part of this phase.
Elaboration	Teachers challenge and extend students' conceptual understanding and skills. Through new experiences, the students develop deeper and broader understanding, more information, and adequate skills. Students apply their understanding of the concept by conducting additional activities.
Evaluation	The evaluation phase encourages students to assess their understanding and abilities and provides opportunities for teachers to evaluate student progress toward achieving the educational objectives.

Students will have opportunities to develop deep understanding and engage in rich, thoughtful interactions with other points of view. Science labs are conducted in small groups, with each member contributing to management, data collection, data analysis, and reporting of results. Student observations and ideas are incorporated into group decisions. This type of learning is particularly valuable for students with learning differences (e.g., students with disabilities; English language learners) as it expands opportunities for practice and concept development.

Cross-disciplinary connections (e.g., the impact of scientific discoveries on environmental and social policies) will be incorporated into lessons and projects whenever applicable. Instruction includes the safe storage guidelines and the need for safety and appropriate safety measures, protocols, and procedures for the science classroom and lab setting. All labs will be conducted in a safe environment (e.g. with access to eyewash and use of goggles for teachers and students).

[22] https://bscs.org/bscs-5e-instructional-model.

Science – Kindergarten through Grade Five

Young students will learn about the scientific process by carrying out simple experiments and will learn scientific theories and concepts through texts that encourage an active, hands-on approach to science. As a school focused on the whole child and physical health and well-being, we strive to teach our students to assume personal responsibility for their interaction with the environment, encouraging them to lessen their impact on the natural world through sustainability and conservation measures. For the youngest students, that may translate into simple tasks like collecting litter, recycling or reusing materials.

Scientific inquiry provides a solid launching point for project-based learning. As upper elementary students develop strong critical thinking and problem-solving skills, they will be encouraged to ask complex questions about the natural environment and to set about finding answers. Student-focused, inquiry-based science projects are interdisciplinary, based on hands-on research and experimentation and involve discovery and reporting of findings. Because projects are collaborative in nature, students learn the interpersonal and communication skills that come with debating about and negotiating a hypothesis, deciding how to run the experiment and assigning tasks, and deciphering the best way to relay the findings to the larger community.

We are currently considering *Discovery Education Science Techbook (Florida)* (Discovery Communication, LLC), which is included in FLDOE's most recent state adoption list, for kindergarten through grade five. The materials are designed for a PBL model and align very well with IACA's program as well as the Florida Standards for Science. More significantly, they are very highly rated by FLDOE's expert reviewers on their attention to learner differences (including students with disabilities and ELL students) and universal designs for learning (UDL). Lastly, extensive formative and summative assessment is embedded throughout.

Science – Grades Six through Eight

As students progress from elementary to middle grades, their experiences with PBL become more sophisticated. They incorporate principles learned in math and language arts to create a plan for scientific inquiry and to compute and report scientific findings. Investigations evolve from questions and issues that resonate with students, such as current events or environmental problems. In addition to increasing knowledge of science, PBL allows students to hone their interpersonal, written communication, negotiation, and debating skills. Students use small- and whole-group discussions to engage in peer review, posing alternative scientific explanations and discussing sources of experimental error. They use labeled drawings, writings, and concept mapping to develop and support scientific explanations. Teachers assist students in evaluating their own explanations, as well as explanations offered by scientists.

Students in the middle grades will begin to understand the implications new scientific ideas and the importance of scientific responsibility. Teachers and guest speakers, including community members, promote discussion about the increasingly international context of scientific activity, its impact and limitations, and the continuous evolution of scientific knowledge. Instruction will focus on critical thinking skills and require students to make comparisons, draw analogies, apply knowledge to the given data, and apply scientific analysis. Students will be asked to take positions on issues, support their conclusions and look at issues from multiple perspectives. Through active engagement, they will understand the role of scientists in society as they address matters of public concern and appreciate the role of technology in solving scientific problems.

In addition to the Big Ideas, science instruction in middle grades will include the required topics of human growth and development; substance abuse education; sexually transmitted diseases; and teen dating violence and abuse prevention. Middle grades science will include regular and advanced courses in physical science (grade six), life science (grade seven), and earth science (grade eight). If demand warrants, Biology 1 for high school credit may be offered. We are currently considering continuing with *Discovery Education Science Techbook (Florida)* for the middle grades or using *HMH Science Florida* materials. Both are on FLDOE's current state adoption list and are designed to support PBL.

Social Studies

Social studies teaches students about the world around them. It begins to answer the who, what, where, when, how and why questions that appear in early childhood and, if nurtured, turn into a love of inquiry and learning. Early learners encounter their first hands-on lessons in social studies when they learn how the classroom operates and their role in the learning process. As they begin to take an active role in their learning, they gain a sense of purpose and independence. The interpersonal relationships fostered in a student-centered classroom that allows for collaborative work teaches students about being part of a larger community.

This "neighborhood" approach to elementary social studies instruction has long been the norm. However, in a 2017 position paper the National Council for the Social Studies state:[23]

> *The "expanding communities" curriculum model of self, family, community, state, and nation is insufficient for today's young learners. Elementary social studies should include civic engagement, as well as knowledge from the core content areas of civics, economics, geography, and history. Skills that enhance critical thinking, socio-emotional development, prosocial skills, interpersonal interactions, and information literacy are more meaningful and useful when developed within the context of social studies. The infusion of technology into elementary social studies also prepares students as active and responsible citizens in the twenty-first century.*

In addition to a missed opportunity for appropriately high quality, content-rich social studies instruction, they note a steady decrease in the amount of instructional time devoted to social studies. Specifically, they cite a report by the Center of Education Policy indicating that:

> *[S]ince the enactment of the "No Child Left Behind" federal education policy (NCLB), 44 percent of districts surveyed have reduced time for social studies. That percentage rose to 51 percent in districts with "failing schools." Denying students opportunities to build social studies vocabulary and background knowledge by engaging in social studies activities can lead to lower literacy levels and, ironically, increase the achievement gap.*

Social studies is integrative by nature. When students engage in problem-solving through PBL, they encounter problems and questions based in civics, economics, geography, and history. With teacher guidance, students will actively engage with the processes and concepts of social studies while simultaneously exploring other content areas. Through our use of PBL, IACA students begin to see learning as interdisciplinary and understand the real-world application of principles learned in the classroom. They see their roles not only within the class and school, but also within their neighborhood, the larger community, Florida, the country, and, finally, the world.

[23] National Council for the Social Studies. (2017) *Powerful, Purposeful Pedagogy in Elementary School Social Studies.* https://www.socialstudies.org/positions/powerfulandpurposeful

The Next Generation Sunshine State Standards (NGSSS) for Social Studies (SS) and the LAFS for Literacy in History/SS (as revised) will form the foundation for the development of social studies units of study. The domains of social studies standards covered in elementary and middle grades, by year, are provided in the following table.

Grade(s)	American History	Civics and Government	Economics	Geography	Financial Literacy	World History	LAFS History/SS
K-3	✓	✓	✓	✓			
4	✓	✓	✓	✓	✓		
5	✓	✓	✓	✓			
6		✓	✓	✓		✓	✓
7		✓	✓	✓			✓
8	✓	✓	✓	✓	✓		✓

Source: https://www.cpalms.org/Public/

SS – Kindergarten through Grade Five

IACA is committed to offering an interdisciplinary, active, inquiry-based social studies curriculum that engages students and allows them to interact with newly acquired knowledge. We will be seeking a program that incorporates the following to meet the needs of our student-centered project-based program:

- Engages students in discussion
- Uses a multimedia approach to spark student interest
- Blends literacy instruction and social studies content
- Offers a digital component to integrate technology into academics
- Provides hands-on activities so students can learn by doing
- Takes an interdisciplinary approach that allows students to discuss, write, and apply what they are learning
- Supports the use of primary source documents as instructional materials

At this time, we are considering the state-adopted *Networks Social Studies Florida* (McGraw-Hill) instructional materials based on their alignment with the criteria listed above.

SS – Grades Six through Eight

In our quest to prepare students to become independent, creative and compassionate lifelong learners, leaders and problem solvers, the influence of social studies on the curriculum cannot be underestimated. To understand the impact humans have on the natural environment and ourselves, students must understand the social and political environment as well as history, geography, economics, and civics.

The middle grades social studies curriculum will aid students in forming a strong sense of community, provide the knowledge and skills needed to understand current political and social issues, and prepare students to participate intelligently in public affairs. Lessons will be designed to teach students to effectively analyze historical evidence, use sources effectively, detect potential bias in resources due to cultural influences, and argue empathetically.

Middle grades social studies courses will be drawn from the FLDOE-approved list of courses, and include World History in grade six, Civics in grade seven, and United States History in grade eight. Instruction will be heavily supported through the use of primary source documents and authentic texts reflective of the time or circumstance being studied. We are considering the

FLDOE-adopted *Active Classroom* materials (Nystrom Education/Social Studies School Service) for the three courses. Active Classroom is an inquiry-based program based on a flexible online platform. The content is mapped to Florida's standards, and there are extensive opportunities for customization (e.g., type of assessment; reading lexiles; lesson/media format), making the content accessible to a wide range of learners. As alternatives, we are considering *We the People, Level 2* (Center for Civic Education) for Civics and online resources such as the Stanford Education Group's *Reading Like An Historian* and *Beyond the Bubble* websites for U.S. History.

Instructional Strategies

IACA has chosen both curriculum and delivery methods to meet or exceed Florida's standards in all core academic areas. In addition to being aligned to the LAFS, MAFS, and the NGSSS for all other subjects, our curricular choices support a student-led, interdisciplinary, inquiry-based learning environment. The curriculum is developmentally appropriate and, coupled with carefully selected instructional materials and strategies, provides a whole-child educational program that meets the academic, social/emotional, and physical needs of all students.

Teachers and administrators serve as educational guides and facilitators as they strive to build meaningful, productive relationships with every student they serve. Learning is collaborative, modeling respect for each individual's ideas and building interpersonal communications skills. The following instructional strategies accommodate a wide variety of learning styles and needs:

- Student-centered – Each student is a unique learner with a specific learning style and learning needs. Students need to move through curriculum and standards at a pace that makes sense for their learning needs and leads them through small successes to mastery. We want students to engage with material that inspires them to learn, builds their confidence and helps them understand the subject area content most effectively.
- Inquiry-based – As students work as active learners, they become invested in their own learning process. They follow their natural curiosity, exploring connections and probing the curriculum and instructional materials for further knowledge independent of or facilitated by the teacher.
- Interdisciplinary – Applying content and concepts across disciplines helps students develop critical thinking skills and make connections that have deeper meaning and are more easily retained.
- Cooperative/Collaborative – Teachers will guide small heterogeneous groups to increase communication and team-building skills. While children are naturally inquisitive problem solvers, we also understand that the skills needed for effective collaboration and group work must be explicitly taught and modeled in the same as academic skills are.

Differentiation

Almost by definition, PBL is designed to meet the instructional and developmental needs of the widest range of students. Hands-on projects can provide students who may sometimes feel left out with the chance to show their strengths and feel included in the classroom. Projects are effective for ELLs because the reading and writing is purposeful and connected to personally meaningful experiences. ELL students also benefit from the peer interaction that a project involves. For students with disabilities, teachers can use the same support strategies during a project as they would use in other instructional situations. Since a project involves working in small groups, it gives teachers more time and opportunities to meet individual student needs.

In addition to lesson-specific techniques such as graphic organizers and mnemonics, overarching approaches for ensuring our students' learning is maximized include differentiation; scaffolding; and multi-sensory instruction. Tiered instruction techniques allow adjustments such as the following in lessons or projects to maximize participation and learning for individual students:

- Level of complexity
- Amount of structure
- Materials provided
- Time allowed
- Level of independence
- Pacing
- Number of steps required for completion
- Form of expression/demonstration of mastery

Teachers will receive professional development and technical assistance on ways to differentiate instruction, and implementation will be assessed during principal walkthroughs and formal and informal observations. Examples of differentiation that will be in evidence at IACA include:[24]

- Content – Some students may be completely unfamiliar with the concepts in a lesson, some students may have partial mastery, and some students may already be familiar with the content before the lesson begins. Differentiating content is based on Bloom's Taxonomy and moves from lower to higher levels: remembering, understanding, applying, analyzing, evaluating, and creating. Examples include:
  - ✓ Match vocabulary words to definitions
  - ✓ Read a passage of text and answer related questions
  - ✓ Think of a character's situation in the story and propose a different outcome
  - ✓ Differentiate fact from opinion in the story
  - ✓ Identify an author's position and provide evidence to support this viewpoint
  - ✓ Create a PowerPoint presentation summarizing the lesson
- Process – Students have preferred learning styles, and successful differentiation takes this into account: visual, auditory, kinesthetic, through words. Examples include:
  - ✓ Provide textbooks for visual and text learners
  - ✓ Allow auditory learners to listen to audio books
  - ✓ Allow kinesthetic learners to complete an interactive assignment online
- Product – At the end of a lesson or project, a product is created to demonstrate mastery of content. Students complete activities that show mastery of an educational concept in a way they prefer, based on learning style. Examples include:
  - ✓ Text learners most comfortable with reading and writing write a book report
  - ✓ Visual learners create a graphic organizer of a story
  - ✓ Auditory learners give an oral report
  - ✓ Kinesthetic learners build a diorama illustrating the story
- Learning Environment – Conditions for optimal learning include both physical and psychological elements. Flexible classroom layouts incorporate various types of furniture

[24] Adapted from Concordia University (https://education.cu-portland.edu/blog/classroom-resources/examples-of-differentiated-instruction/)

and arrangements to support individual and group work. Teachers also will use classroom management techniques that support a safe and supportive learning environment.

Support for Students Performing Below Grade Level

All students at IACA will be engaged in and benefit from the curriculum, including students with disabilities, English language learners, and students who enter the school below grade level. In addition to providing the specific services documented on a student's IEP, Section 504 plan, or ELL plan, teachers will differentiate instruction as appropriate for any student performing below grade level. Teachers in all classes will utilize scaffolding to provide contextual supports for meaning through the use of simplified language, teacher modeling, visuals and graphics, and cooperative and hands-on learning. Then, as students become more proficient, the scaffold will gradually be removed. The objective is to maintain the rigorous curriculum designed for each grade while adjusting methods and practices to ensure all students are achieving at grade level.

Student performance will be continually assessed and analyzed by the multi-tiered system of supports (MTSS) leadership team as described below, and student-specific problem-solving teams (PSTs) when applicable. Students not making adequate progress towards the Florida Standards will be identified and the following measures will be implemented:

- Daily intervention or tutoring may be required for those students consistently demonstrating non-mastery.
- Any student not meeting standards will be placed on an intervention and progress monitoring plan (PMP) (unless the student already has an IEP), and specific strategies to remediate and learning deficiencies will be implemented.
- Students consistently demonstrating non-mastery of benchmarks on teacher generated quizzes, chapter tests, projects, and poor academic progress will be targeted for supplemental and intensive instruction/intervention.
- Reading strategies in the content areas will be provided to students in addition to those taught during reading and language arts classes.

As described previously, IACA's whole child approach, PBL model, attention to social and emotional development, and the specific instructional resources to be used are designed to create an atmosphere of learning where all students' needs are met. The curriculum, activities, and supplements lend themselves to the differentiation of teaching within the classroom. Students who enter IACA below grade level will be nurtured in an atmosphere of academic rigor where a teacher meets them at their academic level and creates structures for them to grow.

Multi-Tiered System of Supports

A multi-tiered system of supports refers to the systematic use of multi-source assessment data to most efficiently allocate resources in order to improve learning for all students through integrated academic and behavioral supports. The MTSS implemented by IACA is based on the following core beliefs:

- Every student learns and achieves to high standards.
- Learning includes academic and social competencies.
- Every member of the education community continues to grow, learn, and reflect.
- Every leader at every level is responsible for every student.

Our MTSS framework is focused on schoolwide performance and improvement and is designed to address the academic and behavioral needs of every student, regardless of whether he or she is struggling and in need of intensive remediation and support, or excelling, and in need of advanced learning opportunities. The MTSS leadership team will include the principal, grade level and subject area lead teachers, school counselor(s), and other school-based staff with specialized areas of focus (e.g., curriculum specialist). This team will be responsible for monitoring school-wide instructional goals and developing action plans to correct deficiencies both in instruction and student learning. The team will meet monthly to:

- Evaluate data and correlate to instructional decisions
- Review progress-monitoring data at the grade level and classroom level to identify potential concerns as well as positive practices
- Identify professional development to enhance student achievement levels
- Facilitate the process of building consensus, increasing infrastructure, and otherwise support the school's MTSS framework

In addition, the MTSS team will establish a cyclical schedule for in-depth review and analysis of school, classroom, and student data that aligns with the collection of benchmarking and summative data. The team will refer to the FLDOE's Guiding Tools for Instructional Problem Solving – Revised (GTIPS-R) "Imperative Questions" for each tier to frame data analysis. The results of these data reviews will inform curricular decisions as well as identify professional development, training, and supports needed by teachers. Instances of inadequate progress will be analyzed to determine first whether the curriculum and instructional materials are being implemented with fidelity. If not, the team will work with the teacher(s) to identify what needs to occur to resolve the problem. If so, revisions to the materials will be considered.

Tier 1 – Core Instruction and Universal Supports

Tier 1 focuses on the implementation of the school's core academic curriculum (aligned with the Florida Standards) and the school's social and emotional curriculum (aligned with the CASEL core competencies). In the event Florida adopts SEL standards for kindergarten through grade eight, IACA will ensure its social and emotional instruction addresses those standards.

The type and amount of instruction required varies based on the students enrolled in the school. The student population in one school may require more or less time than students in another as a result of different prerequisite skills, background knowledge, language barriers, or other factors. Generally, a school's core curriculum is considered effective if approximately 80 percent or more of students achieve proficiency from core instruction alone. If not, implementation fidelity will be assessed and consideration given to revising the instructional materials. Examples of questions the MTSS team will consider with regard to core instruction include:

- What percent of students are meeting grade level expectations and/or are "on-track" for promotion?
- Is Tier 1 instruction for each grade level subject area effective? Are approximately 80 percent or more of the students proficient or making significant growth?
- How effective have improvement strategies been at increasing the growth of **all** students, including students who struggle to reach proficiency and those who excel?
- Which students demonstrate significant gaps in performance on Tier 1 assessments when compared to grade level expectations of performance for a given point in time?

- What is the relationship between Tier 1 formative classroom assessments or benchmark assessments and performance on summative measures (e.g., FSA, end-of-course exams)?

Tier 2 – Supplemental Instruction/Intervention and Supports

Tier 2 supports are more focused, targeted instruction/intervention provided to small groups of students in addition to and aligned with the core instruction provided in Tier 1. Tier 2 interventions are based on data revealing that some students or student groups need more than the core universal instruction. Both interventions and progress monitoring are targeted to specific skills to remediate or enrich, as appropriate. Progress monitoring occurs more frequently than in Tier 1 to ensure that the interventions are effective. A member of the MTSS team or designee (e.g., classroom teacher) will communicate with parents to keep them informed of supplemental supports or interventions their child is receiving and the results of those supports. Examples of Tier 2 questions regarding supplemental interventions and supports include:

- Which students require supplemental instruction or practice based on an analysis of their current needs in relation to Tier 1 standards of performance?
- How should students receiving supplemental instruction be grouped together for small group instruction (e.g., based on skill/content/subject area of need)?
- Which students will be provided with a standard protocol approach to address common and recurring concerns for which there are ample evidence-based options for intervention/instruction?
- Which students will need modified interventions or more in-depth problem solving (particularly problem analysis) in order to ensure an appropriate match between the instruction/service supports and the students' needs?
- Which students are demonstrating a positive response to the supplemental instruction/ intervention being provided to them? Which are demonstrating moderate to poor responses to instruction/intervention? What is our evidence of intervention fidelity for those not progressing?
- Do the majority of students within a given supplemental instructional group demonstrate a positive response to the instruction (i.e., is Tier 2 really effective)?
- What modifications are needed to increase positive student responses to instruction/ intervention at Tier 2?
- Which students may need more intensive services? Which students may be ready to either address other areas of need or transition back to receiving Tier 1 instruction only?
- Do students who demonstrate progress at Tier 2 based on progress monitoring data also demonstrate progress on their Tier 1 assessments? If not, why not?

Tier 3 – Intensive, Individualized Intervention and Support

Tier 3 interventions, provided in addition to Tier 1 core instruction and Tier 2 supplemental supports, are targeted, highly intensive, and tailored to individual student needs. Parents will have opportunities to be involved in the process and provide input (e.g., participate in team meetings or individual conferences). Students who receive these services may be several grade levels behind (or ahead). Progress monitoring occurs very frequently for students at this level, as it is imperative that the interventions are sufficiently effective to close achievement gaps. If more

than approximately five percent of students are receiving Tier 3 interventions, fidelity of implementation for Tiers 1 and 2 will be assessed and revision to the program will be considered.

Problem Solving Team

Student-centered problem-solving teams (PSTs) will implement a four-step process to match instructional resources to educational need. While the MTSS leadership team utilizes this process to monitor and evaluate the school's performance at a group level, PSTs will be established for individual students who do not make adequate progress, even with Tier 2 supports. Core members of the PST will be determined prior to the opening of school, but each team will include the student's teacher or teachers for the subjects where the problem is occurring (e.g., math teacher for math deficits; multiple teachers for behavioral challenges). Parents will be encouraged to be involved with the PST, either through face-to-face meetings or phone calls. They will be invited to participate in decisions regarding interventions and will be provided copies of progress monitoring reports, including visual/graphical representations. Parents also will be provided information on ways to support their child's progress at home. The student's PST will engage in a problem-solving cycle as follows:

- **Step 1 –** Define the problem or goal by determining the difference between what is expected and what is occurring. Ask, "What specifically do we want the student to know and be able to do when compared to what he or she knows and is able to do?" The goal is to define the specific diagnosed academic or behavioral need(s) to be remediated.
- **Step 2 –** Analyze the problem using data to determine why the issue is occurring. Generate hypotheses to explain why the student is not meeting performance goals. Ask, "Why is the desired goal not occurring? What are the barriers to the student doing and knowing what is expected?" Consider evidence-based content area knowledge, alterable variables, and instructionally relevant domains. Gather assessment data to determine whether or not the hypotheses are valid, then design or select interventions to directly address the root causes of the student's difficulties.
- **Step 3 –** Develop and implement a progress monitoring plan (PMP) driven by the results of the team's problem analysis. Specify exactly what the intervention is; who is responsible for implementing it; when, where, and how often it will be implemented; the data that will be used to measure progress; who will measure it, and how often; and the decision rule for determining if the plan is effective. The plan should also include fidelity and support components to ensure the implementer has the skills and resources necessary to implement the intervention as intended and follows through in all aspects.
- **Step 4 –** Measure the student's response to intervention (RtI) by using data gathered from progress monitoring at agreed upon intervals. Evaluate the effectiveness of the intervention plan based on the student's or group of students' response to the intervention. Progress-monitoring data should directly reflect the targeted skill(s). Ask, "Is it working? If not, how will the progress monitoring intervention plan be adjusted to better support the student's or group of students' progress?"

Questions considered by the PST when developing and implementing interventions may include:

- Is the intervention plan(s) appropriately matched to this student?
- Did our problem-solving address the "whole student" by considering the potential interaction between academic and behavioral needs?

- If the student is demonstrating a positive response to the intervention(s), then is the student also demonstrating improvements in Tier 1 assessment performance? If not, why not? What next goals/needs should be targeted? Does the student need Tier 3 services anymore? Tier 2?
- If the student is not progressing, is fidelity a concern?
- Does the student's RtI data indicate the interventions are effective but require a level of intensity and resources to sustain growth or performance that is beyond that which is accessible through the school's general education resources?
- Does the student's RtI data indicate the student does not make adequate growth given effective core instruction and intensive, evidence-based interventions?

If the team responds affirmatively to either of the last two questions, this is an indication that the student should be referred for an evaluation to determine if the student has a disability and needs exceptional education services (see Section 6). Concerns are not limited to academic areas; they may include social or emotional factors as well.

In addition, pursuant to s. 1008.25(4), F.S., each student who does not achieve a level 3 or above on the FSA ELA, FSA Mathematics, or Algebra 1 EOC during the prior year will be evaluated to determine the nature of the student's difficulty, the areas of academic need, and strategies for providing academic supports to improve the student's performance. The results of the diagnostic review will be used to develop and implement a progress monitoring plan. Depending on the nature and extent of a student's need, the MTSS leadership team or the PST in consultation with the parents will be the entity responsible for developing the PMP. If a student already has an IEP as a student with a disability, that plan may be used in lieu of the PMP.

B. If the curriculum is fully developed, summarize curricular choices (e.g. textbooks) by core subject and the rationale for each. Include as Attachment C, a sample course scope and sequence for each core subject for each division (elementary, middle, and high school) the school would serve.

If the curriculum is not yet fully developed, describe any curricular choices made to date and proposed curricular choices (e.g. textbooks, etc.) and explain the plan for how the curriculum will be completed between approval of the application and the opening of the school. This should include a timeline, milestones, and individuals responsible for included tasks. Also, describe the focus of the curriculum plan and explain how the curriculum will be implemented. Include what core subject areas will be offered and provide evidence on how the curriculum will be aligned to Florida standards.

Provide evidence that reading is a primary focus of the school and that there is a research-based curriculum and set of strategies for students who are reading at grade level or higher and, independently, a curriculum and strategy for students reading below grade level. Include the school's reading curriculum as Attach. D.

Curricular Choices Thus Far

The school's curriculum is not yet fully developed. We know that instructional materials are one component of curriculum but, as noted above, the Florida Standards in ELA and mathematics are under revision. It is not known how significant the changes will be or what impact they will have

on instructional materials. That said, instructional materials for core content areas that are under consideration are described in prompt A above.

Curriculum Development

IACA understands the critical nature of ensuring that each teacher has a comprehensive plan for instruction that clearly identifies the standards to be covered. Instructional staff and the school's administrator will develop a school-wide curriculum map to ensure that all Florida standards are addressed and mastered in each core subject. Milestones in the curriculum development process to be achieved between the approval of the application and the opening of the school are provided in the table below.

	Action	Responsible	Timeline
1	Develop "classroom" guides for each core subject area. Each classroom guide should reflect the content to be covered within a given classroom	Principal	Spring/Summer 2022
2	Finalize decisions regarding the core and supplemental instructional intervention materials to be purchased	Principal	Spring 2022
3	Research potential topics or prompts to support initial implementation of project-based learning and whole child education; gather resources and recommendations to support teachers	Principal	Spring/Summer 2022
4	Develop the school-wide curriculum plan for Quarter 1, to include sample lessons	Principal Teachers	Summer 2022
5	Review/debrief on curriculum implemented during Quarter 1, including analysis of student performance on baseline and interim/benchmark assessments; incorporate results of the review into the development of Quarter 2 curriculum map	Principal Teachers	October 2022
6	Review/debrief on curriculum implemented during Quarter 2; incorporate the results of the review into the development of Quarter 3 and Quarter 4 curriculum maps	Principal Teachers	January 2023
7	Develop individual lesson plans	Teachers	Ongoing
8	Review/update/refine curriculum plan	Principal Teachers	Annually, beginning Summer 2022

Reading as a Primary Focus

Reading is a critical component of the Florida education system and, as such, is a primary focus the school. Our 120-minute literacy block allows for 90 minutes of uninterrupted instruction in reading and writing using Core Knowledge Language Arts, with additional opportunities for reading instruction in the content areas, independent reading, listening to advanced text read aloud, and reading intervention/enrichment are incorporated throughout the day.

The principal or designee (i.e., reading/curriculum coach once enrollment warrants) will analyze progress monitoring data with teachers during grade level meetings. Data-based decision making will ensure all instructional materials, reading programs, and strategies are scientifically-based, including core, supplemental, intensive, and accelerated programs. Teachers and administrators will be provided instruction in the use of screening, diagnostic, and classroom-based progress monitoring assessments, as well as other procedures that effectively identify students who may be at risk of reading failure or who are experiencing reading difficulties.

Reading Curriculum

The reading curriculum is described in more detail in Attachment D.

C. If the school will adopt or develop additional academic standards beyond those mandated by the state, explain the types of standards (e.g., content areas, grade levels). Describe the adoption or development process. Select one grade level and subject area as an example and explain how these additional standards exceed required standards and contribute to meeting the mission of the school.

The school will not adopt or develop additional academic standards,

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

The research base for the curriculum mirrors the research base for the educational design included in Section 3. Additionally, the specific instructional materials that are proposed are on the state's adopted list and are evidence-based and supported by research.

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

Physical Education and Health

As part of the schoolwide focus on the development of the whole child, health and physical education (PE) play an important role in the school's curriculum. While students will have the opportunity to move and explore during many of their core academic classes, the physical education program seeks to develop an appreciation for sports from the standpoint of a spectator and a reader of sports publications as well as a participant. Health and safety competencies will focus on teaching students to develop healthy habits that promote good health and contribute to overall physical and psychological well-being.

The PE program will be standards based, balanced, and progressive, involving moderate to vigorous physical activity. Pursuant to s. 1003.455, F.S., students in elementary grades will receive 150 minutes of PE per week and students in middle grades will take one semester of PE each year. Courses will be drawn from the FLDOE Course Code Directory. The PE requirement will be waived for a student who meets one of the following criteria:

- The student is enrolled or required to enroll in a remedial course
- The parent requests in writing that the student enroll in another course from among those course offered as options by the school, such as music, world language, etc...
- The parent submits in writing that the student is participating in physical activities outside the school day that are equal to or in excess of the mandate requirement (e.g., afterschool sports, dance classes, physical activity as part of an after-school program)

Health instruction will be integrated throughout the curriculum for students in kindergarten through grade five. Health will be a semester course for students in grades six through eight.

Mental and Emotional Health Education (6-8)

In addition to social and emotional learning embedded throughout the school program and explicitly addressed through Compass Circles, IACA will adhere to the requirements of Rule 6A-1.094121, F.A.C., requiring a minimum of five hours of instruction annually for middle grades students related to mental health awareness and assistance, including suicide prevention and the impact of substance abuse. Among other topics, instruction will include:

- Awareness of signs and symptoms;

- Process for getting or seeking help for themselves or others
- Awareness of resources (i.e., Fortify Florida app and the National Suicide Prevention Hotline (1-800-273-8255)
- What to do or say to peers struggling with mental health disorders

It is anticipated that this content will be taught in the Health class, but a final decision will be made by the principal once hired.

Social and Emotional Competencies

As described in Section 3, a key component of the school is its focus on social and emotional learning and development for both students and staff. At this time, Florida has SEL standards for birth through kindergarten only. In the event standards are developed and adopted for school age students, IACA will ensure they are integrated into the school's SEL program.

Our comprehensive approach is based on selected components of the Valor Compass program in conjunction with a comprehensive SEL curriculum. The two curricula under consideration – Sanford Harmony and Caring School Community – are described in Section 3. Both programs align with the Collaborative for Academic, Social, and Emotional Learning's core SEL competencies and the Compass model; include strategies for engaging caregivers and strengthening the school community as a whole; and include tools to assess program implementation and effectiveness. The five CASEL core competencies described below will serve as standards for instruction and student development in our SEL program:

- Self-Awareness – The ability to recognize one's own emotions, thoughts, and values and how they influence behavior. The ability to accurately assess one's strengths and limitations, with a well-grounded sense of confidence, optimism, and a growth mindset.
  - ✓ Identifying emotions
  - ✓ Accurate self-perception
  - ✓ Recognizing strengths
  - ✓ Self-confidence
  - ✓ Self-efficacy
- Self-Management – The ability to successfully regulate one's emotions, thoughts, and behaviors in different situations — effectively managing stress, controlling impulses, and motivating oneself. The ability to set and work toward personal and academic goals.
  - ✓ Impulse control
  - ✓ Stress management
  - ✓ Self-discipline
  - ✓ Self-motivation
  - ✓ Goal-setting
  - ✓ Organizational skills
- Social Awareness – The ability to take the perspective of and empathize with others, including those from diverse backgrounds and cultures; understand social and ethical norms for behavior; and recognize family, school, and community resources or supports.
  - ✓ Perspective-taking
  - ✓ Empathy
  - ✓ Appreciating diversity
  - ✓ Respect for others
- Relationship Skills – The ability to establish and maintain healthy and rewarding relationships with diverse individuals and groups. The ability to communicate clearly, listen well, cooperate with others, resist inappropriate social pressure, negotiate conflict constructively, and seek and offer help when needed.
  - ✓ Communication
  - ✓ Social engagement
  - ✓ Relationship-building
  - ✓ Teamwork

- Responsible Decision Making – The ability to make constructive choices about personal behavior and social interactions based on ethical standards, safety concerns, and social norms. The realistic evaluation of consequences of various actions, and a consideration of the well-being of oneself and others.
  - ✓ Identifying problems
  - ✓ Analyzing situations
  - ✓ Solving problems
  - ✓ Evaluating
  - ✓ Reflecting
  - ✓ Ethical responsibility

Music

The music curriculum for elementary grades will include both vocal and instrumental music, introducing 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 involved in singing and playing instruments, practice in musical interpretation, and training in creative expression.

The music curriculum for middle grades students will include a stand-alone elective as well as being integrated into history and English/language arts when applicable. Students will explore the essential elements of music in America and global cultures and reflect on the significance of social influences and historical events on the development of music.

Art

Art education in the elementary grades will provide students with an opportunity to develop and explore their creative potentials. The curriculum will include planning, developing, and implementing the fine arts as outlined in the NGSSS. Students will be exposed to production, history, criticism an aesthetics of art.

During the middle school years, students will expand on their art experiences in the elementary grades as they continue to develop and explore their creative potentials. Students will be exposed to the many components of art including production, history, criticism and aesthetics. The interdisciplinary connections between art and core academic subjects will be emphasized throughout the year.

World Language – Spanish

Beginning, Intermediate, and Advanced Spanish will introduce students to the language and its culture. Students will progress from learning beginning skills in listening and speaking and an introduction to basic skills in reading and writing to actively engaging in listening and speaking activities and demonstrating understanding of reading and writing selections on familiar topics.

Spanish 1 for high school credit may be offered in lieu of M/J Spanish Advanced. Students will develop communicative skills in all three modes of communication and cross-cultural understanding. Emphasis is placed on proficient communication in the language. An introduction to reading and writing is also included as well as culture, connections, comparisons, and communities.

Technology

All students must have regular opportunities to use technology to develop skills that encourage personal productivity, creativity, critical thinking, and collaboration in the classroom and in daily life. Students will have instruction and practice in computer skills to ensure they are prepared for and comfortable with computer-based assessments. Technology instruction and use will be based

on the International Society for Technology for Technology in Education (ISTE) standards. There are seven ISTE Standards for Students, each of which has four sub-items:

- Empowered Learner – Students leverage technology to take an active role in choosing, achieving and demonstrating competency in their learning goals, informed by the learning sciences.
- Digital Citizen – Students recognize the rights, responsibilities and opportunities of living, learning and working in an interconnected digital world, and they act and model in ways that are safe, legal and ethical.
- Knowledge Constructor – Students critically curate a variety of resources using digital tools to construct knowledge, produce creative artifacts and make meaningful learning experiences for themselves and others.
- Innovative Designer – Students use a variety of technologies within a design process to identify and solve problems by creating new, useful or imaginative solutions.
- Computational Thinker – Students develop and employ strategies for understanding and solving problems in ways that leverage the power of technological methods to develop and test solutions.
- Creative Communicator – Students communicate clearly and express themselves creatively for a variety of purposes using the platforms, tools, styles, formats and digital media appropriate to their goals.
- Global Collaborator – Students use digital tools to broaden their perspectives and enrich their learning by collaborating with others and working effectively in teams locally and globally.

IACA recognizes and embraces the important role technology plays in today's society. The need for children to be able to use and learn new technology is evident. We believe that technology should neither drive curriculum nor should it be used in place of quality teacher-led instruction. Therefore, instruction in the use of technology (e.g., research, word processing) will be incorporated into lessons and classroom activities when appropriate. Digital tools will be available for student use for instruction, project activities, and assessment as appropriate.

IACA is considering the use of the Curriculum Associates iReady program as an adaptive digital tool to support reading and math instruction. The iReady online program has the capacity to serve as a diagnostic, progress monitoring, and instructional tool. It is our understanding that the iReady reading program is in use in MCPS. If adopted, we hope to collaborate with the district to determine how we can "piggyback" off of any existing district contract as a measure of fiscal responsibility and secure a contractual price consistent with other district schools.

Career and Education Planning (6-8)

In accordance with s. 1003.4156, F.S., students must complete a Career and Education Planning course approved by FLDOE in order to meet middle grades promotion standards. The course must be Internet-based, easy to use, and customizable to each student and include researched-based assessments to assist students in determining educational and career options and goals. The course must emphasize the importance of entrepreneurship skills, technology, or the application of technology in career fields; and must provide information from the Department of Economic Opportunity's economic security report as described in s. 445.07, F.S. As part of the course, students will complete a personalized academic and career plan. The course may be implemented as a one-semester stand-alone course or integrated into designated year-long courses. The list of

approved courses is available at: http://www.fldoe.org/core/fileparse.php/7531/urlt/approved-courses.pdf.. We will review the list annually and identify the course or course(s) most appropriate to meet the needs of our students.

F. Discuss the system and structures the school will implement for students at risk of not meeting academic requirements or of dropping out.

The results of the most recent FSAs or other standardized assessments, teacher-made tests, and screenings used with the various core programs will be analyzed to determine the level of mastery in reading, writing, mathematics, and science for all students. This information, coupled with the results of the students' response to intervention, when applicable, will be used to determine students' needs (e.g., appropriate course selections; referral to the problem-solving team to consider the need for academic or behavioral supports or services; identification of multi-sensory reading instruction and intervention strategies for students who are, or are at risk of being, retained due to reading difficulties; tutoring; referral for evaluation under IDEA or Section 504).

The school's multi-tiered system of supports is described above. One of the responsibilities of the MTSS leadership team will be the implementation of an early warning system (EWS) aligned with s. 1001.42(18), F.S., to identify at-risk students who are likely to experience adverse outcomes. Identification and intervention must occur early enough to alter student trajectories. Although IACA is exempted from the Florida Statutes found in chapters 1000 through 1013 (with some exceptions), we strongly believe an EWS is a critical component of any school program, especially one that include middle school grades. At a minimum, the IACA EWS will include the following triggers:

- Attendance below 90 percent, regardless of whether absence is excused or a result of out-of-school suspension
- One or more suspensions, whether in school or out of school
- Course failure in English Language Arts or mathematics during any grading period.
- A Level 1 score on the statewide, standardized assessments in English language arts or mathematics or, for students in kindergarten through grade 3, a substantial reading deficiency under s. 1008.25(5)(a).
- Prior retentions/over age for grade

In the event a student exhibits two or more early warning indicators (based on a review by the MTSS leadership team of the relevant data), a PS team will convene to determine appropriate intervention strategies for the student. The parent will be an invited member of the team and, as with any other student brought to the attention of a PST, the student's progress will be regularly monitored and data-based decisions will be made regarding the effectiveness of the intervention and the need to intensify or otherwise modify the intervention to resolve the concern.

Along with constant progress monitoring and interventions, the hands-on collaborative educational program and focus on social and emotional learning in concert with academics will allow for ease of differentiation and meeting student's needs at all levels. A range of strategies will provide scaffolded support to students who need it. Then, as the students become more proficient and independent, the scaffold will gradually be removed. Our goal will be to maintain the rigorous curriculum designed for each subject area, but to adjust methods and practices when needed to support all students in achieving grade level standards.

Section 5: Student Performance

Performance Goals

A. Describe the expected incoming baseline of student academic achievement of students who will enroll in the school. Based upon the expected incoming baseline performance, describe the school's goals for academic growth and improvement that students are expected to show each year and the rationale for those goals. Describe how the school's academic goals and objectives for improving student learning will be revised if the actual incoming baseline is substantially different than the expected baseline. Describe how success will be evaluated, and the desired overall results to be attained through instruction.

Baseline

Having no actual student data from which to establish a baseline, we reviewed school grades data from the seven district-operated elementary and three district-operated middle schools closest to our proposed location. Anticipating that the students who enroll in IACA will be reflective of MCPS's surrounding area schools, we estimated baseline levels by calculating average proficiency, learning gains, and middle school acceleration rates of those schools (see Attachment FF). This information was used establish our school performance goals. Once students are enrolled and their records are available, we will retroactively establish baselines based on the students' performance on the prior year's assessments. If the updated baseline levels are higher or significantly lower than anticipated, we will revise our goals accordingly by applying the methodology described below.

Rationale for Annual Goals

In establishing rigorous yet attainable annual performance goals, we reviewed existing state and district accountability plans and the applicable federal and state guidelines used to develop them. Florida's state plan under the federal Every Student Succeeds Act (ESSA) was approved in September 2018. For the performance areas specifically applicable to elementary and middle grades, the plan extends the long term goals already included in the State's strategic plan for an additional five years to achieve the following from the baseline in 2014-15 through 2024-25:

- increase the percentage of students achieving grade-level or above performance by 12 percentage points in English Language Arts (ELA) and mathematics (i.e., on average 1.2 points per year); and
- reduce the achievement gap in ELA and mathematics by one-third between each subgroup (e.g. race/ethnicity; socio-economic status) in each subject area.

A similar model is required by district Comprehensive Research-Based Reading Plans, in which districts are required to match or exceed the following State goals over a five-year period:

- increase FSA-ELA achievement by six percentile points (≈ 1.2 points per year);
- increase the percentage of students making learning gains by seven percentile points ≈ 1.4 points per year); and
- reduce the achievement gap for identified subgroups by at least one-third.

The guidelines described above formed the basis for developing IACA's goal. Since actual achievement gaps for the lowest quartile subgroup is not available, learning gains goals for this subgroup reflect an increase of two points per year to more quickly close the gap.

Academic Achievement and Growth

IACA's proposed academic performance goals, including learning gains goals, and methods of assessment for the first five years are provided in the table below.

Table 5.1 Annual Goals: Proficiency in ELA, Mathematics, Science, and Social Studies

Grade	Measure	Baseline 2018-19	Annual Goal				
			Y1	Y2	Y3	Y4	Y5
ELA – iReady*							
K-2	Achievement	N/A	Percent of students performing on-level or above will meet or exceed the district average				
	At least one year's growth	N/A	100%	100%	100%	100%	100%
ELA – Florida Standards Assessment							
3-5	Achievement ≥ Level 3	54%	55%	56%	58%	59%	60%
	Learning Gains – All Students	56%	57%	59%	60%	62%	63%
	Learning Gains – Lowest Quartile	53%	55%	57%	59%	61%	63%
6-8	Achievement ≥ Level 3	56%	57%	58%	60%	61%	62%
	Learning Gains – All Students	56%	57%	59%	60%	62%	63%
	Learning Gains – Lowest Quartile	46%	48%	50%	52%	54%	56%
Math – iReady*							
K-2	Achievement	N/A	Percent of students performing on-level or above will meet or exceed the district average				
	At least one year's growth	N/A	100%	100%	100%	100%	100%
Math – Florida Standards Assessment							
3-5	Achievement ≥ Level 3	61%	62%	63%	65%	66%	67%
	Learning Gains – All Students	65%	66%	68%	69%	71%	72%
	Learning Gains – Lowest Quartile	51%	53%	55%	57%	59%	61%
6-8	Achievement ≥ Level 3	61%	62%	63%	65%	66%	67%
	Learning Gains – All Students	62%	63%	65%	66%	68%	69%
	Learning Gains – Lowest Quartile	51%	53%	55%	57%	59%	61%
Science – Statewide Science Assessment							
5	Achievement ≥ Level 3	44%	45%	46%	48%	49%	50%
8	Achievement ≥ Level 3	55%	56%	57%	59%	60%	61%
Social Studies – Civics EOC Assessment							
7	Achievement ≥ Level 3	73%	74%	75%	77%	78%	80%

** At this time, we intend to use iReady as our primary formative assessment (and summative for K-2) in alignment with the district. We leave open, however, the possibility that the principal may choose to use a different proven-effective system compatible with the school's educational program (e.g., NWEA Measures of Academic Progress (MAP)).*

Middle School Acceleration

Florida's school grades formula is not limited to assessment results. For middles schools, the percent of students who pass a high school level EOC exam or industry certification also contributes to the school's grade.

Table 5.2 Annual Goals: Middle School Acceleration

Grade	Measure	Baseline 2018-19	Annual Goal				
			Y1	Y2	Y3	Y4	Y5
6-8	Middle School Acceleration	73%	74%	75%	76%	77%	78%

School Grades

In addition to the specific goals above, we intend to earn a school grade of A in the state's accountability system by: (1) ensuring each student makes at least one year's progress for each year of attendance; and (2) closing the achievement gap by providing students who enter the school below grade level with the type and intensity of instruction and intervention they need to achieve more than one year's growth each year.

As an elementary/middle school, IACA's school grade will comprise nine components: percent of students who achieve level 3 or above on the FSA ELA, mathematics, science, and social studies; percent of all students who make learning gains in ELA and mathematics; percent of students in the lowest quartile who make learning gains in ELA and mathematics; and middle school acceleration. The grade is based on a total of 900 possible points: A – ≥ 62 percent of points; B – 54-61 percent of points; C – 41-53 percent of points; D – 32-40 percent of points; and, F – ≤ 31 percent of points. A school's grade is based solely on the components for which it has sufficient data, which requires that at least 10 students are included in the calculation of the component. As a relatively small school, the specific components that will be applicable for IACA during its initial years may be limited.

B. Describe any mission-specific educational goals and targets for the school not captured by state accountability requirements. State goals clearly in terms of the measures or assessments the school plans to use.

IACA will annually evaluate the extent to which the school provides a supportive learning environment and shared sense of community. Students, parents, and staff will be surveyed to determine their satisfaction with regard to learning environment; physical and social environment; and home-school relations. Surveys will solicit opinions regarding the score values of inclusiveness, family involvement, learning through doing, and social responsibility:

- Responses to student and parent survey items regarding implementation of the core values will reveal an upward trend from the school's inaugural year onward.

The combination of project based learning and our SEL curriculum will help our students become knowledgeable and responsible young adults, able to demonstrate leadership in their daily lives by knowing how to listen, express themselves, resolve conflicts, work in teams, value diversity, and set goals. The annual school climate survey will tap characteristics and beliefs that reflect this vision:

- Responses to student and parent survey items regarding the extent to which students know how to listen, express themselves, resolve conflicts, work in teams, value diversity, and set goals will reveal an upward trend from the school's inaugural year onward.
- Annual review of district discipline reports will reveal the rate of in- and out-of-school suspensions is less than the district rate.

Other measures of school success will involve student engagement in the learning process:

- Annual review of district attendance reports will reveal average daily attendance meets or exceeds the district rate.
- Annual review of district attendance reports will reveal the percent of students who experience chronic absenteeism (≥18 days or 10% of instruction) is less than the district rate.

Placement and Progression

C. Describe the school's student grade level and course placement procedures.

Enrollment, grade level, and course placement procedures will be implemented in accordance with the district's Student Progression Plan (SPP). Students with disabilities shall be placed in appropriate courses as dictated by the course of study described within their individual education plan (IEP).

Children who will attain the age of five years on or before September 1st of the school year will be eligible for admission to kindergarten during that school year. Children must attain the age of six years on or before September 1 of the school year for which admission to first grade is sought. No student shall be admitted to the first grade who has not successfully completed kindergarten.

In accordance with the district's SPP, when a student transfers from a public or non-public school, it will be the responsibility of the principal of the previous school to determine grade level placement. The student will be academically screened to determine best placement within IACA, as needed. When a student transfers from a home education program, it will be the responsibility of the principal if designee of the receiving school (i.e., IACA) to assess the student's achievement level. For students transferring into grades six through eight from another state or country, grades will be accepted at face value unless the receiving school determines validation of the official transcript is necessary. Procedures for validation will be followed as described in the SPP.

No student will be assigned to a grade level based solely upon the student's age or other factors that constitute social promotion. For students in elementary grades, promotion will be determined in part by proficiency in English language arts /reading, mathematics, science, and social studies. Proficiency thresholds to be applied for student progression from kindergarten through grade five are found in the SPP. Students who do not demonstrate proficiency will be provided supplemental and/or intensive supports (see Section 4). The primary responsibility for determining each student's performance and ability to function academically, socially, and emotionally in the next grade lies with the classroom teacher in conjunction with the principal. A recommendation for retention can only be made by the school's multi-tiered system of supports (MTSS) team and must be based on multiple data sources.

Students in grades six through eight will be promoted to the next grade level if they failed no more than three core academic courses. Promotion or retention are at the discretion of the principal for students who fail all four core courses or who fail three courses and are non-proficient in reading. However, students will remain in grade eight until they meet the requirements for promotion to high school.

D. State whether the applicant intends to use the local school district's pupil progression plan. If not, explain the policies and standards for promoting students from one grade level to the next or provide the pupil progression plan as Attachment E.

IACA will adopt the MCPS Student Progression Plan.

E. 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.

Not applicable; Ina A. Colen is a K-8 school.

F. Discuss how and when promotion and graduation criteria will be communicated to parents and students.

Parents will be provided with a copy of the MCPS Student Progression Plan, either hard copy or online, at the time of enrollment, and annually thereafter. Student progress will be communicated to parents through interim reports, periodic progress reports, and report cards every nine weeks. Parents will also have access throughout the school year to assignments, grades, and assessments on the school's online student information system.

For students who do not meet state performance levels in core areas on statewide assessments or who demonstrate academic or behavioral challenges that require additional assistance, the school's problem-solving team (PST) will convene to develop and implement an individual progress monitoring plan (PMP) in consultation with the student's parent/guardian that describes the specific data analyzed to identify the student's specific academic challenges. The PMP will clearly outline the instructional strategies and interventions that will be used to address the identified areas of need. The PMP will identify who will be delivering the instruction, the frequency of instruction, and all related progress monitoring and reevaluation activities that will be used. If the student has a disability, the student's individual educational plan (IEP) may serve as the PMP.

Parents will be notified in writing when there is evidence their student is not on track to achieve satisfactory performance, and specifically when their child is identified of having a substantial reading deficiency. They will be invited to participate as a member of the PST charged with developing and implementing an intervention plan. More specifically with regard to substantial reading deficiencies, parents will be informed of the following:

- the specific services being provided to the child, and a description of the proposed supplemental instructional services and supports designed to remediate the identified area(s) of reading;
- the school's process to provide and monitor intensive instruction until grade level proficiency is met;
- that standardized assessment is not the sole factor used to determine promotion;
- that if the child's reading deficiency is not remediated by the end of grade 3, the child must be retained unless he or she meets one of the good cause exemptions;
- strategies, including multisensory strategies, through a read-at-home plan the parent can use in helping his or her child succeed in reading;
- the district's specific criteria and polices for using a portfolio to demonstrate the student's mastery of ELA standards in grade 3;
- the parent's rights related to requesting evidence for a portfolio be collected; and
- the district's criteria related to mid-year promotion of students.

School personnel will use all available resources to achieve parent understanding and cooperation regarding a student's remediation, progress monitoring plan, and retention. All retention decisions will be made at the end of the school year, and documentation of the decision will be provided to the parents in writing.

Planning for graduation cannot wait until a student is beginning high school. Parents of rising grade six students will be made aware of all course requirements for middle school as it pertains to their child's successful completion of middle grades and their subsequent matriculation to

high school. In addition to the SPP, this communication will be made through parent-teacher conferences, including IEP and other student problem-solving meetings; informational meetings conducted by student support staff and guidance staff; and flyers and/or newsletters.

Assessment and Evaluation

G. In addition to all mandatory assessments, identify the primary interim assessments the school will use to assess student learning needs and progress throughout the year (including baseline assessments) including a proposed assessment schedule as Attachment F. Provide the rationale for selecting these assessments, including an explanation of how these assessments align with the school's curriculum, performance goals, and state standards.

IACA intends to follow the district's assessment schedule. The 2019-20 MCPS Assessment Calendar is provided as Attachment F. Mandatory state assessments include:

- Florida Kindergarten Readiness Screener (FLKRS) – Kindergarten
- FSA English Language Arts (ELA) – Reading: Grades 3-8
- FSA ELA – Writing: Grades 4-8
- FSA Mathematics: Grades 3-8
- Statewide Science Assessment: Grades 5 and 8
- Civics EOC (grade 7); Algebra 1 and Biology EOCs (enrolled students, as applicable)
- Florida Standards Alternate Assessment: Grades 3-8, as applicable
- ACCESS for ELLs 2.0: English language learners, all grades
- CAPE digital tool certificate and industry certification assessments, as applicable

These types of formal summative assessment will be used to glean high level information on the overall effectiveness of our school, educational program, teachers, and curriculum and instruction. Formal formative assessments used to inform instructional decisions will include:

- Developmental Reading Assessment (DRA) – K-2
- Quarterly Standards Master Assessment (QSMA) for ELA – 3-5
- iReady for ELA and mathematics – K-8
- District Demand Writing – 3-5

As noted in prompt A, we intend to use iReady to assess outcomes for students in kindergarten through grade two, as well as for monitoring progress of all students during the year. In addition to student growth and mastery of standards data, iReady provides instructional resources we believe will benefit families as well as teachers. That said, we want to leave open the possibility that the principal, once hired, may wish to use a different proven-effective system compatible with IACA's project-based learning approach.

Understanding that MCPS has a robust assessment system, we hope to review the Comprehensive Standards Mastery Assessments (CSMA) and Quarterly Standards Mastery Assessments (QSMA) for alignment with the scope and sequence of our instruction. To the extent applicable, we propose to use available district assessments for consistency. If not, the school will develop appropriate standards-based interim assessments for each course.

In addition to the district and state standardized assessments, a wide variety of formal and informal classroom-based assessment procedures will be in place at IACA. Informal formative assessment includes planned classroom practice to elicit evidence of learning minute to minute

and day by day in the classroom, as well as non-summative assessments that occur while content is still being taught. Both of these can inform teachers of what students know or do not know; help students understand what it is they are ready to learn next; and enable teachers to adjust instruction accordingly for each of their students. Examples of the methods a visitor to an IACA classroom will see include:

- Ongoing observations
- Teacher questioning and teacher- or student-led class discussions
- Notes, summaries and written reflections based on readings, lectures, and discussions
- Evaluation of draft products using checklists, rubrics, and exemplars
- Annotations and notes based on close readings of texts

These kinds of naturally occurring "authentic assessment" are particularly well-suited to IACA's project-based program and focus on social and emotional learning. Individual and group projects completed over a longer period of time also may serve as a "follow up" to formal pre-tests or baseline assessments used at the start of the year or before introducing a new skill or concept. It is important to note that these categories are not fixed; the same assessment or test can be used for formative, benchmarking, or summative purposes. It is the use to which the results are put that determines if an assessment is summative or formative.

H. Describe how student assessment and performance data will be used to evaluate and inform instruction. Who will be responsible for managing the data, interpreting it for classroom teachers, and leading or coordinating professional development to improve student achievement?

It is incumbent on the school's leadership to make certain that all students, teachers, and staff have the resources necessary to achieve IACA's vision and mission. To do this, we will implement a robust MTSS to provide a framework for using student assessment and performance information to evaluate and inform instruction and a system of professional development that supports implementation of that system (described in detail in Section 4). Ongoing monitoring and analysis of school-wide, class, and student assessment data will be conducted by the school's MTSS leadership team, headed by the principal. Baseline testing at the start of the year identifies areas of strength and weakness; interim and end-of-year testing measures progress. The principal will ensure that relevant data are collected and evaluated at various times throughout the year. Toward the end of each year, the administrative team will meet with instructional teams to discuss the effectiveness of academic program and make plans for any necessary modifications.

A systematic, rigorous analysis of the school's data will inform operations and functions such as determining staff development needs, curriculum realignments, and the objectives stated in the annual improvement plan. Student outcomes on standardized and school-wide assessments, benchmark tests and quizzes, projects, presentations, exhibitions, and portfolios will help assess the effectiveness of the curriculum throughout the school year. Ongoing internal audits of student assessments will be utilized as tools to evaluate whether the curriculum is effective and meeting the needs of all students. Together, administrators and teachers will evaluate the curriculum, materials, resources, and other activities comprise the educational program. They will assess:

- Curriculum objectives measured through both authentic and structured local assessments
- Effectiveness of instruction as measured by direct impact on student achievement and performance (e.g., grades; FSAs; EOCs)

- Trends in student learning results to identify potential gaps in curriculum
- Student response to curriculum choices (e.g., project selection that occurs as part of project based learning)
- Teacher input regarding availability, accessibility, and effectiveness of instructional materials and resources

Our curriculum allows for ease in differentiation, so teachers at all grade levels will be able to quickly accelerate or reinforce a student's learning. In addition, some classes will be designed specifically to provide the necessary support, such as when a middle grades student who scores a Level 1 or Level 2 on the ELA or FSA Mathematics is enrolled the following year in an intensive reading or math class or a content area course in which E/LA remediation strategies are incorporated or a mathematics course in which mathematics remediation strategies are integrated.

I. Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve student learning.

Implementation of an effective MTSS requires strong building-level leadership. The principal will receive professional development and support specific to MTSS to ensure that he or she:

- Thoroughly understands the four-step problem-solving process and use the process to guide schoolwide problem solving
- Communicates and reinforces the expectation for data-based decision-making, guiding staff to frame their decisions within the context of student or other relevant data
- Communicates and reinforces the expectation that all Tier 2/3 services will integrate Tier 1 standards for performance, instructional materials and practices to facilitate the transfer of student performance from Tiers 2/3 to Tier 1
- Implements and participates in regularly scheduled "Data Days" throughout the year to ensure that instruction/interventions are informed by student data
- Facilitates the development of instructional schedules based upon student needs
- Ensures that instructional/intervention support is provided to all staff
- Ensures that instruction/intervention "sufficiency" and the documentation of that sufficiency occurs for all students receiving Tiers 2/3 support
- Establishes a system of communicating student outcomes across the professional staff and with students and parents

As part of the required MTSS training, administrators and staff will participate in a data-driven decision-making training where they learn to analyze, extrapolate, and disaggregate school data from a variety of sources and then use this data to create effective school improvement plans and increase student achievement. Other topics to be addressed through face-to-face training, a train-the-trainer model, or online modules include such things as the screening process, progress monitoring, and multi-leveled prevention systems.

J. Describe the corrective actions the school would take if it falls short of student academic achievement expectations or goals at the school-wide, classroom, sub-group, or individual student level. Explain what would trigger such corrective actions and who would be responsible for implementing it.

As described in Section 4, the MTSS leadership team, guided by the principal, is responsible for tracking the school's progress toward meeting its established goals. Information gleaned through

this process will support and form the foundation for the school's ongoing improvement process. While MTSS addresses individual, subgroup, classroom/grade level, and/or schoolwide improvement needs, a school improvement or action plan formalizes the way goals are set, responsibilities are delegated, and performance is measured. Beginning in its second year of operation, the principal will lead the charge to develop a schoolwide plan. It will be the primary tool used by school personnel and other stakeholders to review data, set goals, create an action plan and monitor the school's progress. A "living document," the plan will be continually updated, refined, and used to guide the school's work throughout the year. It will be developed in a coordinated, integrated manner and include current school status, expected improvement, goals, and an action plan for improvement that includes targeted, data-based professional development. Board members will assist by participating in and developing short and long-range plans for the school, especially with regard to the school improvement plan. It will monitor the effectiveness of the school's programs and implementation to determine if the school has met its stated goals.

K. Describe how student assessment and performance information will be shared with students and with parents.

IACA believes parents play an integral role in their child's education. To keep parents and students informed, student progress will be formally reported at least quarterly through report cards. Additionally, the school will utilize an online student information system that will enable parents and students to keep up to date regarding grades, assignments, and other relevant information; such as Skyward, Inc.'s Family/Student Access portal currently used by MCPS. Students will be encouraged to regularly review their own data and to self-advocate if they are struggling or unsure of what is expected.

In addition to general sharing and communication of assessment and performance data, parents will be invited to participate in and be kept informed of problem solving activities conducted on behalf of their children by the MTSS leadership team or problem solving team. Input from both parents and students is critical to the development and implementation of effective intervention plans. To the extent possible, progress monitoring plans developed through the problem solving process will include opportunities for students to graph and track their own data.

L. Describe the plan for protecting the privacy of individual student academic performance data and other student-related information.

All communication and correspondence between the school, parents and students will adhere to the protection and privacy guidelines found in the Family Education Rights and Privacy Act (FERPA) and any additional provisions pursuant to section 1002.22, F.S. IACA will comply with all FERPA provisions and other applicable state and federal regulations regarding the establishment, maintenance and disposal of student records. IACA will adhere to the requirement under s.119.021(1)(b), F.S., which states that, insofar as practicable, all public records must be stored in fireproof and waterproof safes, vaults, or rooms fitted with noncombustible materials and in such arrangement as to be easily accessible for convenient use. Student and employee records will be locked with only the essential staff having access to the files, and a system will be put into place to record who has accessed the student records, and if they are checked out for review a method to ensure they are returned within the day they are checked out.

Section 6: Exceptional Students

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

In determining the projected population of student with disabilities, 2018-19 data from the Florida PK-20 Education Information Portal were reviewed for district-operated elementary and middle schools located within a 10-mile radius of the proposed location. The percentage of exceptional education students with disabilities in the area schools ranged from 4.4 percent at Dr. N.H. Jones E.S. to 22 percent at Marion Oaks E.S. We assumed the significant variation is reflective of the use of cluster programs at selected sites that have been established to provide more intensive specialized services and supports to students with complex educational needs. The district's overall percentage of students with disabilities is 15.4 percent, and approximately 13.3 percent in the comparison schools closest to the proposed location. Since this includes prekindergarten students with disabilities and students with the most significant disabilities who require the most intensive and specialized services beyond those available at every school, we anticipate that approximately 13 percent of our enrollment will be students with disabilities. We also anticipate approximately six percent will be gifted, in line with the district's overall rate. The number of students requiring accommodations through a Section 504 plan could not be determined based on the available public reports.

Table 6.1 ESE Enrollment Projections – Years One through Five

	Percentage	Y 1	Y 2	Y 3	Y 4	Y 5
Total Enrollment		214	378	560	720	862
Students with Disabilities	13	28	49	73	94	112
Gifted Students	6	13	23	34	43	52

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.

IACA values diversity and is committed to serving a student population that mirrors the community. The school will not discriminate on the basis of race, religion, ethnic origin, or disability. All students wishing to enroll are required to follow the application procedures and timelines described in Section 14, including the lottery process applied in the event applications exceed capacity. The lottery will be conducted in such a way as to ensure there is no possibility of discrimination of students who may have disabilities, or of any other protected class.

In addition, the school's outreach and marketing materials will include an explanation that IACA is a tuition-free public charter school; its enrollment policies are nondiscriminatory and nonsectarian; and services and supports are available to address the needs of all students, including students with disabilities receiving services through an individual educational plan (IEP) or Section 504 Plan, English language learners, and gifted students.

C. Describe how the school will work with the sponsor and through the Individual Education Plan (IEP) process when necessary to ensure students with disabilities receive a free appropriate education (FAPE) in the least restrictive environment (LRE).

When a student with an IEP enrolls in IACA, whether from within the district or as a transfer student from within Florida or out-of-state, the school's ESE specialist/lead ESE teacher will

carefully review the student's IEP as soon as it is available and inform the MCPS district ESE specialist assigned to the school of the student's enrollment. It is our understanding that the district will make a district ESE specialist available to the school; this person will serve as the local education agency (LEA) representative at individual IEP team meetings upon request and at all staffings.

In the event there are services on the IEP that are not currently or readily available at the school, we will work with the ESE specialist to convene an IEP team. Educational programs differ across schools in a variety of ways. Because of those differences, for some students a receiving school's IEP team may determine that the IEP from the sending school can be amended to provide different but equally effective services and supports to meet the student's needs resulting from the disability. The IEP team will determine the special education and related services; supplemental aids and services; supports for school personnel; and least restrictive, most appropriate placement that will allow the student to progress in the general curriculum and attain the annual goals on the IEP.

If the IEP team determines that the nature or intensity of the student's needs are such that they cannot adequately be met at IACA, the team, including the district LEA representative and the parent, will determine an appropriate placement. We believe that by working in collaboration with MCPS we will be able to ensure the appropriate placement of students with disabilities within the full continuum of services available within the district.

D. Describe the methods the school will use to identify students with disabilities that have not yet been identified.

In accordance with our MTSS framework (see Section 4), if a student enrolled in the school exhibits academic, social, or behavioral challenges, the school will implement a cyclical four-step problem solving process through which, students will be provided targeted academic and/or behavioral instruction and interventions, including systematic progress monitoring measures and fidelity checks to ensure staff have the resources necessary to implement the interventions as designed. Throughout the problem solving/response to intervention (PS/RtI) process, the problem-solving team (PST) will convene on a regular basis to document and analyze the student's progress, the interventions attempted, and the results of those interventions. As part of its regular data review and analysis process, the PST will explicitly consider the following questions:

- Does the student's RtI data indicate the interventions are effective but require a level of intensity and resources to sustain growth or performance that is beyond that which is accessible through the school's general education resources?
- Does the student's RtI data indicate the student does not make adequate growth given effective core instruction and intensive, evidence-based interventions?

If at any time the team determines one of these conditions exists, a referral for an exceptional student education (ESE) evaluation will be initiated. In addition, if at any time a parent requests an evaluation for their child, the school will schedule a meeting with the parent to discuss the areas of concern and respond to the parent's request without delay. If the parent requests an evaluation prior to the implementation of general education intervention, or if the student demonstrates severe cognitive, physical, or sensory impairments or presents a danger to self or

others, intensive individualized interventions and supports will be implemented concurrent with the evaluation.

We anticipate that initial evaluations for ESE placement are covered under the administrative services fee as described in the Florida Standard Charter Contract.[25] In accordance with MCPS Board Policy 3.90 III.G., district staff "will be available to provide assistance in conducting evaluations." We anticipate that a more specific understanding of the respective responsibilities of the district and the school with regard to evaluation of students referred for potential ESE eligibility will be established through the contract negotiation process.

Evaluations will be conducted through collaboration between the district and the school in accordance with Florida statutes and rules. Once the evaluation is complete, a team of professionals and the parent will convene to determine if the student meets ESE eligibility requirements under State Board of Education rules and to determine the student's educational needs. The team will include the LEA representative or designee, evaluator(s) in accordance with district policy, at least one of the student's teachers, an ESE teacher from the school, and an IACA school administrator or designee.

E. Describe the programs, strategies, and supports the school will provide, including supplemental supports and services and modifications and accommodations to ensure the academic success of students with disabilities whose education needs can be met in a regular classroom environment with at least 80% of instruction occurring in a class with non-disabled peers.

In accordance with IDEA, students with disabilities enrolled in IACA will be provided FAPE in the least restrictive environment. ESE services will be provided by appropriately credentialed and certified individuals. Initially, the school will directly employ the necessary ESE teachers, and contract with outside agencies (or MCPS, if personnel are available) for appropriately credentialed individuals to provide related services including but not limited to: speech therapy, language therapy, occupational therapy, physical therapy, and counseling. As caseloads warrant, the school will hire full- or part-time related service providers in lieu of contracted staff. The school's inclusion model will provide direct and indirect ESE services utilizing the following service delivery models:

- Support Facilitation – Also known as inclusion teaching or in class one-on-one, the ESE teacher will work with individual or small groups of students on an individualized basis within a traditional classroom to provide direct ESE support and specialized instruction. The small group of students may include struggling nondisabled peers on occasion.
- Collaboration – The ESE teacher and general education teacher will meet face-to-face on a regular basis to plan, implement, and monitor instructional alternatives and positive behavioral interventions designed to ensure the student is successful in the general classroom. In collaboration, the ESE teacher/service provider actively collaborates with the general education teacher to implement and monitor instruction and intervention.
- Consultation – The ESE teacher will meet face-to-face on a regular basis with the general education teacher to advise the general education teacher about effective academic and behavioral strategies to use with the student and provide technical assistance.

[25] http://www.fldoe.org/schools/school-choice/charter-schools/charter-school-reference/

- Pullout ESE – The ESE teacher will work with individual or small groups of ESE students on an individualized basis outside of the general education classroom. Students will only be removed from the general education when the nature or intensity of the specially designed instruction precludes implementation within the regular classroom.
- Pullout Therapy – Services such as occupational therapy, speech therapy, and counseling are most often provided one-on-on or in small group settings with other ESE students.
- Dual-Certification – The school's hiring process will include a concerted effort to hire teachers who hold ESE certification in addition to certification in the subject areas and grade levels to which they are assigned.

The most critical supports provided to students with disabilities are the instructional strategies used to teach the student (i.e., specially designed instruction, or SDI) and the supplemental aids and services and accommodations the student provided to enable the student to access the educational program. The type or approach to SDI will be based on each student's level of need, learning style, and the content or skill being addressed. Educational staff and IEP teams will use resources such as the *IEP and Lesson Plan Development Handbook*[26] to identify appropriate SDI, classroom accommodations, and supplemental aids and services to meet their students' needs.

The following are examples of supports that will be implemented:

- Supports to address environmental needs (e.g., preferential seating; planned seating in the classroom, at lunch, during assemblies, and in other locations)
- Presentation of subject matter (e.g., clarification of key concepts; graphic organizers, alternate presentation of content; planning guides; scaffolded instruction; mnemonics)
- Direct or explicit instruction in content, skills, and strategies (e.g., instruction in the use of graphic organizers, comprehension strategies, writing process, mechanics and usage, math computation and reasoning strategies)
- Pacing of instruction (e.g., breaks; extended processing or response time; complex information divided into chunks or sections)
- Assignment adaptations (e.g., shortened assignments; instructions broken down into steps)
- Multiple means for practice opportunities (e.g., learning centers; games; rhythmic activities; variety of reading materials, including books, magazines, computer software)
- Self-management and/or follow-through (e.g., calendars, study skills; behavioral intervention plan; use of rubrics or scoring guides)
- Ongoing assessment and use of testing accommodations (e.g., frequent comprehension checks; alternate formats to demonstrate mastery; test read aloud (except reading), extended time)
- Speech/language therapy, occupational therapy, physical therapy, and counseling
- Social interaction support (e.g., cooperative learning groups; social skills instruction; peer buddies; positive behavior intervention plan or behavior contract)

[26] IEP and Lesson Plan Development Handbook, Revised, January 2009. Developed by the Kentucky Special Education Cooperatives and revised by the New York State Education Department. Accessed 9/2/2019. http://www.p12.nysed.gov/specialed/commoncore/guidance-commoncore-appC.htm

- Systematic progress monitoring to assess the effectiveness of the specially designed instruction
- Training/professional development for school staff regarding identification and implementation of effective and appropriate strategies based on student-specific needs

As described in Sections 3 and 4, the educational program, curricula, and instructional materials we have identified offer a significant amount of supplemental and support materials for students who are behind grade level; these materials and strategies are proven effective with students with disabilities and English language learners as well. In addition, intensive reading and mathematics courses will be provided when necessary for middle grades students performing significantly below grade level.

Our inclusive classrooms will support general education and ESE teachers working together to educate all students in the regular education environment. If a student's needs cannot be met in the regular classroom, even with appropriate supplemental aids and services, the IEP team may determine that pullout for some amount of time is necessary (e.g., very intensive, specialized academic instruction; specially designed instruction in social skills). However, we anticipate that the majority of special education and related services, supplemental aids and services, and accommodations are most effectively and appropriately provided within the general education setting.

As part of the school's MTSS and professional development plan, teachers and administrators will continuously seek more effective and efficient instructional strategies and will be looking to capitalize on resources and trainings available through the district as well as internally. Applying universal design for learning principles to the school's unique educational and implementing inclusive scheduling techniques (see *Flexible Scheduling for In-Class Supports: A Blueprint for Change*[27]) will enable us to maximize educational opportunities for all our students.

F. Describe how the school will work with the sponsor and through the IEP process to determine whether a student with a disability whose education needs require a regular classroom and resource room combination (between 40-80% of instruction occurring with non-disabled peers) can be provided FAPE by the school.

As described in prompt C above, all placement decisions are made by the IEP team and are based on the student's individual needs. We believe that IACA's whole child approach and carefully selected curricula and instructional materials will be most effectively implemented within the general education classroom with robust ESE supports (see Item E). To this end we strongly support push-in inclusive services to the extent possible, particularly for students who are being taught the general Florida standards and who will be assessed through the general FSAs and EOCs.

Placement data statewide support the importance and effectiveness of inclusive placements. Between 2005-06 and 2018-19, regular class placement[28] statewide increased from 55 percent to 76 percent, a 21 point change. During this same period, performance outcome data for students with disabilities statewide has steadily increased. This pattern lends credence to our belief that a

[27] Florida Inclusion Network. Accessed 9/2/2019.
http://handouts.pbworks.com/w/file/fetch/109771021/FlexibleSchedulingforInclusivePractices.pdf
[28] For Federal reporting purposes, regular class placement includes students who spend 80% or more of their school week with nondisabled peers (i.e., in general education settings; not removed to an ESE setting)

robust system of supports implemented within the general education classroom is more likely to result in increased student performance when compared to placement in an ESE classroom.

The pattern for districts within MCPS's size-alike enrollment groups was even more significant, increasing from 55 percent to 78 percent, resulting in a 23 point change. Within MCPS itself, an upward trend is evident, although the rate of change is notably lower than comparison districts or the state. The percent of students with disabilities served in regular class placement increased from 59 percent to 68 percent, for an overall increase of eight points.

We believe that the vast majority of students with disabilities being instructed in the general standards are best served through inclusive placements. As described, we will have pullout services available for students with more significant academic or behavioral needs and will not place a limit on the amount of time a student may be removed from the general classroom, but we believe the vast majority of students will be able to be supported within the general classrooms for 80 percent or more of the school week.

G. Describe how the school will work with the sponsor and through the IEP process to determine whether a student with a disability whose education needs require a separate classroom (less than 40% of instruction occurring with non-disabled peers) can be provided FAPE by the school.

As described in prompts C and F above, all placement decisions are made by the IEP team and are based on each student's individual needs. We understand that instruction in the Florida Standards Access Points is setting neutral, and only students with the most unique, intensive, or specialized needs will require separate class placement (less than 40% of instruction occurring with nondisabled peers). After careful consideration of all of the student's needs and the resources currently or potentially available if the IEP team determines that the student has needs that cannot adequately be met through the type and amount of supports IACA can provide, the team, including the district LEA representative and the parent, will determine an appropriate placement. The decision-making process will mirror the process the district currently implements when an IEP team determines that a student requires specific supports and services that are not available through the current school of enrollment. We believe that by working in collaboration with MCPS we will be able to ensure the appropriate placement of students with disabilities within the full continuum of services available within the district.

H. Describe the plans for monitoring and evaluating the progress and success of students with disabilities to ensure the attainment of each student's goals as set forth in the IEP or 504 plan, including plans for promoting graduation for students with disabilities (high schools only).

All classroom teachers and ESE service providers will have access to their students' IEPs and Section 504 plans; be informed of and understand their roles in implementing them; be provided the resources and supports they need to implement them; and be held accountable by the school's administration for their implementation, which will include documenting the provision of ESE and Section 504 accommodations, services, and other supports as required.

We understand the scheduling challenges faced by inclusive programs seeking to provide all of the academic and behavioral supports students with disabilities need within the general education setting, and the importance of ensuring fidelity to the schedules once established. The principal or designee will work with the ESE teacher(s) and guidance counselor to ensure

reasonable and effective schedules are developed. A system will be implemented for school employees and contracted staff to log services as they are provided in accordance with the students' IEPs. The principal or designee will oversee this process.

Reports of progress towards annual goals will be provided to parents in accordance with students' IEPs (e.g., quarterly in conjunction with report cards). In addition, students with disabilities will continue to receive tiered interventions in accordance with identified needs and be subject to the same progress monitoring procedures as all other students as described in Section 6. In circumstances when there is a lack of expected progress toward IEP annual goals, the IEP team will reconvene to review the IEP and determine whether any amendments to the IEP are necessary. Similarly, when a student with a 504 plan experiences a lack of expected progress the 504 team will reconvene to determine if the designated supports are still appropriate and, if not, what additional action is needed.

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

Based on projected enrollment, we believe we will initially require two ESE teachers, with additional staff added as enrollment increases. The projected ESE staffing plan is based on ratio goals of 1:25 for students with disabilities. This ratio is based on the total number of students with IEPs but takes into consideration that a large number of those students will like require services primarily from a speech language pathologist (contracted position until enrollment warrants a direct hire). The plan for gifted teaches is based on ratio goals of 1:40, with the expectation that at least one teacher per grade level will hold gifted endorsement. This endorsement will be a consideration during the hiring process and all teachers will be encouraged to obtain credentials in this area.

Table 6.2 ESE Staffing – Years One through Five

	Ratio	Y 1	Y 2	Y 3	Y 4	Y 5
Projected Total Enrollment		214	378	560	720	862
ESE Teachers – Disabilities	1:25	2	2	3	4	4
Gifted Teachers	1:40	.5	.5	1	1	1

The school will ensure that one teacher serves as the lead gifted teacher to support the provision of services to gifted learners and to complete any case management duties. The principal and designated ESE specialist/lead teacher will work with the ESE teachers to ensure required services are being implemented as required. In addition, we are cognizant of the fact that this staffing plan may have to be revised as we learn more about the needs of our enrolled students.

For example, if the students who apply require more direct services, the teacher: student ratio will need to be reduced, requiring additional ESE staff. The principal will work with the ESE staff to determine the appropriate ratios based on the current student needs, and then work with the board to ensure the budget properly reflects the necessary staffing resources to meet the needs of the ESE program.

We intend to contract with a speech/language pathologist (SLP) until caseloads warrant hiring our own SLP. We anticipate relying on contracted providers for related service such as occupational therapy, physical therapy, counseling, and other specialized services that may be needed. ESE teachers will hold ESE certification required for their positions and other ESE service providers will meet the required licensure and/or certification requirements pertaining to

their area of related service. The ESE specialist will have demonstrated experience in teaching students with disabilities and will receive targeted professional development and training related to ESE compliance.

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

At the most basic level, the school's effectiveness in serving ESE students will be measured by the students' progress toward meeting their annual goals, which will be reported to parents at least quarterly. Annual goals on the IEP serve somewhat as benchmarks toward the ultimate goal, which is for all students to learn and grow through their educational experiences and achieve to their highest potential. Given this ultimate goal, perhaps a more telling evaluation is the students' performance on the same formative and summative assessments that are administered to all students. In addition to student performance on the FSA, data sources will include but not be limited to such things as:

- Baseline, interim, and final assessments
- Chapter or unit curriculum-based assessments
- Course grades
- Student work products
- Formative assessments of project-based learning

Progress monitoring will provide a systematic method for tracking and comparing an individual's or group's performance. The MTSS school-based leadership team will disaggregate student data by the following subgroups as part of its routine monitoring of core and supplemental instruction: race/ethnicity; English language learners; students with disabilities; gifted student; and socio-economic status. Progress will be measured by comparing expected and actual rates of learning.

In addition, the school will engage in annual compliance reviews, either independently or in collaboration with the assigned district ESE Specialist. Other measures to assess the quality of the program will include feedback from students, parents, and staff on the Family Survey and results from the FDOE survey for parents of students with disabilities, to the extent results may be available at the school level.

K. Describe how the school will serve gifted and talented students.

Identification

IACA will provide educational services to students eligible for gifted services as defined in the MCPS Exceptional Student Education Policies and Procedures (SP&P), including the district's plan for increasing the identification of students from traditionally underrepresented groups. As with students with disabilities, we anticipate that initial evaluations to determine eligibility for the gifted program will be conducted by the district in collaboration with the school. Once the evaluation is complete, the district will convene a team to determine if the student meets eligibility requirements in accordance with State Board of Education rules and the MCPS SP&P. If a student is determined to be eligible for gifted services, an educational plan (EP) will be developed. In addition to the LEA representative assigned by the district, the EP team will include at least one of the student's general education teachers and an IACA gifted teacher.

As required for students in kindergarten through grade eight, IACA will ensure EP reviews are conducted at least every three years, or more frequently if required to meet individual student needs. In addition, an EP team will convene when needed at the request of the parent, upon articulation from elementary to middle schools, and when gifted students transfer into the school.

Gifted Services

The service delivery models we propose to implement are support facilitation and/or cluster grouping, depending upon the needs of gifted learners enrolled in the school. Through support facilitation, students will receive support from a gifted endorsed teacher in the general education environment, either one-on-one or in a small group. Within a cluster grouping model, students will be grouped based upon strengths in the same content area(s) in an otherwise heterogeneous general education classroom taught by a teacher who has the gifted endorsement in addition to the required certification. All teachers will be encouraged to pursue gifted endorsement, and preference will be given during the recruitment process to teachers who hold it. In addition, if supported by student interest and sufficient enrollment, selected advanced content classes for gifted and non-gifted students may be offered for middle grades students. Students are grouped on the basis of achievement and interest in specific content areas; the content, pacing; process skill emphasis, and expectations for student outcomes differ from regular courses; and the classes are taught by gifted endorsed teachers. When implementing any of these service delivery models, teachers will be required to clearly document in lesson plans the differentiation, and/or modifications for the students to address their EP goals.

The *Resource Guide for the Education of Gifted Students in Florida*[29] explains that effective programming for gifted learners combines three elements: acceleration, in which instruction is matched to the competence level of students; enrichment, in which opportunities for investigation of supplementary materials are given; and individualization, in which instruction is matched specifically to the learner's achievement, abilities, and interests. As can be seen, IACA's student-centered project-based learning educational program is directly aligned to these elements. The school's inquiry-driven curriculum will inherently provide opportunities for extension in reading materials, side-investigations, and creative and unique product development. In addition, the complexity, depth, and pace of tasks will be varied to challenge and support advanced students throughout the learning process. Lesson material will be tiered to challenge these students to engage with the content on a deeper level and utilize their critical thinking and problem-solving skills to access the learning goal from multiple angles and perspectives.

[29] Bureau of Standards and Instructional Support, Division of Public Schools, Florida Department of Education. Rev. 2019.

Section 7: English Language Learners

A. Describe how the school will meet the needs of English Language Learners as required by state and federal law, including the procedures that will be utilized for identifying such students, ensuring that they have equitable access to the school's programming and communicating with their families.

IACA is committed to preparing and equipping our bilingual, bicultural, and biliterate students for success. We will implement the district's English language learner (ELL) plan and ensure the ELL program complies with state and federal requirements by providing students who need it with English language development instruction that is both age and grade appropriate. We intend to work closely with MCPS English for Speakers of Other Languages (ESOL) Department to ensure that we implement the district's ELL plan with fidelity, and the need of our ELLs are met in accordance with state and federal law. We will use the district's forms and procedures to implement and document all ELL requirements. The district's current ELL plan remains in effect through the 2021-2022 school year. The procedures described here reflect our understanding of its requirements, but we understand that a new plan will be in place when IACA opens in 2022-23. We will work closely with MCPS to ensure that our policies and procedures adhere to the plan.

It is our intention that once this application is approved and our principal hired, he/she will meet with a designee from the district's ESOL Department to confirm our procedures meet expectations and ensure ELL students receive the receive the services to which they are entitled. The school's ELL committee (e.g., school administrator or designee, school counselor, ESOL contact, classroom teacher(s), parent(s)/guardian(s), and/or any other person deemed relevant) guides the school's ELL program. If the committee is convened to consider inconsistent test data on which to base eligibility, exit, or extension of ESOL services for a student, possible retention of an ELL student, or any other time there is a need to reevaluate an ELL's educational plan, the parent will also be invited to participate as a member of the team.

Identification

Families will complete an *Initial Student Registration Application* form online during the registration process, which includes the Language Survey. Any survey with at least one affirmative response will determine the need for assessment of English language acquisition and be directed to the principal or designee. (e.g., ELL coordinator/teacher/contact) In this case, Kindergarten students will be assessed using the *W-APT WIDA Screener*. Students in grades one through eight will be assessed using the *WIDA Screener.* Students who score below proficient will be eligible for ESOL services. During registration, when applicable, the date the student entered into a U.S. school, and students' immigrant status will also be captured on the online application form.

Placement

At the time of registration, the principal or designee will review all available school records, transcripts and data sources regarding educational experiences. Any available formal and/or assessment information will be reviewed. The school will work to make prompt and reasonable attempts to obtain and previous educational records as soon as possible. In addition, the parent and when applicable, the student, will meet with the principal or ELL designee to conduct parent and/or student interviews, and use all pertinent data to determine the appropriate grade level

and/or subject area placement for the student including their social history and chronological age. ELLs are then placed accordingly, and academic progress is monitoring regularly to ensure that accurate decisions were made. The procedures utilized are documented on the programmatic assessment form and are maintained in the student's cumulative record. In the event student records are unattainable, parents are asked to provide information regarding prior educational experience. The school will take into consideration the age of the student and assess the student when appropriate.

For students who have withdrawn from MCPS and have been gone over one calendar year, and re-entered from another district, a current English language proficiency assessment will be administered at the student at the time of re-entry. Information gleaned from this assessment will assist the school in determining the student's placement and current services. The original Language Survey, school entry, classification, and date the student entered a U.S. school remain the same. For students reentering MCPS from a district within Florida within the calendar year, the school will use the most recent ELL assessment data and placement determination from the sending school district.

ELL Student Plan

The student ESOL Program Plan for English Language Learners is developed by a variety of ESOL Committee members which may include parents. The plan is initiated by the school's ELL designee who collects information relevant to the student plan, which may include and is not limited to the following:

- *WIDA Screener, W-APT,* or WIDA *ACCESS* data
- *Florida Standards Assessment* or *Florida Standards Alternate Assessment* data
- English Language Arts grades
- Other programs, retentions, interventions, or referrals (if applicable)
- Input from school counselor, ESOL school designee, classroom teachers, and ELL committee members

The school's ELL designee will include the student's instructional delivery model. The ELL plan may include specific accommodations for state and classroom assessments. The ELL designee is responsible for completing the *ESOL Program Plan for English Language Learners* and signs the document once its complete. When an ELL committee is convened, parents are invited; ELL committee members present sign this document. The student's ELL plan and all supporting documentation is maintained in the student's cumulative file. The ELL plan is updated annually the beginning of each school year, when services change, and is expected to include the instructional schedule.

Access

All students, including ELLs, will be provided full and equitable access to all services and programs implemented by the school, including compensatory, dropout prevention, enrichment, and other supportive services. All courses available to IACA students, will be available to ELL students. ELL students will receive the necessary accommodations for classroom instruction and statewide assessments. Examples of assessment accommodations include, but are not limited to, additional time, oral presentation of directions, flexible setting, and small group for testing. Students' needed accommodations will be documented in the ELL plan.

Communication with Parents

All written and oral communication with parents will be in the parents' primary language or other mode of communication commonly used by the parents unless it is clearly not feasible. IACA will utilize ESOL forms in languages already available from the district.

B. Describe specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students, including those below, at, or above grade level.

IACA will implement Mainstream/Inclusion – English and Mainstream/Inclusion – Core/Basic Subject Area models. Students classified as ELLs, including those below, at, or above grade level, will be placed in grade level classes with fluent English speakers. English will be the language of instruction, and strategies designed to meet the needs of ELLs will be implemented by ESOL endorsed teachers. Given that all staff will share responsibility for all ELL students, the principal and school staff will receive ongoing training and professional development regarding related to instructional practices. Classroom attributes found to be associated with positive outcomes for ELLs that will be embedded within the school's educational program include explicit skill instruction; opportunities for additional practice; student-led activities; student collaboration and modeling; instructional strategies that enhance understanding; systematic student assessment and progress monitoring; and a balanced curriculum.

Educational Practices

IACA's unique student-centered educational program aligns with the universal design for learning and meets the needs of all students, thereby, ensuring academic attainment for English language learners. All of the instructional materials being considered include supplemental materials and supporting strategies for ELLs. The school's focus on project-based learning is a powerful instructional strategy for ELLs, known for its effectiveness in teaching content while simultaneously fostering English language acquisition. At IACA, all teachers across content areas will incorporate instructional models that support ELLs, including:

- Providing opportunities for authentic English communication, such as encouraging conversations, role-playing, questioning, brainstorming, and other opportunities to send and receive oral messages
- Using technology effectively to engage ELL's motivation, developing writing and editing skills, and tapping into the collaborative potential of class websites and blogs
- Presenting ELLs with challenging curricular content that involves authentic reading and writing experiences linked to their cultures while providing textual choices as well as meaningful content
- Setting high expectations and focusing on achievement rather than language proficiency; placement in challenging classes with quality instruction enables students to learn more
- Encouraging teachers to recognize and appreciate socio-cultural factors by demonstrating awareness of students' backgrounds and their prior literacy experiences
- Training teachers to understand the challenges many ELLs experience when learning a second language (e.g., understanding implicit cultural knowledge and norms; learning to code switch; dealing with political, cultural, and social dimensions of language status issues; negotiating disparities between home/community and school literacy practices)

Florida has adopted the WIDA English language development (ELD) standards that outline the progression of English language development and exemplify how to teach academic language within the context of content area instruction. Course descriptions accessed through CPALMS include the applicable ELD standards along with implementation guidance. IACA teachers will be required to refer to the standards when developing lesson plans and include in those plans instructions to meet the needs of their special student populations, including ELLs. The principal will use this information to inform "walk-throughs" to ensure ELLs are receiving the type and quality of instruction they require to support their linguistic needs. Specifically, the principal will be looking for evidence of such things as: bilingual dictionaries in use by students and teachers; extended time and flexible setting to meet ELLs needs; active engagement of ELLs in classroom activities and lesson; documentation of specific consideration of ELLs in teachers' lesson plans; integration of the ELD standards in lesson plans; and, overall, teacher awareness of the ELL levels and unique needs within their classrooms.

Strategies

Teachers will be trained in strategies that support ELLs, students with disabilities, and other struggling students. Scaffolding techniques will include bridging, contextualization, schema-building, text re-presentation, and metacognitive development. Effective instruction for ELL students requires teachers to continuously assess students, adjust the scaffolding to match their strengths and needs, and pay attention to their language development and cultural backgrounds. Examples of other types of strategies that will support our ELLs include:

- Providing a climate of warmth and caring which nurtures a sense of comfort
- Seating the student close to the front of the room
- Establishing a daily routine in the classroom and preparing the students for any changes
- Using multiple senses (seeing, hearing, touching) to present information to students
- Providing clear guidelines for written work and homework assignments
- Providing alternative instruction when class lessons are especially difficult or confusing for the student
- Utilizing oral techniques, such as cueing, modeling elicitation, and chunking
- Utilizing graphic organizers such as webbing and semantic maps
- Using listening devices such as tape recorders and language masters to build vocabulary and listening comprehension
- Matching instructional and reading materials to both language needs and student interests
- Using illustrations or graphics that support and extend meaning
- Using flash cards and pictures to build vocabulary
- Using manipulatives to help students visualize the math concepts
- Teaching math concepts and computation procedures through games and kinesthetic activities

C. Provide plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services.

Annual English Language Proficiency (ELP) Summative Assessment

ACCESS for ELLs 2.0 is the language proficiency assessment system utilized by WIDA Consortium states, of which Florida is a member. As described in Section 5, student performance on the ACCESS for ELLs 2.0, FSAs, and EOCs are used to assess progress and measure success

at the most "formal" or standardized level. In addition, less formal formative and summative assessment of ELLs will occur throughout the year through curriculum-based placement tests, benchmark and interim assessments, class assignments and tests, informal observations, and other routine assessment activities. Upon receipt of assessment scores, the school will exit students no later than the last day of the school year for that year. If assessment scores are received at the end of the school year, the school will exit students within two weeks after the beginning of the following school year and utilize the last day of the school year as the exit date. IACA's administrators and teachers will monitor the progress of all students throughout the year. Monitoring and evaluation are applied at the school, classroom, and individual levels, and ELLs are one of the sub-groups whose progress will be closely scrutinized by the MTSS team.

Exiting and Post Re-Classification Reviews

In accordance with Rule 6A-6.0903, F.A.C., an ELL is determined English language proficient and exited from the ELL program upon obtaining scores of "Proficient" at the applicable grade level on each subtest of the Kindergarten ACCESS for ELL, ACCESS for ELLs, or Alternate ACCESS for ELLs assessments. Once students meet exit criteria, he/she is monitored for two years. Parents are notified of their child's exit through a letter in the child's native language, unless it is not feasible. Upon the request of a student's teacher, counselor, administrator, or parent, a student who has been enrolled in an ESOL Program may be reevaluated for English language proficiency by convening an ELL committee at any time. We will follow the MCPS procedures for conducting post-reclassification reviews. The school's ELL designee and the student's ELA teacher will be responsible for monitoring the follow-up of students who have exited the program. At a minimum, reviews will be conducted when the first report card is issued after the student exits the ESOL program, at the end of the first semester, the first year, and the end of the second year after exiting. As described in the district plan, if a student is not on grade level, a referral to the ELL committee will be made. Based on thorough review of the student's report cards, work samples, standardized assessment results, classroom performance and other teacher and parent input, the ELL committee will determine whether the student should be reclassified as an ELL and re-enter the ELL program. The ELL committee may also refer the student to the PS/RtI team.

D. Describe the staffing plan for the school's English Language Learner program, including the number of and proposed qualifications of staff.

IACA projections based on districtwide ELL data are provided below.

	Percentage	Y 1	Y 2	Y 3	Y 4	Y 5
Total Enrollment	9%	214	378	560	720	862
English Language Learners		19	34	50	65	78
ELL Coordinator/Specialist		*	1	2	2.5	3

* Responsibilities assigned to existing duly credentialed staff member(s)

An ELL designee will be included among the school's staff. It is our expectation that during Year 1 the ELL designee/ELL coordinator responsibilities can be assigned to a current staff member who holds ESOL endorsement (e.g., English teacher; school counselor) without needing to hire an additional person. However, should the population be large enough that this will not be possible, the board is prepared to allocate necessary resources to hire an additional staff person to oversee the needs of the ELL students. The decision as to whether a separate position for ELL coordinator is needed will be made once the total enrollment of ELL students is known. We will

actively recruit teachers, paraprofessionals and parent volunteers who speak the home languages of our ELL students (primarily Spanish). We will give priority to teacher applicants who hold Florida ESOL endorsement. It is our understanding that most recent Florida college graduates have had the required ELL courses and already have this endorsement. While not a requirement for being hired, teachers who do not hold ESOL endorsement will be strongly encouraged to seek it beginning their first year. However, if a teacher without ESOL endorsement has an ELL student in his or her classroom, the teacher will be required to seek such endorsement as a condition of continued employment. We will ensure that at least one teacher at each grade level holds the endorsement, so that services such as assessment and coordination of the ELL plan can be accomplished by that teacher. At least one member of the PS/RtI team also will hold the endorsement to appropriately represent and support ELL students.

Section 8: School Culture and Discipline

A. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.

The most common predictor of outstanding academic achievement is a focused, positive school culture that includes clear, high expectations for every student. Without this, consistent long-term academic achievement is very difficult to achieve. Strong cultures do not develop automatically; instead, they are carefully and thoughtfully constructed and nurtured.

In accordance with its mission, IACA strives to provide an educational experience through which students develop active and creative minds, understanding and compassion for others, and the courage to act on their beliefs. We intend for our students to become independent, creative and compassionate learners, leaders, and problem solvers. To this end, we've created a thoughtfully prepared, holistic learning environment that values and nurtures the whole child: mind, body, and spirit.

A safe, secure environment begins in the classroom. Effective classroom management techniques influence and provide an environment conducive to learning. Consistent efforts related to classroom management will align with the school-wide core behavioral and social/emotional framework. As described elsewhere in this application, core components of the IACA's approach to social and emotional learning are Morning Meeting and Circle. Whether an individual classroom or schoolwide meeting, the daily Morning Meeting will set a positive, focused tone for all community members – students and staff alike. The Circle model used at IACA, adapted from the Valor Circle model developed and implemented by Valor Collegiate Academies, is a structured methodology where students and teachers build trust with face-to-face dialogue that helps create an optimal environment for learning.

By nurturing independence in students, we teach them to become problem solvers who seek fairness and justice. We foster compassion and respect, not only for others but for the self. IACA sees Restorative Justice as a complementary program reaffirming responsibility, self-worth, compassion, and justice. Restorative Justice, currently being implemented in schools across Florida, provides school leaders and teachers with collaborative solutions for selected disciplinary violations. It emphasizes repairing the harm caused by negative behavior using cooperative processes that include all stakeholders and involves students in designing and implementing disciplinary processes that take into account what's best for the student and the community. Each student's role as a member of the community is stressed, fostering a sense of belonging within a larger group, and they are able to learn from their mistakes. The structured face-to-face communication of Restorative Justice functions much like that in Circles; this overlap helps students and staff internalize the process and become more effective and authentic communicators. Given IACS's collaborative learning environment and focus on student-centered solutions, we see Restorative Justice as a natural fit that promotes student responsibility and strengthens the bonds of community between students and adults.

Effective classroom management techniques influence and provide an environment conducive to learning. Classroom management is expected to align with the core schoolwide behavioral expectations, climate and culture, and social/emotional framework. All teachers are expected to create an emotionally safe climate for learning, follow a consistent and fair process for responding to undesirable or inappropriate behaviors, monitor behavior continuously to support

student growth, and celebrate the prosocial behavior of students individually, as a class, grade level, and school community. School administration will meet with staff on an individual and group basis to assess their needs and seek input regarding the effectiveness of the school's social environment and overall health and wellness. It is our expectation that, when asked by a classroom visitor about classroom expectations, students within every class and grade level will be able to provide an age or student appropriate explanation of what the expectations are, what consequences are generally applied, and why the system is in place.

B. State whether the applicant intends to use the local school district's code of conduct policy. If the applicant does not intend to use the local school district's code of conduct policy, describe in detail the school's approach to student discipline. If already developed, provide the proposed discipline policy or student code of conduct as Attachment G. Taken together, the narrative and code of conduct (if provided) should:

- ***Explain the practices the school will use to promote discipline, including both penalties for infractions and incentives for positive behavior;***
- ***List and define the offenses for which students must (non-discretionary) and may (discretionary) be suspended or recommended to the local school district for expulsion;***
- ***Describe the roles of administrators, teachers, staff, and the governing board regarding the discipline policy;***
- ***Provide an explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings;***
- ***Describe procedures for due process when a student is suspended or recommended to the local school district for expulsion as a result of a violation, including a description of the appeals process that the school will employ for students facing recommended expulsion and a plan for providing services to students who are out of school for more than ten days; and***
- ***Explain the process for informing students and parents about their rights and responsibilities under the code of conduct.***

Code of Student Conduct

IACA will use the Marion County Public Schools Elementary Code of Student Conduct for students in kindergarten through grade five and the Secondary Code of Student Conduct for student in grades six through eight.

Teachers serve as the facilitators for guiding students toward ethical and respectful conduct and decision-making. They will be expected to have a classroom management plan aligned with the school's expectations and to provide a copy to the principal or designee annually. The plan must identify classroom expectations; steps taken to ensure teachers are guiding students toward positive outcomes; structures in place to respond to both undesirable and positive behavior; and how parents will be informed of classroom issues. The plans will support student ownership of their own social, emotional, and behavioral development.

When a student missteps, as children do when they are learning, the teacher refers to the classroom rules and the principles of respect, compassion and community that serve as the guidelines for conduct at IACA. Depending upon the age or grade level of the student and the

specific circumstances, many such incidents will be addressed through Circle. The teacher and student will take steps to address the behavior, bearing in mind that the overarching goal is for students to take responsibility for their actions and learn ways to prevent the behavior from occurring in the future. Consultation and communication efforts with students will be dedicated to modeling the appropriate responses, follow-up activities focused on behavioral change, and communication with others, including parents, to help shape behavior in a positive direction.

If possibilities for resolving a student's behavioral issues are exhausted at the classroom level, including a conference with both the student and the student's parent/guardian, or the behavioral offense is egregious in nature, then the student may be referred to the administration for assistance. The principal or designee will make a good faith effort to understand all issues related to the problem behavior and related circumstances. Any meetings with the principal will be conducted to serve as a learning opportunity for the student to implement a positive change in behavior. If there is sufficient information to suggest that a teacher may have been able to try different approaches, interventions, or respond differently to student behavior to promote a more positive outcome, the principal will meet privately with the teacher to determine any steps that can be implemented to help the teacher develop more effective skills or strategies, and document this communication accordingly. For students who experience intensive social, emotional, and/or behavioral challenges and whose needs are not being met through the implementation of the existing positive behavioral supports, strategies, and interventions in conjunction with the school's social and emotional learning program, a referral will be made to the individual student problem-solving team as described in Section 3.

The principal or designee will exercise professional judgment in determining consequences for a Code of Student Conduct violation, in accordance with MCPS policy. The descriptions of general and serious infractions outlined within the appropriate grade level Code of Student Conduct will be used to classify student misconduct. Violations are grouped into five categories: Primary, for student in kindergarten through grade two, and Level I, II, III, and IV for all other students.

School administration and teachers will preserve the integrity of the disciplinary process at the school. All staff will be expected to model effective empathy, responsibility, communication, collaboration, and respect. The principal or designee reserve the authority to suspend students as appropriate for egregious discipline offenses, or when all other means of positive behavioral support or the implementation of restorative practices have been exhausted. Parents will be notified of a disciplinary referral on the day of occurrence, either by sending a copy home or by making telephone contact or both.

We understand that charter schools may not withdraw or transfer a student involuntarily, unless the withdrawal or transfer is accomplished through established administrative procedures under present Board policy used by public schools. We also understand that the authority to expel students lies with the district and not with individual schools, including charter schools. We will follow MCPS procedures for recommendation of expulsion for a student exhibiting serious or repetitive violations of the Code of Student Conduct. Expulsion hearings will be conducted by MCPS and the final decision regarding expulsion will be made by the district School Board.

Discipline and Students with Disabilities

IACA understands that students with disabilities have specific disciplinary protections (i.e., procedural safeguards) that do not apply to nondisabled students. We will adhere to the

disciplinary procedures mandated by the Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act of 1973. The protections apply to exceptional education students with disabilities who have individual educational plans (IEPs) as well as students not yet determined eligible but for whom the school is deemed to have knowledge that the student may have a disability. The protections also apply to students with disabilities who are eligible for nondiscrimination protections under Section 504.

Specifically, school personnel and relevant members of the student's IEP team will convene whenever a student is being considered for suspension from school for disciplinary reasons for more than ten cumulative school days in a school year. If it is determined that the removal constitutes a change in placement under IDEA (i.e., the removal is for more than ten consecutive school days; the removal constitutes a pattern of exclusion as defined in the law), a manifestation determination review will be conducted within ten days of the removal decision. A manifestation determination is a process by which relevant members of the IEP/Section 504 team and the parent examine the relationship between the student's disability and a specific behavior that may result in disciplinary action. A meeting will be convened with the district representative, the parents, and relevant members of the IEP team to review all applicable information in the student's file, including any information supplied by the parents of the student, any teacher observations of the student, and the student's current IEP; and determine whether the conduct in question (1) was caused by, or had a direct and substantial relationship to, the student's disability or (2) was the direct result of failure to implement the IEP. If either are found to be the case, the student must be returned to the original placement and the school would take immediate steps to remedy any deficiencies in the IEP or its implementation.

Understanding that such a situation would be extremely rare and inconsistent with the school's philosophy of positive behavioral interventions and supports, if such a suspension were to be considered, we will work directly with the designated district ESE specialist to ensure compliance with federal, state, and district guidelines.

Section 9: Supplemental Programming

A. Describe any extra- and co-curricular activities or programming the school will offer, if applicable; how often they will occur; and how they will be funded.

Studies show there is a significant positive relationship between extracurricular activities and academic performance. Participation in these extra- and co-curricular activities correlates to higher grades, more positive attitudes toward school, increased self-esteem and advanced academic aspirations. In addition, these activities have the potential to reveal student passions, develop interests, and expand social and leadership skills. Our students will be encouraged to enhance their school experience by participating in extracurricular activities, arts, sports, and clubs.

At this time, we have not identified the specific co-curricular and extracurricular activities that will be offered, but once the school opens we will survey students, parents, and teachers to determine interests and then offer activities aligned with those interests to the extent feasible. The number of clubs and activities that will be offered each year is expected to grow as the school reaches full capacity.

Given the school's location close to the On Top of the World retirement community, we believe we will be able to recruit a strong team of volunteers with time, interests, and a desire to share their experiences with our students. We also hope to identify and collaborate with community organizations to support extracurricular programming.

We anticipate offering a range of clubs and other afterschool activities, including such things as chess, debate, dance, chorus, robotics, and drama. We also would like to offer options such as math club and Spanish club. Given the school's project-based approach, we anticipate that service learning projects may be an area of interest to expand upon work done in school. Sports and other recreational activities under consideration include cross country, track, volleyball, and basketball. Given the close proximity of the aquatic center under development, we also hope to be able to use the facility for lesson and recreational swimming.

The programs will be funded through student fees and/or fundraising efforts as well as operating funds once there is a budget surplus. When developing supplemental program opportunities, IACA will take into consideration the needs of families who may require financial assistance. The school will diligently work to eliminate unnecessary costs and build in assistance through scholarships or sliding fee structures so that all students have access to activities of interest. No student will be excluded due to the inability to pay associated fees.

II. ORGANIZATIONAL PLAN

Section 10: Governance

A. Describe the school's existing or planned legal status, including non-profit status and federal tax-exempt status

Ina A. Colen Academy will operate as a not-for-profit-Limited Liability Company pursuant to the provisions of the Florida Revised Limited Liability Company Act, Act and as permitted by section 1002.33(12)(i), F.S. It will derive its tax-exempt status from its sole member ("Member"), The Colen Family Charitable Trust, but will otherwise be a separate legal entity (s. 605.1103, F.S.; s. 301.7701-3(b)(1), Internal Revenue Code (I.R.C.) Therefore, IACA will be a separate legal entity and a nonprofit organization as required by ss. 1002.33(12)(i) and 1002.33(3)(a), F.S.

B. Provide the following documents, if available, as attachments:

- **The articles of incorporation for the applicant organization (or copies of the filing form) – Attachment H**
- **501(c)(3) tax exempt status determination letter (or copy of the filing form) – Attachment I**
- **Governing board by-laws – Attachment J**
- **Governing board code of ethics and conflict of interest policy – Attachment K**

The Articles of Organization, Operating Agreement and Bylaws, and proposed Code of Ethics and Conflict of Interest Policies are provided as Attachments H, J, and K, respectively. The Colen Family Charitable Trust application for recognition of Federal tax-exempt status (Form 1023) has been submitted to the Internal Revenue Service. A copy of the IRS tax-exempt determination letter will be provided to the District once it is received.

C. Describe the governance structure of the proposed school, including the primary roles, powers, and duties of the governing board; committee structure (if applicable); and how the board will interact with the principal/head of school and any advisory bodies.

IACA is governed by a governing Board of Managers (Board) which, in addition to holding the overall legal, financial, and fiduciary responsibility for the school, will provide external accountability, internal oversight and leadership. The Board will ensure that the standards and goals outlined in the charter are met and that IACA operates in compliance with all Florida state and federal laws. Board members will receive no salary or other compensation, other than reimbursement of expenses per Board approval that is consistent with applicable state and federal law. The primary role of the Board will be to govern IACA in a manner that enables the school to achieve its mission and vision and set forth the philosophies and values that guide school operations. The Board will hire and oversee the principal who will hold responsibility for day-to-day management and operations of the school. General Board duties and responsibilities will consist of those described in s. 1002.33(9), F.S. and include:

- Setting IACA vision, strategies and strategic goals; ensuring alignment to the district's educational priorities and performance measures; remaining accountable to MCPS for performance measures in the contract and to the Florida Department of Education and United States Department of Education for any applicable standards

- Remaining knowledgeable about the foundations of IACA and associated documentation, including the application; contract and any amendments; budgets, bylaws and relevant laws
- Hiring, supporting, and evaluating the principal; annually determining capacity of the school and holding school leadership accountable for achievement of the school's mission and goals
- Approving all policies and procedures used at the school (procurement authority, non-discriminatory hiring and retention, enrollment, etc.)
- Conducting financial reviews and maintain fiduciary oversight
- Adopting and maintaining an annual operating budget
- Adhering to Florida Government in the Sunshine Laws
- Setting the salary schedule; approving personnel recommendations from the principal
- Reviewing student discipline procedures and appeals
- Negotiating and executing all contracts
- Assuring compliance with Florida statutes and State Board of Education rules, FLDOE policies and procedures, applicable federal laws, and the terms of the charter contract
- Submitting required reports to the district in a timely manner
- Establishing annual and long-term goals for the school and evaluate progress
- Exercising continued oversight over charter school operations

In accordance with s.1002.33(9)(j), F.S., the Board also is responsible for:

- Establishing and maintaining internal controls
- Retaining the services of a certified public accountant or auditor for the annual financial audit, in accordance with the procedures in s. 218.391, F.S., who shall submit the report to the governing body
- Reviewing and approving the audit report, including audit findings and recommendations for the financial recovery plan in the event such a plan should become necessary
- Monitoring a corrective action plan or financial recovery plan, if required, in order to ensure compliance
- Participating in governance training approved by FLDOE, which must include Government in the Sunshine, conflicts of interest, ethics, and financial responsibility.

Pursuant to s. 1002.33(9)(p)2., F.S., the Board will appoint a representative to facilitate parental involvement, provide access to information, assist with questions and concerns, and resolve disputes. The representative will be a Marion County resident and will be a Board member, charter school employee, or individually contracted to represent the Board. The representative's contact information will be provided annually in writing to parents and posted prominently on the school website. The Board is not involved in handling the day-to-day of running the school, dealing with personnel issues, or addressing individual student needs.

The Board's role is one of oversight and management of the principal. Over time, the Board anticipates its functions to expand, moving from a school design and start-up phase to a more mature phase where ongoing operations, contract compliance, more complex budgets, and increased staffing and programs demand.

Committee Structure

A committee structure will enhance the Board's decision making, empowering the Board to partake in strategic, focused conversation and to maximize full Board meeting time. The committees will conduct research on critical issues, resulting in well-informed recommendations to the Board. The Board may establish and appoint members (board and non-board members) with varied expertise to such standing committees and/or ad hoc committees, per Board discretion, for the effective governing. Committees may include: Nominating, Finance, and Audit committee. Additional committees may be added as the need arises. The permitted activities and scope of each such committee are described in Section 6.13 of the Operating Agreement/Bylaws. Committee member terms shall be established upon appointment and shall be at least one year. Committee terms may be renewed. A chair for each committee will be appointed by the Board unless otherwise stipulated in the Operating Agreement/Bylaws.

Interaction with Principal/Advisory Bodies

The principal, hired by and reporting directly to the Board, is responsible for all aspects of daily school operations, including implementing policies adopted by the Board and ensuring the school is successful and performance goals are met. The principal identifies qualified candidates and makes hiring recommendations to the Board. All staff and faculty positions fall under the purview of the principal, and the principal is responsible for their evaluations. When an assistant principal is hired, some positions may report directly to that person. However, the principal will remain the designated authority. The principal is evaluated annually by the Board.
The principal is not a member of the Board, but attends all meetings, reports to the Board at regular intervals about school operations and presents recommendations on subjects under consideration prior to action taken, if requested. The principal also serves as the liaison between the school and the district.

Consistent with state charter school rules and policies, a School Advisory Council (SAC) will advise the Governing Board on policies relating to instructional and curricular concerns, budgetary priorities, community relations, and other issues identified by the Board. SAC membership will reflect an equitable balance between school employees, parents, and community members. The role of the SAC is strictly advisory.

D. State the frequency of board meetings and describe how the board will comply with open meetings and records laws.

The Board will meet monthly to discuss the school's operations and to hear reports and updates from the principal and the committees. As needed, the Board will consider and adopt policies and consider requests and concerns from parents, students, and teachers. Regular meetings will be held at the school in an accessible location. A quorum is required before the Board can take action; actions taken by the Board require a majority vote of a quorum of members in attendance. Workshop meetings may be called by any member and convened at any time between regularly scheduled meetings. Meetings and workshops will be open to the public and comply with s. 286.011, F.S. Parents will be provided with written notice regarding the process for attending and bringing matters to the attention of the Board. The Board will vote on and post their meeting schedule for the opening school year, and annually thereafter. The Board will ensure the School's principal or designee and the parent representative are present at all meetings.

E. Describe the current and desired size and composition of the governing board. Identify key skills, areas of expertise, and constituencies that are or will be represented on the governing board.

The Board currently consists of five highly educated, professional members with a mixture of corporate and educational experience (i.e., legal, construction, education, the medical field, and local government.). In accordance with its bylaws, the Board will consist of at least five but not more than seven members. This size will support well- functioning committees capable of accomplishing significant work in between meetings, while remaining a manageable size needed to reach consensus without excessive debate and time. Specific skills and areas of expertise of the current members are summarized in the attached Board Member Information Forms. The Board will regularly review the collective strengths and expertise of its members, with a focus on retaining expertise in the following areas: accounting; auditing; community service; curriculum development; education and teaching; educational leadership; fundraising; entrepreneurship; human resources; management; marketing; public relations; real estate; and strategic planning.

F. Describe how board members have been and will be selected including term limits and selection of officers.

IACA recruits Board members who are qualified, in terms of training, education, and experience, and who have garnered credibility and respect. Board members will be recruited as a seat becomes available based on a recommendation of the Nominating Committee as set forth in Section 6.13.2 of the Operating Agreement/Bylaws. Board membership shall be limited to three-year terms. The initial terms will be staggered so that only approximately a third of the terms will end each year. Previous board members shall be re-eligible for membership after a lapse of one year. The Board will choose officers from among its members to include a President, Treasurer, and Secretary and may also include one or more Vice Presidents. Officers shall be elected at each annual meeting and shall serve for one year and until their successors are elected and qualified.

G. Explain how this structure and composition will ensure that the school will be an academic, operational, and financial success.

All board members share and will continue to share a commitment to IACA's mission and vision as well as to the target population. Members hold the experience to establish policy consistent with the school's mission and ensure that programs and operations are faithful to the terms of the charter, including compliance with statutory and regulatory requirements. The Board contributes to the school's success through its initial leadership and ongoing operational oversight as it governs of all aspects of the school, including student academic performance, financial efficiency and school sustainability. Understanding that opening a school is a large undertaking, the rationale for the structure and composition is to have enough members to lead and form committees and share board responsibilities. Also, an ample number of members are needed to reflect desired diversity as well as expertise and experience needed to gather a range of perspectives to inspire innovation and maintain creative decision-making. The proposed size will be managed by an experienced Chair, well-organized agendas and board members that are prepared in advance of meetings with sufficient information.

Board members take seriously their fiduciary responsibility to oversee the school's expenditure of public and private funds, including oversight of procurement practices; monitoring business and financial policies; and providing guidelines for sound financial management practices. The

principal will work with the back-office services provider and Treasurer to develop and submit to the Board for discussion and approval a balanced annual budget prepared in accordance with the timelines set forth by the district. The Board will regularly review the budget in comparison to the actual spending and enrollment at key times each year, adjusting it as necessary throughout the year to provide clear direction to the principal regarding spending.

The Board will perform ongoing assessments of operations and programs to determine whether the school has met its stated goals and will also routinely assess its own performance. Through strategic planning, Board members will participate in the development of short and long-term goals for the school. The Board will report its progress annually to the district. This report will include: (1) school progress towards achieving the goals outlined in the charter; (2) information required in the Annual Accountability Report, pursuant to s. 1002.33(9)(k), F.S.; and (3) financial records, including revenues and expenditures. The Board will seek input from and communicate decisions to the community and will be fully accountable to the district and the community.

H. Complete the table below (add lines as necessary) and for each individual identified here provide 1) a completed and signed Board Member Information Form (template provided), and 2) resume.

Name	Current or Prospective Board Member?	Role on Board (e.g., Member; President)	Submission Requirements
Robert Colen	*Current*	*President*	☒ Information Sheet ☒ Résumé
Dr. Harvey Taub	*Current*	*Vice President*	☒ Information Sheet ☒ Résumé
Kay Fleisher	*Current*	*Secretary& Treasurer*	☒ Information Sheet ☒ Résumé
Dr. Mery Lossada	*Current*	*Member*	☒ Information Sheet ☒ Résumé
Janet Behnke	*Current*	*Member*	☒ Information Sheet ☒ Résumé

I. Describe the plans for board member recruitment and development, including the orientation process for new members and ongoing professional development to increase the capacity of the board.

IACA's board members have been recruited from a pool of local educational, business, and community leaders who seek to establish a highly successful public charter school in their community. The Board is working with the school community and other stakeholders to recruit interested and qualified applicants to fill remaining positions and any future vacancies. Vacancies will also be posted to the school website. Committees may also be used as a tool to develop future board member candidates. The process will ensure that the Board includes a diverse group of individuals with diverse perspectives and similar passion to the school.

Current board members will meet with potential members to share IACA's vision. Potential members interview with the Nominating Committee. Nominating Committee members will examine prospective members' qualifications, experience, skills, motivation, demeanor, and availability and verify references. As part of the nominating process, the Nominating Committee will also provide information to all potential candidates regarding the duties and responsibilities of charter school governing board members as well as the Code of Ethics and Conflict of Interest

Policy. Prior to making candidate recommendations to the Board, the Nominating Committee will provide a list of potential candidates and their respective background and biographical information to the Member for review and prior approval based on the criterion in the Operating Agreement/Bylaws. Candidates approved and provided by the Member will be recommended for appointment (if there is a vacancy) or for nomination during the next election period (if no vacancy). Once selected, members will undergo fingerprinting and background screening (within 30 days). All new members will participate in orientation to familiarize them with the mission, climate, and academic progress of the school. Orientation will include review of Florida charter school statutes, IACA's Board procedures and duties, Articles of Organization, Operating Agreement/By-laws, Code of Ethics and Conflict of Interest Policy, annual budget, staff and student handbooks, the most recent financial statements and summary of board member duties and responsibilities.

In compliance with FLDOE requirements, board members will participate in a four-hour long FLDOE-approved governance training in areas that include governance in the Sunshine Laws, conflicts of interest, ethics, and financial responsibility. Upon approval of the charter application, the founders will select a provider and training plan from FLDOE's approved list. The training will be completed within 90 days of approval for all founding Board members and within 90 days of a new member joining the Board. In addition, Board members will be required to complete a two-hour refresher course every three years, to be provided by an FLDOE-approved trainer. It is also our intent that one or more Board member(s) will attend the annual state charter school conference. Additional professional development to increase the capacity of the Board may include, but are not limited to: financial oversight, accountability, regulatory compliance, open meetings law, effective board communication, assessment, data-driven decision making, and strategic planning. In addition to these topics, a needs assessment will be part of the annual Board evaluation, through which the Board will identify additional training topics. Board members may also participate in seminars that are held to focus on a topic of special interest.

J. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest.

The Ina A. Colen Board will operate under a Code of Ethics and Conflict of Interest Policy that maintains the highest integrity and commitment to serving the students, school, and community, and expects all administrative, instructional, and support staff members to adhere to the Code of Ethics of the Education Profession in Florida and the Principles of Professional Conduct for the Education Profession in Florida ("Education Profession Code"). The Board's ethical standards and procedures for identifying and addressing conflicts of interest are provided in the proposed Conflict of Interest and Anti-Nepotism Policy (see Attachment K). All instructional personnel and school administrators will be required to complete training on the Education Profession Code.

K. Describe, if applicable, any school advisory bodies or councils that are in place or will be formed, including the roles and duties of each and the reporting structure of such entity relative to the school's governing board and leadership.

In accordance with 1001.452(1)(a), F.S., IACA will have a School Advisory Council (SAC). They will assist in the preparation and evaluation of the school's improvement plan and advise the Board on policies relating to instructional and curricular concerns, budgetary priorities, community relations, and other issues identified by the Board. The SAC will be composed of the

principal and an "appropriately balanced" number of teachers, support staff, students, parents, and members of the community. The SAC will report directly to the board.

L. Briefly explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school. The entire process or policy does not have to be developed; however, applicants should be able to articulate the primary steps.

IACA places high value on parental involvement and will strive to foster an open exchange of ideas and collaboration. Through regular communication with parents, we hope to create positive relationships built on mutual respect and a desire for student success. When disputes arise, we will seek an expeditious, amicable resolution for both parties.

IACA delineates steps for resolving disputes within its School Handbook and provides contact information for each staff member and the representative appointed by the Board in accordance with s. 1002.33(9)(p)2., F.S. (Board Liaison). Parents are encouraged to address their concerns in the following manner:

1. Make an appointment to clarify the concern with the student's teacher or other staff member with whom the parent is in dispute. The principal or AP may be present at any meeting between parties should either party request it.
2. If the teacher or other staff member is not able to resolve the dispute to the mutual satisfaction of both parties, the parent may meet with the AP to address the concern.
3. If the AP is not able to resolve the dispute to the mutual satisfaction of both parties, the parent may meet with the principal to address the concern.
4. If the principal is not able to resolve the dispute to the mutual satisfaction of both parties, the parent is directed to contact the Board Liaison, who will bring the concern to the Board. Issues brought to the Board are resolved by allowing ample time for investigation and full understanding of the issues by all Board members. However, emergency issues, or issues of great importance to the school's operation, may be resolved more expeditiously at the discretion of the Board.
5. The Board will discuss the facts in one or more meetings held in compliance with s. 286.011, F.S., and make a decision in response to the parent's dispute. The decision of the Board will be final.

If the school is filing the application in conjunction with a college, university, museum, educational institution, another non-profit organization or any other partner, provide the following information:

M. Name of the partner organization.

The Colen Family Charitable Trust ("Charitable Trust" or "Member"), which is the sole member of Ina A. Colen Academy, LLC.

N. Name of the contact person at the partner organization and that person's full contact information.

Rebecca Rogers, Executive Director
Colen Family Charitable Trust
8435 SW 80th Street, Suite 2
Ocala, FL 34481

(O) 352-387-7492
(C) 352-239-8144

O. A description of the nature and purpose of the school's partnership with the organization.

The mission of the Charitable Trust is to create and support educational initiatives that result in social and societal benefit for people within the community. One of the ways it intends to fulfill this mission is through its assistance and support to the school. As an operating foundation, the Charitable Trust must use its funds in its charitable activities (as opposed to providing grants). The IRS has determined that when an operating foundation is a sole member of a limited liability company engaged in charitable activities, the assistance and support provided to the LLC by the operating foundation will be considered part of the operating foundation's activities for tax purposes. Therefore, the school is organized as a limited liability company, with the Charitable Trust as its sole member. This allows the Charitable Trust to provide assistance and resources to the school such as operational and facilities support, while the school maintains itself as a separate legal entity and Board. The Charitable Trust has limited powers as described below.

P. An explanation of how the partner organization will be involved in the governance of the school.

The Member will not be involved in the governance of the school except as specifically set forth in the Articles of Organization and Operating Agreement/Bylaws. The Member's Executive Director will attend the Board of Managers' meetings, acting as a liaison between the Member and the Board of Managers and serving as a resource to the Board of Managers in carrying out their duties and responsibilities. The Executive Director will be an employee of the Member and will not be a member of the Board of Managers. The assistance provided to the Board of Managers by the Executive Director will be at the sole cost of the Member. The Member's limited authority includes approval of members of the Board, removal of members of the Board for cause, approval of any amendments to the Articles of Organization or Operating Agreement/Bylaws and receipt of financial information of the school necessary for completion of the Member's tax filings.

The Member has authority to remove a board member for cause if, in the reasonable judgement of the Member, a Manager (i) engages in fraud, embezzlement, or theft; or willful misconduct damaging to the Academy, its reputation, services, or students; (ii) violates any law or regulation relating to the Academy; (iii) engages in any intentional damage to Company's assets; (iv) engages in any unauthorized disclosure of any trade secret or confidential information of the Academy, Member or its students; (v) continually fails to perform duties owed to the Academy; (vi) is charged with a felony or a misdemeanor involving moral turpitude or act in any manner that would result in loss of background screening required by law for charter school board members; (vii) acts in a manner that is contrary to the derivative tax exempt status of the L.L.C. or the tax exempt status of the Member; (viii) acts inconsistently with the missions of the Academy or the Member; or (ix) fails to comply with the Summary of Board of Manager Duties and Responsibilities.

Section 11: Management and Staffing

A. Submit as Attachment M organization charts that show the school governance, management, and staffing structure in

- **The pre-operational year;**
- **The first year of school operations;**
- **At the end of the charter term; and**
- **When the school reaches full capacity, if in a year beyond the first charter term.**

Each organization chart should clearly delineate the roles and responsibilities of and lines of authority and reporting among the governing board, staff, and any related bodies (such as advisory bodies or parent or teacher councils), and any external organizations that will play a role in managing the school. The organization charts should also specifically document lines of authority and reporting within the school.

Organizational charts are provided in Attachment M.

B. Identify the principal or head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Provide specific evidence that demonstrates capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in. Discuss the evidence of the leader's ability to effectively serve the anticipated population. Also provide, as Attachment N, the proposed job description and resume for this individual.

--OR--

If no candidate has been identified, discuss the process and timeline for recruiting, selecting, and hiring the school leader. Describe the criteria to be used in selecting this leader, and provide as Attachment O the position's qualification requirements. What are the key skills and competencies for the school leader? What qualities must the school leader have for this school to be successful?

A principal has not yet been identified. The principal, selected by and accountable to the IACA Board, will implement the school's mission and vision, maintain high academic standards in curriculum, educational practices and student performance, and manage school facilities and finances, while creating a stable and nurturing school environment. The principal will also provide strong organizational and instructional leadership, in order to assure high student outcomes. The principal will at a minimum hold a master's degree and be able to take charge of academic programs and successfully implement them. He/she will be experienced in leading an organization and be a self-starter. The principal will be a competent and dedicated teacher with established classroom experience. The principal will understand and be willing to fulfill all duties and responsibilities as outlined in the proposed job description. Charter school experience is not required but highly preferred. The school will adhere to the anti-discrimination provisions of S. 1000.05, F.S. Attachment O. contains the position qualifications and more detail about criteria.

Process

IACA will recruit applicants through a public process, which may include, but will not be limited to, advertising in local and national newspapers and professional printed media, referral, and appropriate electronic recruitment mechanisms.

The principal must be approved by the Board. A fully assembled Board will review applications and resumes to determine which candidates will be interviewed, with a goal of interviewing at least three highly promising applicants. If a high number of applicants are interested, phone interviews will be conducted to solicit additional information before identifying candidates for face-to-face interviews. Board members will use a rubric to evaluate each applicant in designated areas believed essential to the school's success. The Board will comply with Florida's Sunshine Law at all times during the selection process. After discussion, the Board will vote to determine the final candidate; a simple majority is needed. If no candidate is acceptable, the process will begin again. The candidate must pass the required background checks and screenings prior to being appointed principal.

Student success, as shown in high student achievement both within the classroom and on student assessments, exists as one of the principal's top priorities. The principal will monitor student performance within the school and will keep abreast of educational trends throughout the nation, to continuously offer students the best chance for success both in the classroom and as a student in society.

At least annually, the principal will be evaluated by the Board in accordance with the Student Success Act. Specifically, charter schools must adhere to substantive requirements of section 1012.34, F.S., related to performance evaluations for School administrators' is considering using the Florida Consortium of Public Charter School's Instructional Leadership Performance Appraisal System to evaluate the principal. A final decision regarding the specific evaluation tool will be made by the Board closer to the school's opening.

Timeline

Recruiting for the principal will begin in October 2021. The position will be posted through multiple means as described above. Interviews will begin in mid-November. We anticipate having the selected candidate identified by mid-January and for the principal to begin working in February.

C. Describe the management structure of the school. As Attachment P provide job descriptions for each administrative or leadership position that identifies key roles, responsibilities, and accountability.

The Board will provide direct oversight to the principal. The principal will be in charge of all day to day operations and the oversight of all other employees and staff. As enrollment in IACA increases, an assistant principal will be hired. An office manager, who will report directly to the principal, will perform all the financial and bookkeeping aspects of running the school, including financial reporting, purchasing and contract management. In addition, a "back office" accounting firm will assist with the proper handling and posting of the accounts payable and financial reporting of the school's funds. Teachers will always be expected to fulfill the role of instructional leader. The principal will work closely with department chairs or lead teachers, who will be master teachers who represent their respective subject areas and support the administration in evaluating and verifying implementation of curriculum. They will also serve as

mentors, providing support to colleagues and new teachers. The teacher is the most critical link between the instructional program and the students. State certified teachers or individuals eligible for certification will be hired by and report directly to the principal. Individuals employed by the Board will have completed an extensive review to ensure they meet the standards of the school both in delivery of instruction and establishment of a strong SEL experience.

D. Provide a staffing plan for each year of the charter term that includes all anticipated personnel and is aligned with the school's projected enrollment and with all other sections of the application. Provide as Attachment Q the proposed job description and qualification requirements for the school's teachers.

Table 11.1 Projected Staffing Plan

Position	Y1	Y2	Y3	Y4	Y5
Enrollment (Classes)	**214 (11)**	**378 (19)**	**560 (28)**	**720 (36)**	**862 (49)**
Principal	1	1	1	1	1
Assistant Principal	0	0	1	1	1
K-5 Classroom Teachers	9	14	19	24	29
6-8 Classroom Teachers	2	5	9	12	14
ESE Teachers/Specialist	2	2	3	4	4
Gifted Teacher	.5	.5	1	1	1
ELL Coordinator/Specialist	0	1	2	2.5	3
School Counselor	1	2	2	2	2
Curriculum/Intervention Specialist	1	1	1	2	2
Business Manager	1	1	1	1	1
Registrar/Data Entry	1	1	1	1	1
School Nurse	0	1	1	1	1
Custodian (Day Porter)	1	2	3	3	3
Food Service Workers	1	2	2	2	3
Total Employees	**20.5**	**33.5**	**47**	**57.5**	**66**

E. Explain the school's plan for recruitment, selection, and development of a highly qualified and appropriately certified instructional staff that is aligned with applicable federal laws and state requirements as well as the school's design.

Employment practices will be nonsectarian and will adhere to the anti-discrimination provisions of the Florida Educational Equity Act and other applicable state and federal laws.

Recruitment

IACA will utilize education publications, job fairs, and state and national job boards to recruit the highest performing faculty, administration and staff. We are working with the Colen Family Charitable Trust Foundation to potentially establish a teacher institute in Marion County that would train teachers on developing their own SEL competencies and preparing them to implement SEL in the classroom. We will post job opportunities on the school's website, on Indeed, on LinkedIn, and/or Teachers-Teachers.com. The principal and other representatives will attend job fairs at state universities and notify state university Colleges of Education and university career centers of current job openings. Nearby teacher preparation programs will also assist in identifying potential candidates. We will recruit minority teachers and work to achieve a balance in staff that reflects our anticipated student population. The

principal will be responsible for the recruitment process. We believe that providing a salary and benefits package competitive with the district, in conjunction with a nurturing and innovative environment that fosters professional growth, will support teacher recruitment.

Selection

We will select employees who embrace the school's mission and are passionate about education. Interested applicants will apply directly to the principal. The strongest candidates will be contacted, and a telephone interview conducted. Applicants passing this initial screening will be invited for a face-to-face interview with the interview team. Following a more focused and comprehensive interview process by the hiring committee (e.g., school administrators, teachers, counselors, lead staff) and submission of a work sample (e.g., lesson plan, statement of educational philosophy), a "best fit" candidate will be identified. The selected applicant will be required to undergo a background check and fingerprinting with the District as required by 1002.33 (12) (g), F.S. prior to employment. When determined acceptable, a provisional offer of employment will be extended, pending final approval by the Board. The principal will submit the selected candidates to the Board for approval. Upon final approval from the principal and Board, the offer of employment will be confirmed. If the employee accepts the offer, a start date and employee contract will be issued.

We will not employ any individual whose professional certificate or license 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 must submit to background checks and drug-screening. IACA will adhere to the antidiscrimination provisions of s. 1000.05, Florida Statutes and federal and state laws in hiring and employment practices. We will not discriminate based on actual or perceived disability, gender, nationality, race or ethnicity, religion, age, or sexual orientation. IACA teachers will meet or exceed expectations for certification, as required by Chapter 1012 and Florida Statutes; teachers will be certified in the field in which they will be teaching. IACA will comply with all teacher/paraprofessional certification requirements of the Federal Every Student Succeeds Act (ESSA). Instructional staff from other states will have their teaching credentials evaluated by FLDOE to determine certification eligibility. Parents and the community will be informed of the qualifications of teachers, in accordance with ESSA guidelines and Florida Statutes. Staff retention will focus on providing a nurturing and challenging environment and offering competitive salaries and benefits comparable to surrounding School districts. Staff members will also contribute to the planning and operation of the School, under the direction of the principal.

Development

In setting high expectations for both students and teachers, IACA is committed to maintaining the highest level of instruction by implementing a comprehensive professional development plan that is discussed in Section 13.

Teachers play an important role in the lives of our students. In addition to facilitating learning, teachers are key agents of socialization, helping students reach their highest potential and develop into kind, compassionate and responsible citizens. Research from Penn State University and The Robert Wood Johnson Foundation found that teaching is one of the most stressful occupations in the U.S. Teacher stress impacts teacher health and well-being, work attitudes (e.g., job satisfaction), and turnover. High stress levels are causing teachers to leave their

profession, which causes instability among staff, students, and the community. The research identified four main sources of teacher stress:

- School Organization – Leadership, Climate and Culture: A supportive school culture, strong principal leadership and a collaborative collegial environment are associated with higher job satisfaction. Unsatisfactory relationships increase teacher stress, lower job satisfaction and lower commitment to students.
- Job Demands: Increased use of high-stakes testing at the state and district levels may be exacerbating the problem by limiting teachers' control over the content and pace of their work, managing students with behavior problems and working with difficult parents are other demanding interpersonal challenges that produce chronic stress.
- Work Resources – Support and Autonomy in Decision Making: When school leaders create opportunities for decision making and collaboration among teachers, they feel empowered and have higher satisfaction. Retaining high quality teachers means ensuring they have a voice in school-level decisions.
- Teachers' Personal Resources and Social-Emotional Competence (SEC): When high job demands and stress are combined with low social-emotional competence and classroom management skills, poor teacher performance and attrition increase. Teachers' own SEC and well-being are key factors influencing student and classroom outcomes. Yet few teachers have had training opportunities to attend to their own SEC. If teachers are unable to manage stress adequately, their instruction suffers, which impacts student well-being and achievement. In contrast, teachers with high SEC report more positive affect, greater principal support, higher job satisfaction, and a sense of personal accomplishment.

IACA seeks to develop not only our students, but our teachers and administrators as people. We believe that addressing all individuals social, emotional competencies will improve the culture of the school, reduce teacher stress, and increase teacher job satisfaction, which in turn increases student achievement. Training our teachers and administrators in the core competencies of SEC, will enable them to model them to their students and become embedded throughout everything that is done in the school. The teacher institute would be a vehicle where teachers and administrators could come to develop and improve their social and emotional competencies. We have an opportunity to develop our staff from the beginning and establish positive organizational supports and programs which can decrease stress and provide staff with necessary interventions to navigate situations where high stress might occur. Some examples of programs that we will initiate for teachers and staff include:

- Mindfulness. Mindfulness is state of active, open attention to the present moment. Being mindful means observing one's thoughts and feelings from a distance, without judging them as good or bad. It has been related to reducing teacher burnout, negative affect, sleep-related impairment, and daily physical stress symptoms.
- Teacher Mentoring. Providing technical and social support for newer teachers through orientation, guidance, supportive communication, time management, and behavior techniques has been proven to increase retention rates among teachers.
- School Workplace Wellness Promotion. Target lifestyle changes to reduce health risk behaviors and costs. The school may give a stipend to teachers for participating in a wellness program to encourage healthy lifestyle and stress reduction.

`Section 12: Human Resources and Employment

A. Explain the relationship that will exist between the school and its employees, including whether the employees will be at-will. Discuss the school's tentative plan regarding use of employment contracts. If the school will use contracts, explain the nature and purpose of the contracts. Use and nature of employment contracts may be finalized after application approval.

Each employee will be offered an annual, at-will contract for employment. The contract will specify salary, position, title, and job duties. At-will employees may terminate their employment at any time, with or without cause or advance notice; similarly, IACA may terminate employees' contracts at any time, with or without cause or advance notice. Procedures for discipline and dismissal of employees will be developed in accordance with principles of due process and in compliance with all applicable laws and regulations.

B. Provide the performance evaluation or a general outline of the performance evaluation plan, consistent with the substantive requirements included in s. 1012.34, F.S. (the Student Success Act), for administrators and instructional personnel including who will conduct the evaluations, what instrument will be used, and how the results will be used to guide performance and professional development. A final, detailed outline will be required after application approval.

In accordance with s. 1012.34, F.S., the performance of instructional personnel and administrators will be evaluated at least annually (twice annually for new teacher hires). The principal will be evaluated by Board or its designee (e.g., consultant services); teachers will be evaluated by the principal.

IACA will use the Florida Consortium of Public Charter Schools (FCPCS) Evaluation System for Classroom Teachers and Other Instructional Personnel and the FCPCS Evaluation System for School-Based Administrators. These systems were developed and copyrighted by FCPCS and are approved by the state for use by public charter schools and comply with section 1012.34, F.S. The evaluation systems meet all criteria and include the following components and characteristics:

- Support effective instruction and student learning growth
- Provide appropriate instruments, procedures, timely feedback, and criteria for continuous quality improvement of the professional skills of instructional personnel and school administrators
- Include a mechanism to examine performance data from multiple sources
- Identify those teaching fields for which special evaluation procedures and criteria are necessary
- Differentiate among four levels of performance as follows: highly effective; effective; needs improvement, or for instructional personnel in the first three years of employment who need improvement, developing; and unsatisfactory
- Provide training to ensure that all individuals with evaluation responsibilities understand the proper use of the evaluation criteria and procedures

The results of the evaluation and informal evaluations will be analyzed to identify schoolwide as well as individual areas of strength and need of improvement. These data will inform individuals' Professional Growth Plans as well as the school's professional development plan.

C. Provide the compensation structure or a general outline of the compensation structure for all employees, including salary ranges and employment benefits as well as any incentives or reward structures, if applicable. How will compensation and other components factor into the staff retention plan?

IACA will implement a performance salary schedule pursuant to 1012.22(1)(c), F.S., Annual adjustments will be given for teachers rated as highly effective and effective. We will use the Marion County salary schedule as a basis for establishing our guide. Salary ranges for instructional personnel range between $39,050 and $60,500. For budgeting purposes, we used $45,000 as an average of the predicted range of teachers we will have. We will give additional pay to team leaders, and the board will develop a policy aligned with statute for the Best and Brightest performance pay program. We have built in 1.875% annual raises for staff and a 3% retirement contribution. IACA will pay approximately $3,600 towards health insurance. Actual annual raises will be dependent on employee performance pursuant to the performance pay scale.

Knowing that teacher attrition is a significant concern in Florida as well as nationally, we appreciate the importance of attracting and retaining high quality teachers. Research and evaluative studies have consistently linked higher levels of student achievement with lower rates of teacher turnover, higher levels of teacher satisfaction with their school environment, and a positive learning community where teachers feel valued and supported.[30] Therefore, at IACA, efforts to retain highly effective staff efforts go beyond compensation. As described elsewhere in application, the IACA culture is designed to encourage equity of voice and a sense of ownership and empowerment for all staff members. Our focus on Social and Emotional Learning includes the adults in the building. We want our staff to take care of themselves and will encourage and allow them to do so. Project based learning has been demonstrated to motivate not only students but also teachers. Lastly, retention will also be fostered by the level of staff involvement in the school under the direction of the principal (e.g., teacher input, leadership opportunities and participation in program planning, data analysis, problem solving, etc.).

D. Outline the school's procedures for hiring and dismissing school personnel, including conducting criminal background checks.

Staff will be recruited and hired utilizing the procedures described in Section 11. Applicants must submit 3 business references, including the most recent direct supervisor. In addition, all employees must be fingerprinted and cleared by the district's School Board of Marion County per ss. 1012.32 and 1012.56, F.S., before the hiring process can be completed. All fingerprinting and background screening appointments are made via the district website.

Some of the most common circumstances for employment termination include the following:

- Resignation – Voluntary employment termination initiated by an employee
- Discharge – Involuntary employment termination initiated by the organization
- Layoff – Involuntary employment termination initiated by the organization for non-disciplinary reasons
- Retirement – Voluntary employment termination initiated by employee

An exit interview will be conducted by the school's administration. The exit interview allows for discussion of employee benefits, conversion privileges, repayment of any outstanding debt, and

[30] http://www.p12.nysed.gov/specialed/publications/persprep/qualityteachers/together.htm

return of school property. It also allows the opportunity to voice opinions or concerns, questions, or provide suggestions, or recommendations.

E. If personnel policies have been developed, include as Attachment R. If personnel policies and procedures have not been developed provide a clear plan, including timeline, for the development and approval by governing board.

Personnel policies have not yet been developed. A plan and timeline for development is provided as Attachment R.

F. Explain how the governing board and school leadership would handle unsatisfactory leadership, teacher, or staff performance, as well as leadership or teacher turnover.

As stated above, the Board will hold direct responsibility for supervision of the principal and will use the FCPCS evaluation instrument to conduct annual evaluation(s) along with reviewing accomplishment of the principal's goals and the level of student achievement (schoolwide and for each subgroup). At least quarterly, the principal will provide the Board with documentation on the status of goal accomplishment and the level of student achievement. Following a designated time for improvement, which may include implementation of a corrective action plan, if satisfactory performance is not reached the principal will be terminated by the Board. In the case of principal termination or any other reason for turnover, an acting principal will be named by the Board until a new principal is hired.

IACA will use progressive discipline when dealing with job-related behavior that does not meet expected and communicated performance standards. Progressive discipline will assist the employee in understanding that a performance problem or opportunity for improvement exists, and in identifying resources (e.g., coaching; professional learning opportunities) the employee can access. It is based on a foundation of good leadership and fair supervision. Progressive discipline allows for most concerns to be corrected early, benefiting employees and the school.

It is in IACA's best interest to ensure all employees are treated fairly and disciplinary actions are prompt, uniform, and impartial. The purpose of disciplinary action is to correct the problem, prevent recurrence, and prepare the employee for satisfactory performance in the future. Actions may include verbal warning, written warning, suspension with or without pay, or termination of employment. The action depends on the severity of the problem and the number of occurrences. With respect to most concerns, the following will apply: a first offense may call for a verbal warning; a next offense may be followed by a written warning; another offense may lead to a suspension; and, still another offense may then lead to termination of employment.

In the case of unsatisfactory performance by a teacher or other staff member that is not corrected, the principal will be responsible for following documentation and termination procedures. Regarding teacher turnover, the principal will proactively conduct marketing activities for attracting high quality teachers. The principal will cultivate relationships with colleges and universities that offer teacher education programs and participate in job fairs to the maximum extent possible. IACA will maintain instructional staff recruitment and employment information on its web page throughout each school year. If a teacher leaves during the school year, the school will immediately seek to recruit a highly qualified replacement. In addition, the school will establish a pipeline of approved teacher applicants to expedite the hiring process to address unexpected turnover.

Section 13: Professional Development

A. Describe the school's professional development expectations and opportunities for administrators and instructional personnel, including the following:

1. *Identify the person or position responsible for overseeing professional development activities.*
2. *Discuss the core components of professional development and how these components will support effective implementation of the educational program. Discuss the extent to which professional development will be conducted internally or externally and will be individualized or uniform. Describe how the effectiveness of professional development will be evaluated.*
3. *Describe any professional development that will take place prior to school opening. What will be covered during this induction period? How will instructional personnel be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods?*
4. *Describe the expected number of days or hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan. Include time scheduled for common planning or collaboration and how such time will typically be used.*

IACA is committed to the professional development (PD) and growth of its administrators and staff. We have aligned our professional development with the FLDOE Professional Development System Protocol which fulfills the requirements of 1012.98 F.S. We are committed to increasing student achievement, enhancing classroom instructional strategies that promote rigor and relevance throughout the curriculum, and preparing students for continuing education in the workforce. We understand that starting a new school means creating an entirely new community and building a culture of professionals. Teachers will come to us from many different kinds of schools; some will have extensive experience; others very little. While we actively seek out and recruit a school leader and instructional staff who are experienced in the specific components of our educational program, we understand that not all teachers will have specific experience or skills in these areas. A differentiated approach to PD will be required to supplement the schoolwide training required of all staff. Because social and emotional learning is one of the key tenants of our educational program, it is critical that our entire team be trained and build their own personal SEL competencies. While we will use a SEL "curriculum" for students, the competencies will be integrated within all of the academic areas and it is critical that all of the staff model those competencies every day.

Person Responsible

The Principal will be responsible for overseeing and guiding professional learning activities. He or she will be expected to develop and implement a professional development plan that:

- is designed to improve teacher effectiveness as measured by improved student outcomes;
- is evidence-based and aligns with the CASEL core competencies;
- is job-embedded, ensuring time for teachers to collaborate with colleagues to plan for classroom implementation;
- is teacher-driven and provide hands-on strategies applicable to the classroom and will encourage active participation by teachers;

- is differentiated based on teachers' previous experiences, demonstrated areas for growth, student age-group, and content area;
- provides opportunities for staff to give feedback on the quality of their learning; and
- provides knowledgeable and engaging trainers who are responsive to feedback.

Core Components

The core focus of professional development will be SEL for educators and administrators. Investing in the staff benefits not only every student they teach, but also every colleague and parent they work with. The best teachers are learners, and act as role models for the SEL skills they want to see in their students. These SEL skills and competencies will serve as the foundation and establish the culture for the school.

Prior to school opening, we will be identifying and developing high-quality content curriculum professional development. Through our partnership with the Colen Family Charitable Trust Foundation we may collaborate with The Collaborative for Academic, Social, and Emotional Learning (CASEL) and the Collaborating States Initiative (CSI) to access their national database of relevant professional development content and tools to support our effort. We have also established a relationship with Valor Collegiate Academy on creating a cohort of teachers to attend their Compass camp.

The SEL professional development will be developed by field experts and grounded in CASEL's five core competencies, with the addition of equity and mental health strands that will comply with s. 1012.584, F.S., and Rule 6A-1.094121, F.A.C. The PD is designed to provide staff with efficient, targeted instruction on the elements and indicators of each competency. Each module includes an introduction to promote teacher commitment, direct content instruction, direct skill assessment, and practical and targeted application of skills with different learners, peer groups, and parents.

Competency-Aligned Modules

Awareness of Self & Others	Self-Management	Social Skills	Social Awareness	Self-Care
Self-Knowledge	Self-Control	Fairness	Cultural Competence	Mindfulness
Emotions	Stress Management	Respect	Empathy	Self-Efficacy
Values	Focus	Friendship	Safe & Ethical Behavior	Optimism
Wants & Needs	Problem Solving	Relationships	Support Systems	Self-Compassion
Learning Skills	Goal Setting	Cooperation	Social Contributions	Self-Advocacy
Growth Mindset	Resilience	Conflict Resolution	Actions & Consequences	Healthy Boundaries

Topical Strands

Mental Health	SEL & Equity
Bullying Prevention	Culturally Responsive Teaching
Suicide Prevention	Addressing Injustice
Anxiety	Leveraging SEL to Promote Equity
Depression	The Impact of Implicit Biases

During the first year, we will contract with vendors for a significant part of the SEL professional development. We are looking to train all of the staff on the RULER method, as well as bringing in experts from CASEL to do the above-mentioned modules. The consultant for the school is a member of the Collaborating States Initiative (CSI) whose purpose is to help state education agencies create statewide conditions that will encourage and equp educators at the district and school level to promote integrated, equity-focused, academic, social, and emotional learning. She has worked with North Carolina, Washington, California, and Iowa on developing educator PD that is relevant and builds capacity with staff.

In the first two or three years we anticipate that the majority of the PD will be uniform across all staff members as the foundational knowledge and skills required to implement the educational program are established. In year 3 and beyond, we expect approximately half of the PD activities will be uniform and the other half will be individualized based on identified areas of need or related interests.

Evaluating Professional Development

Professional development is the process of continuous development for educators and other personnel is focused on improving student achievement. The process for evaluating PD will ultimately be tied to whether or not the teachers applied what they learned in the classroom and there were improvements in student learning as a direct outcome.

The process leading to evaluation will follow the structure of Protocol Standards- Planning, Delivery, Follow-Up and Evaluation. A needs assessment will be conducted at the beginning of each school year and opportunities for PD will be identified. Schoolwide data (e.g., student academic achievement; discipline data; student survey results) will be analyzed to identify topics for which targeted staff training may be warranted. The principal, with the support of selected teachers and staff, will analyze the data, establish goals and targets, and plan PD.

The principal will meet with each teacher to develop an Individual Professional Development Plan, (IPDP) that takes into consideration the individual's current needs based on the unique components of the school's educational program; self-identification of areas for professional growth; certification status (e.g., hours needed to renew certification, upgrade from temporary to professional certification, add an endorsement). Goals will be designed to assess both effort (i.e., the amount and type of learning opportunities engaged in) and effect (i.e., extent to which the teacher's behavior reflected the content that was taught (e.g., implementation of specific instructional or assessment strategies) and student outcomes were improved)

A mid-year review will be held to promote discussion and reflection, and to monitor progress toward the goal using formal and/or informal data. Evaluations will be completed at the end of each PD activity that will inform the quality and effectiveness of each activity.

At the end of the year, an evaluation of the IPDP will be held with each teacher to evaluate the degree of fidelity the IPDP was implemented, the impact of the changes in Educator practices, the degree to which the professional learning contributed to student performance gains, and use the results of the evaluation as a part of the continuous improvement process.

Pre-Opening Professional Development

It will be of critical importance that the entire faculty completely understands the unique program offered by IACA. In order to accommodate all of the necessary topics prior to school opening, we will be providing two full weeks of PD for all staff so that everyone understands

and is prepared to implement the educational program. Professional learning for all staff may include:

- Social and Emotional Learning (SEL) – SEL refers to evidence-based practices informed by rigorous, systematic social science that underscore the way we understand, use, and manage our time, and countless other processes that impact how students and teachers show up in the classroom. SEL programs cultivate the development of five interrelated sets of cognitive, affective, and behavioral competencies; self-awareness, self-management, social awareness, relationship skills, and responsible decision making. These competencies underscore the capacity to learn, develop, and maintain mutually supportive relationships, and be healthy, physically and psychology.
- RULER Institute – Supported by the Yale Center for Emotional Intelligence. The institute introduces participants to the RULER skills and the Anchor tools, including how they may create a supportive and caring school climate while also teaching emotional intelligence to students and adults. Administrator will attend with at least 2 teachers prior to school opening. That team will serve as lead trainers for school staff with support from RULER coaches.
- Team Building – All staff will participate in True Colors or Myers-Briggs or SuperStrong assessment to learn about themselves and others. This will also be done with students to better understand learning styles, interests, and develop a common language for describing similarities and differences.
- Project-Based Learning – Effective PBL requires more than an occasional classroom project. Participants will gain a deeper understanding about what is a project, essential elements of PBL, making connections across the curriculum, identifying the "big" ideas of their subject area, planning PBL in the classroom, and changing the role of the teacher.
- Data-Driven Decision Making – Developing meaningful assessments and checkpoints are critical in achieving effective data-driven decision making. Training to ensure staff understands the purpose of formative and summative assessments; development of data compilation to review and ensure instructional practice is responsive to the needs of the learners.
- Reading in the Content Areas – Content area teachers will support reading and writing instruction. Training will equip them with the skills needed for schoolwide implementation and develop a deeper understanding of the tools and content practices that will be most effective.
- Curriculum-Specific – Grade group teams for kindergarten through grade three and grades four through six to focus on curriculum specific PD related to instructional materials and develop lesson outlines for first two weeks of school.
- Differentiated Instruction – This training will demonstrate and reinforce ways to differentiate and individualize lessons and tutorials to increase student learning and maximize instructional time.

- MTSS/RtI – Training will focus on the practice of providing high-quality instruction and interventions matched to student needs using learning rate over time and level of performance to make instructional decisions. The four components of the problem-solving process will be covered. The principal, school counselors, and teachers will learn to analyze, extrapolate and disaggregate school data from a variety of sources and to use this data to create effective school improvement plans to increase student achievement.
- Safety and Security – Aligned with the Marjory Stoneman Safety Act. Safety and security training will instruct staff on daily safety procedures; protecting the school and students; and preventing and handling emergency situations as defined in the crisis plan (Active Assailant Response Plan). Each staff member will complete the required modules to receive a certificate.
- Mental and Emotional Health Education – Aligned with s. 1012.584 F.S., which includes an overview of mental illnesses and substance use disorders, and the need to reduce the stigma of mental illness; information on the potential risk factors and warning signs of emotional disturbance, mental illness, or substance use disorders, and information on how to engage at-risk students with the skills, resources, and knowledge required to assess the situation, and how to identify and encourage them to use appropriate professional help.

On-Going Professional Development

The topics listed above are critical to ensuring our teachers are prepared to implement the school's innovative program beginning day one in a safe and secure environment. As needed, each of these topics will be revisited throughout the year and in subsequent years as new staff are hired. In addition, the following topics will be addressed through professional learning communities (PLCs) and regularly scheduled PD sessions throughout the school year:

- Universal designs for learning (UDL)
- Formative assessment
- Implementation of student success chats as part of the early warning system (EWS)
- ESE procedures and compliance; strategies and accommodations for students with disabilities; developing quality IEPs (ESE Specialist)
- Meeting the needs of English language learners (ELL)
- Positive behavioral interventions and supports and classroom management

In addition to the training topics described here, administrative support staff will receive training in all processes and procedures necessary to ensure smooth operation of the school (e.g., registration process, data entry). A minimum of one day per month is set aside for vertical collaboration during which professional learning communities (PLCs) will be implemented. One outcome of the PLCs is that subject area teachers will share best practices, work on incorporating effective strategies, and ensure there are common expectations across grade levels.

Professional Development Plan

We will follow the Marion County School District calendar for professional days during the school year. The calendar has 6 early release days for teacher Inservice and 4 teacher workdays. All of those will have scheduled time for professional development. All teachers will be

required to complete a professional growth plan which will become part of the annual employee performance evaluation. Other aspects of the IACA PD plan include:

- Teachers new to the profession will be assigned a teacher mentor from the staff who is experienced in the area where the new teacher is assigned. If no appropriate mentors are available, we will work to establish a partnership with a college or university, and collaborate with the office of candidate services, clinical experiences, and partnerships to identify qualified mentors.
- We will meet monthly by grade levels in professional learning communities in order to develop projects, review data, and plan themes for the next month. They will also have dedicated time to plan vertically and horizontally by subject area.
- Teachers will have opportunities to attend off-campus conferences and trainings and return to share their findings with the faculty.
- Teachers will participate in an evaluation survey after each professional learning event and participants will be asked to write reflections about their participation.

Administrators will be encouraged to participate in the following PD trainings and conferences:

- Florida Annual State Charter School Conference – Administrators may attend this state conference. If the school applies for and is awarded a federally funded Charter Schools Program (CSP) grant, attendance is required.
- RULER Institute- Supported by the Yale Center for Emotional Intelligence. The institute introduces participants to the RULER skills and the Anchor tools, including how they may create a supportive and caring school climate while also teaching emotional intelligence to students and adults. Administrators are encouraged to attend as a team with at least two teachers.
- Formal Observation Training – Training provided by the Florida Consortium of Public Charter Schools (FCPCS) that is aligned with the teacher evaluation system/process; FCPCS has online modules for administrators as well as procedural handbooks and detailed evaluation rubrics that have been approved by FLDOE.
- Classroom Walk-through Training – Provides strategies and tools to effectively structure classroom visits and follow-up reflections. The process provides a powerful strategy for increasing student achievement; a strategy for classroom visits that focusses 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 and Board Members – 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.

Section 14: Student Recruitment and Enrollment

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

The Board recognizes the importance of ensuring marketing and recruiting efforts extend to all families who may be interested in participating in the educational choice provided by IACA. To promote a neighborhood school environment, our marketing strategy is focused on the Calesa development and surrounding area. Outreach efforts will be made throughout the community to inform families of with potential students and community members about the innovative and unique programming that will be offered at the school. We will market to historically underrepresented groups who might benefit from our program but may not be familiar with charter schools, including families in poverty, English language learners, and students with disabilities. Recruitment materials will cite the school's vison and mission, provide a description of the educational program, including supports for struggling students, and explicitly state the school's commitment to serving all students, including students with disabilities and English language learners. The recruitment strategy is broken into four phases.

Phase I: Identification: We anticipate that the majority of the school's population will come from Calesa and the surrounding area. Addendum FF provides demographic information about students currently attending schools in this general area. Using this information as a starting point, the Board will conduct a thorough analysis to determine target recruitment areas that will support the school's goal of enrolling a student population reflective of the diversity of the target area.

Phase II: Awareness: Beginning approximately one year prior to school opening, or upon approval of this charter application, we will conduct a targeted marketing campaign to educate the community about charter schools and the opportunities and benefits available at IACA. Publications and media will reflect the local community, including use of multiple languages, as needed. These efforts will include, but not be limited to:

- Development of a school website and social media account(s) (e.g. Facebook and Twitter)
- Distribution throughout the community of brochures and flyers about the school and its innovative educational program
- Periodic press releases documenting progress (e.g., approval/awarding of a charter contract; ground breaking; completion of facility)

Phase III: Recruitment: Rigorous student recruitment activities will continue until IACA is fully enrolled and beyond. Our marketing strategy will include, but not be limited to:

- Town hall meetings (informational sessions) at locations throughout the community held at different times of the day and week to accommodate families' work schedules
- Once the school is operating, open houses held at the school
- Media outreach, including targeted direct mail, newspaper and cable TV ads, and press releases

- Continued distribution throughout the local area of brochures and flyers describing IACA and programs offered
- Attendance by board members and staff at community events

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

IACA is committed to enrolling a diverse student population and shall abide by the provisions in the Florida Educational Equity Act (section 1000.05(2)(a)) and other state and federal nondiscrimination laws. IACA shall not discriminate on the basis of race, national origin, gender, gender identity, sexual orientation, marital status, age, ethnicity, or disability. Strategies to address "hard to reach" populations will include, but not be limited to the following:

- Production of marketing materials and school applications in languages other than English (e.g., Spanish) if applicable to accommodate community needs
- Availability of bilingual staff or volunteers to answer questions
- Enrollment applications in multiple languages via the website
- Posting of information in public areas frequented by a cross section of the community, such as early childhood centers; health clinics; civic or cultural groups; centers of worship and other faith-based organizations; libraries; and local businesses, shopping centers, and community agencies
- Advertising in local magazines and newspapers, including free community publications
- Distribution of information to local businesses' human resource departments
- Advertising information sessions in a variety of locations and languages

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

Pursuant to section 1022.33(10)(b), IACA shall enroll an eligible student who submits an application prior to the posted deadline, unless the number of applications exceed the capacity of a program, class, grade level or building. In such cases, all applicants shall have an equal chance of being admitted through a random selection process. In accordance with s. 1002.33(10)(d), F.S., IACA will give enrollment preference to the following populations:

- currently enrolled students;
- students who are siblings of a student enrolled in the charter school;
- students who are the children of a member of the governing board of the charter school;
- students who are the children of an employee of the charter school;
- students who have successfully completed a voluntary prekindergarten education program provided by the charter school or the charter school's governing board during the previous year;
- students who are the children of an active duty member of any branch of the United States Armed Forces; and,
- students who attended or are assigned to failing schools pursuant to s. 1002.38(2).

IACA intends to limit its enrollment process to target students residing within a reasonable distance of the school (e.g., within four miles) as allowable under s. 1002.33(10)(e)4., F.S.

In addition the school anticipates implementing the limitation applicable to students living in a development in which a business entity provides the school facility and related property having an appraised value of at least $5 million to be used as a charter school to mitigate the educational impact created by the development of residential dwelling units as allowable under s. 1002.33(10)(e)7., F.S. In this case, students living in the development shall be entitled to up to 50 percent of the student stations in the charter school.

In addition, if available, the school intends to apply for a federally funded Charter School Program (CSP) Grant administered by the Florida Department of Education. If awarded, for the period of the grant the school will limit enrollment preferences to those allowable under the applicable federal guidelines.

Applications will be made available through an online student registration system such as Lotterease. Information collected through the system will mirror the draft paper form provided as Attachment S. Assistance will be provided to ensure the online system is not a barrier to completing the application itself or a hardcopy will be made available. Applications are accepted on an ongoing basis and maintained on a waiting list. The waiting list is closed at the end of the school year; new students seeking to enroll the next school year must submit a new application. The system will manage all aspects of the enrollment process including the online application, application verification, sibling applicant record linking, admission preference management, manual and computerized lottery options, wait-list management, data exports (e.g., mail merges), and statistical reporting. Upon receipt of an application, the student's grade of enrollment is reviewed to verify eligibility. If there is an over subscription for any grade level at the end of the open enrollment period, a lottery will be conducted. Out-of-county students will be accepted if there are seats available after all eligible Marion County residents are enrolled.

All accepted applicants will be provided with written registration requirements that include a detailed list of the documentation required by MCPS in accordance with its Student Progression Plan. Once all students are registered and classes have been assigned, class size will determine the need for a subsequent acceptance period and/or marketing effort. At each phase of the admission process, appropriate correspondence will be generated and communicated to each applicant. The tentative timetable below will be used for registering and admitting students, including a lottery if the number of applicants exceeds the program capacity.

Application and Enrollment Schedule

Activity	Timeline
Year 1	
Applications Submitted	November – Ongoing
Notification of Acceptance (Lottery if Required)	February
Registration	March – Ongoing
Second Acceptance Window (Lottery if Required)	April
Year 2 and Ongoing	
Applications Submitted	Ongoing
Recommit Letters – Current Students	January
Notification of Acceptance (Lottery if Required)	February
Registration	March – Ongoing
Second Acceptance Window (Lottery if Required)	April

Section 15: Parent and Community Involvement

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

We believe that parent engagement is critical to the IACA mission and vision. We will encourage families to be active members of the "IACA team," thereby fostering a strong sense of community within the school. To facilitate communication and collaboration between school and home, parent-teacher conferences will be held at least two times per year. Use of an electronic parent portal will be used to ensure parents have access to most current information about their child. It is our understanding that MCPS uses Skyward for this purpose. Through the charter contract process we intend to address the possibility of IACA working with the district and the vendor to utilize a "piggyback" contract to utilize this same parent portal.

As described throughout the application, our goal is for IACA to be a truly community-based school. Community partnerships provide students the opportunity to engage with and learn in the world outside the traditional classroom and help students understand their place in the larger community. IACA will seek partnerships with community organizations and local businesses. We will create a Business Partners program and will identify our community and business partners with a link or advertisement on our website. We also will actively recruit volunteers from the nearby retirement community. Each of these groups bring with them a wealth of knowledge and experience, and the opportunities for multigenerational relationships will benefit both students and adults. Community partners and neighborhood volunteers will be invited to participate in the activities of the school, including participating in in project-based learning activities and be trained as mentors and tutors.

The following are examples of ways family members and community volunteers can support the school:

- Assisting with the arts programs
- Volunteering in the classroom
- Volunteering/chaperoning at school functions and field trips
- Volunteering/sponsoring academic endeavors/competitions that support the curriculum
- Reading with students
- Media center organization and operations assistance
- Assisting teachers with photocopies and other preparations
- School beautification projects
- Helping with fundraisers
- Serving on committees

In addition to recruiting family support for school and classroom activities, we will offer a variety of informative and educational programs to support family members as well. Specific

topics of interest will be solicited from parents as well as generated by teachers and school leaders based on their experiences and information gleaned from families.

Family orientation will be held at the start of each school year to provide a comprehensive overview of the educational program and the Compass model. The session will set the stage for engaging families in the IACA culture, building trust, and recognizing a common mission. School open houses showcasing student projects and activities will be held throughout the year.

IACA will sponsor a parent teacher organization (PTO) or family advisory council as one method for keeping families connected, engaged, and informed. The organization will provide a platform for parents to express their opinions, share their ideas, and impact their child's education. In addition, parent surveys will be distributed annually to parents, to monitor general parent opinion and satisfaction with the school program. Results of that survey will be included in the Annual Report and will be distributed to all parents.

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

Although formal partnerships have not yet been established, we intend to enter into relationships with local organizations. Master the Possibilities (MTP), a not-for-profit lifelong learning center that provides instruction and learning experiences for adults in the area, is one such entity. Activities may include instructors or adult students from MTP working with IACA students or providing access to MTP resources for our parents.

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

A report addressing forecasted student demand resulting from the buildout is provided as Attachment T.

III. BUSINESS PLAN

Section 16: Facilities

If the site is acquired:

A. Describe the proposed facility, including location, size, and layout of space.

IACA will be located adjacent to Calesa, a planned community encompassing more than 1500 acres fronting SW 80th Avenue to the west and SW 38th Street to the north in Ocala, Florida. The building itself will be designed specifically for project-based learning, which requires larger spaces than more traditional approaches. Successful PBL occurs in physical spaces specifically designed with an eye toward flexibility and the promotion of creativity and collaboration. To accommodate this, our plans anticipate approximately 75 square feet per student for the completed facility. A phased build-out approach will be used as student enrollment is expected to increase from 214 students (11 classrooms) in year 1 to 982 students (49 classrooms) at full enrollment in Year 6.

The school will be a single story structure in a horseshoe layout with an interior courtyard. Regular classrooms will be up to 800 square feet with large windows for ample natural light. Exterior walls of several classrooms will include garage door type openings to connect indoor classroom space to the outdoors. Ceilings will be exposed super-structure with sound-deadening panels to ensure good acoustics. The facility will include a gymnasium and a cafetorium with a stage as well as skills labs; an exceptional student education (ESE) room; art, music, band, and chorus rooms; a science lab; a maker space/exploration lab; media center with production lab; and, administrative space, including offices, a conference room, and a clinic area.

B. Describe the actions that will be taken to ensure the facility is in compliance with applicable laws, regulations, and policies and is ready for the school's opening.

All design is being completed by registered professional pre-approved design firms with education/instructional backgrounds that have prior experience in this field of construction and will ensure compliance with all applicable laws and regulations. All work will be permitted, reviewed, and approved by the Marion County Building Department and the local Fire Marshal for code compliance. Design drawing development is currently in process. With a scheduled opening in August 2022, we have allowed ample time for the horizontal and vertical developed required for the facility to be completed prior to the 2022-23 school year.

C. Describe how the facility aligns with the proposed educational program and other requirements such as mandated class sizes.

The planned size based on 75 square feet per student is larger than many typical schools and provides ample space for 18 students per class in kindergarten through grade three and 22 students per class in grades four through eight. The building itself is designed to accommodate and support the school's collaborative project based program. Examples of the type of functionality recommended for PBL[31] that we intend to incorporate into the IACA facility include such things as:

- A "wow space" commons room for formal and informal gatherings
- Teaching neighborhoods for integrated curriculum delivery

[31] David Stephen. New Vista Design. www.newvistadesign.net

- Movable walls between teaming teachers/classrooms
- Shared teacher offices and workspaces
- Highly flexible, multi-purpose room(s)
- Ubiquitous technology
- Multiple venues for display and exhibition of student work
- Indoor/outdoor connections

D. Document the anticipated costs for the facility, including renovation, rent, utilities, and maintenance. Identify, if applicable, any funding sources (other than state and local funding) that will be applied to facilities-related costs and include evidence of such (e.g. letter, MOU) as Attachment U. If renting an existing facility, provide draft lease agreement as Attachment V.

Construction will be funded through the Colen Family Charitable Trust, a private, not-for-profit entity. A $25 million budget has been established and the RFP process has been completed for architectural design services. This will be a design, bid and build project. The school will lease the facility once completed. Although a lease agreement has not been finalized, we anticipate paying between 7% and 15% of FEFP revenue towards rent, which is near or below market value. The rent payments will correlate with enrollment and the size of the facility being used. Facility costs are included within the five-year budget described in section 20.

E. Describe the back-up facilities plan. What is the alternate plan for facilities if the proposed facility is not available or is determined to be inappropriate for the school's opening?

Should construction delays prevent the facility from being completed within the required timeline, the Board will notify the district and request a one-year deferral of the school's opening.

<u>If the site is not yet acquired:</u>

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

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

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

I. Describe the back-up facilities plan.

Section 17: Transportation Service

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

IACA will ensure transportation is not a barrier to equal access for students living within a reasonable distance of the school in accordance with Florida Statutes. Prior to the school's opening we will disseminate a Request for Proposal to solicit a school transportation vendor to provide transportation services. The company selected must meet all statutory and regulatory requirements for school transportation. The school will work closely with the district or the selected transportation provider to ensure compliance with all applicable requirements outlined within these statutes and rules (e.g., maintenance; inspections; driver screenings; training).

If a student with a disability has an individual educational plan (IEP) that indicates the need for transportation services, additional requirements may apply; IACA will comply with the requirements of the student's IEP and any applicable rules and regulations. We will also ensure that transportation for any school sponsored events requiring busses, such as field trips, will be carried out in accordance with the statutory requirements and on approved vehicles with appropriate drivers.

Upon enrollment, we will survey students living within a reasonable distance from the school to determine their interest in busing services. This will allow us to better estimate demand and usage as we get closer to the school year and to adjust our budget as necessary. Currently, the budget assumes that 48 percent of students will take advantage of busing services (based on the MCPS ridership rate[32]); The cost is described in Section 20. In addition to traditional bus stops, arrangements may include centralized hubs throughout the target area. The hub model is designed for parents to transport their child to and from a centralized hub stop, generally located in a public place with easy access. We understand the concept of centralized stops may not be appropriate for some special education students; transportation for these students will be handled on a case-by-case basis to ensure adherence to their IEPs.

Prior to opening, IACA will develop specific policies related to busing which will include the minimum and maximum distance from the school within which transportation will be provided. Once students have enrolled, a specific pick-up and drop-off plan will be developed and provided to families. We anticipate that this plan will be completed and shared no later than early July 2022 prior to the school's opening in August 2022.

[32] Florida School District 2017-18 Transportation Profiles. Vol. 28, April 2019. http://www.fldoe.org/core/fileparse.php/7585/urlt/schtrandist1718.pdf

Section 18: Food Service

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

IACA recognizes the importance of good nutrition for our students' mental and physical health. We are committed to making healthy breakfast and lunch options available to all our students and offering well-balanced nutritious menu options. We intend to become a National School Lunch Program (NSLP) sponsor. Once staff are hired, we will send appropriate staff member(s) to the next available NSLP Training.

After completing the training, we will send out an RFP to contract with a third party provider to manage, prepare and serve food to our students. The RFP for a provider will include the requirements laid out in the NSLP program and those required by local health inspectors and building codes, as well as the school's expectations for healthy, minimally processed menu options. We anticipate that food service staff will be included in the vendor contract to assist with delivery and distribution, all of which will be negotiated through the RFP and selection process in accordance with applicable policies and legal requirements.

In addition, IACA staff will work with the Florida Department of Agriculture and Consumer Services to develop required agreements for reimbursement and will attend any required workshops. During the first week of school each year, IACA will distribute free and reduced price lunch applications to each student. Information provided to families also will explain that a household may apply for benefits at any time during the school year; children of parents or guardians who become unemployed or experience a financial hardship mid-year may become eligible at any point during the school year. Homeroom teachers will be required to document each student's receipt of the application. Administrative staff will be available to address questions and concerns.

IACA will strive to have as many families as possible complete the forms. Applications also will be provided to students enrolling during the year. All applications and records will be carefully logged and maintained for review by state or federal auditors.

We will work with MCPS to verify student eligibility for the free/reduced lunch program, adhering to all federal regulations and guidelines. After the application is processed, a response is forwarded to each family. In accordance with the National School Lunch Act (42 U.S.C. 1751(b)(2)(C)), a confidential list is then compiled and forwarded to the cafeteria manager. Meal benefits begin on the day the application is approved at the school site and the student's eligibility continues for up to 30 operating days into the next school year (or until a new eligibility determination is made, whichever comes first). When the carryover period ends, unless/until a new application is approved, the student's meals must be claimed at the paid rate.[33]

[33] Eligibility Manual for School Meals: Determining and Verifying Eligibility. USDA Food and Nutrition Services. July 18, 2017. https://fns-prod.azureedge.net/sites/default/files/cn/SP36_CACFP15_SFSP11-2017a1.pdf

Section 19: School Safety and Security

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

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

In adherence to The Marjory Stoneman Douglas High School Public Safety Act, IACA will work with the district to ensure there is a trained School Resource Officer (SRO) assigned to the school. We will have the SRO on school property during school hours. The SRO will be visible throughout the day and interact with staff and students to ensure safety. This SRO will also be designated as the "school safety specialist" for the school.

IACA plans to use the Raptor Technologies V-Soft program to monitor visitors, students and staff to enhance our campus security. Staff and students will be required to wear picture IDs/badges while on campus. Locking classroom doors and monitoring passageways is intended to limit access to the campus. The campus will also be secured by a fence that surrounds the property and remains locked during school hours. Staff badges will include scanning technology to open locked entryways. The school will have a single point of entry where all visitors will be required to show identification when checking in with the office personnel. Security cameras will be installed throughout the campus to monitor behavior throughout the campus. The school will also have a school radio system; an administrative leadership team will have a walkie-talkie assigned to them. IACA will develop and have available upon request a detailed safety and crisis plan in accordance with s. 1006.07(4) F.S., that includes specific protocols for students and staff needing special assistance, bomb threats, active shooter and hostage situations, shelter in place, lock-out procedures, severe weather situations, internal emergencies such as electrical outages, gas leaks, weapon suspected, missing students, hostage situation, and lock-downs. This emergency plan, including drills will be developed in full compliance with the Marjory Stoneham Douglass HS Public Safety Act and shared with all staff members in advance of school's opening, but kept otherwise confidential.

Safety of students will include working to ensure mental health issues are effectively addressed through early intervention. IACA will hire a full-time school counselor. The school will assemble a threat assessment team, consisting of experts in counseling, instruction, administration and law enforcement whose duties include the responsibilities for the coordination of resources and assessment and intervention with individuals whose behavior may pose a threat to the safety of school staff or students. When staff members suspect a mental health or substance abuse crisis, they will engage behavioral health crisis resources. All staff and students will be kept aware of the FortifyFL tool, encouraging them to anonymously report suspicious activity through a mobile app, which will also be available on all electronic devices at the school. The school may choose to seek a grant through the Crime Stoppers Trust Fund for student crime watch programs as part of the "Marjory Stoneman Douglas High School Public Safety Act.

IACA will observe the Children's Internet Protection Act (CIPA) by ensuring they adhere to the Federal Communication Commission (FCC) guidelines by implementing internet policies that block or filter internet access to content that is: a) obscene; b) child pornography c) harmful to minors. The internet safety policy will also include monitoring the online activities of minors;

and educate minors about appropriate online behavior, including interacting with other individuals on social networking, cyberbullying awareness and response.

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

The Active Assailant Response Plan (AARP) is designed to allow school personnel to respond to an active assailant situation. The school will develop a plan that is specific to the campus and train all staff members on their specific responsibilities in the plan by October 1st of each year. The plan will be approved by the governing board and the Principal shall certify that all school personnel have received annual training on the plan. The plan will include detailed procedures on how staff and students should react in the event of an active assailant situation, which may include locking doors, closing windows, and moving to specified areas. The plan will identify certain staff members as crisis team members. In addition to annual staff training, the school will conduct monthly active assailant drills involving staff and students that will implement procedures from the plan. The Principal will work with the district safety specialist to conduct a school security risk assessment of the campus using the Florida Safe Schools Assessment Tool (FSSAT) developed by the Office of Safe Schools. IACA will incorporate the recommendations of law enforcement and first responders per s. 1006.07(6)(c), F.S. and periodically update the plan based on the FSSAT and feedback obtained through monthly active assailant drills and other safety drills. District employees, staff and students will be required to wear identification badges at all times.

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

The school will establish a threat assessment team whose duties include the responsibilities for the coordination of resources and assessment and intervention with individuals whose behavior may pose a threat of violence to self or others and exhibits significantly disruptive behavior and a need for assistance, or to the safety of school staff or students. The team shall include individuals with expertise in: counseling, instruction, school administration, and law enforcement. The team will use the behavioral threat assessment instrument developed pursuant to 1001.212(12). The team will meet monthly or as often as needed. Upon the identification of a potential threat, the threat assessment team will convene to assess the threat utilizing the behavioral threat assessment instrument.(CSTAG) The threat assessment team will follow the procedures outlined in s. 1006.07(7) and the behavioral threat assessment instrument to evaluate and address any threat to the safety of IACA's staff and students.

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

IACA will be following the district's code of conduct and will train the principal and at least two staff members using the FLDOE online training portal to distinguish the difference between discipline matrix codes/issues and School Environmental Safety Incident Reporting (SESIR) offenses, as well as training in determining the severity of the offense. If a SESIR offense is committed, it is reported to the SRO at the school who has been trained by either FLDOE or the district on SESIR and how to report the incidents. Alternatively, either the principal or one of the other staff members trained on SESIR will report the offense. We will work closely with the district to ensure that the school level data are reported to the district in the format and within the timeline established by the district.

Section 20: Budget

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

See Attachment X.1 and Attachment W. These budgets contain all projected revenue and expenses except for:

- Public Charter School Grant: Because the competitive nature of this grant creates uncertainty as to availability, this potential source of revenue is omitted from these budgets. If grant funds are received, the primary focus will be classroom technology, equipment, furnishings and supplies, as well as staff development activities.
- Supplemental Federal Funds (e.g., IDEA; Title I): Even though the school expects to qualify for these funds, they are supplemental to the academic program, each with a specific focus and cannot be used to supplant other expenses of the school. Therefore, these budgets demonstrate that the school will be adequately funded without these funds.

These budgets are presented with revenues and expenses classified in compliance with Financial and Program Cost Accounting and Reporting for Florida Schools (Redbook).

B. Provide a start-up budget as Attachment Y that contains a balance sheet, revenue projections, including source of revenues, expenses, and anticipated fund balance. The start-up budget must cover any period prior to the beginning of FTE payments in which the school will expend funds on activities necessary for the successful start-up of the school.

See Attachments Y.1 and Y.3.

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

See Attachment Z.

D. Provide a detailed narrative description of the line-item revenue and expenditure assumptions on which the operating and start-up budget are based. The budget narrative should provide sufficient information to fully understand how budgetary figures were determined.

See Attachment X.1 and Y.1 for detailed line-item budget narrative.

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

At the point a revenue shortfall is identified, the charter school board and administration will immediately begin planning the appropriate response. A significant enrollment deficit will, of course, require a budget amendment.

A critical factor in preparing the budget amendment is the interrelationships between line items. For example, adding (or deleting) one student impacts supplies, textbooks, possibly contracted ESE services, etc.; adding (or deleting) a section of students also impacts teachers, substitutes, etc.; administrative costs would be affected only by large enrollment changes.

Time is a critical factor in effectively coping with revenue shortfalls. Prompt, effective action can limit both the duration and depth of budget cuts necessitated.

Finally, the nature and cause of the enrollment change, and the charter school's response, will be evaluated. This will allow the charter school to possibly avoid future revenue losses, or to improve responses to future events.

Budgets for 75% and 50% enrollment are included as Attachment X.3 and X.4.

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

The budget approved with the application will become the approved budget for the start-up period and Year 1 of operations. This budget will be subject to continual and intense monitoring to identify any variance as assumptions become actuals. The budget will be updated frequently, after each significant event.

Examples of events which will impact the budget include updated enrollment numbers, changes in the local economic environment, hiring staff, new legislation, ordering furniture, etc. We recognize that the budget must be managed while considering the effects of controllable and uncontrollable events.

In addition to the standard monthly financial reports as defined in Rule 6A-1.0081, F.A.C, beginning after the first quarter of activity in the opening year, the board will receive a monthly projection of both cash and budget performance, including projected cash balances or deficits and proposed budget amendments.

The budget monitoring process is key to managing revenue being less or delayed compared to budget. The following specific strategies are designed to respond to budget revenue shortfalls.

First, during the start-up period, and until the charter school is fully operational, the projected budget compared to the approved budget will be an agenda item during each charter school board meeting, as well as in any meetings between School Financial Services and school staff.

Also, budgeted expenditures will be deferred until justified, and approved in segments. Furniture, textbooks, computers, etc., will be ordered to match enrollment gains. Similarly, teachers and other staff will be interviewed and identified, with provisional identification of employees, but hiring will be authorized only after the need is established.

G. Provide monthly cash flow projections for the school's start-up period (i.e. from the date on which the application is approved to the beginning of the first fiscal year of operation) through the first year of operation.

See Attachments X.2 and Y.2.

Section 21: Financial Management and Oversight

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

The IACA founding board recognizes that, similar to any other start-up business, financial management is crucial to the success of the school. This places great responsibility on the board, and that responsibility is further intensified because public funds are being invested. The board further acknowledges that this responsibility cannot be shifted to a third party by contracting for back office services. Conversely, because of the complexity and uniqueness of charter school accounting and financial reporting, the board recognizes the value of engaging an appropriate third party to provide back office services. In this way, the board enhances its capability to provide financial oversight.

School Financial Services (SFS) provides back office accounting services to over 30 charter schools in Florida. The firm limits its practice to schools, thereby providing access to knowledgeable professionals who are focused on charter schools in general and on IACA specifically. The school will be working directly with Gary Scott, President of School Financial Services, and Keith Spence, Chief Operating Officer.

School Financial Services is SSAE 16 certified. SFS has undergone an attestation engagement performed by an independent certified public accounting firm under the guidelines of Statement on Standards for Attestation Engagements (SSAE) No. 16, Reporting on Controls at a Service Organization. The resulting report indicated a positive opinion of management's description of SFS's internal control system and suitability of the design and operational effectiveness of internal controls. This report provides two benefits to client schools of School Financial Services: (1) The school's independent auditor can reduce testing of transactions, thus reducing the cost of the school's audit, and (2) The school can have confidence in the services provided by School Financial Services.

School Financial Services uses Denali Fund Accounting software, which is specifically designed for not-for-profits. Denali has integrated general ledger, accounts payable, payroll, and bank reconciliation functions. The comprehensive nature of this software coupled with the internal controls in place facilitates the recording of transactions by fund, function, and object. This allows for transactions to be recorded accurately and appropriately, including properly identifying purchases of property. Property records are maintained in accordance with state requirements. Source documents supporting transactions are preserved, facilitating the audit process. General ledgers and books of original entry are kept so as to allow the preparation of financial statements in accordance with generally accepted accounting principles and in compliance with Redbook.

Having appropriate financial statements will allow the preparation of projections of budget performance and cash balances through the fiscal year, thus allowing the school to adjust activity as necessary to maintain fiscal integrity.

The system as described has undergone numerous audits of dozens of schools by at least ten different auditors in three states without any finding relating to the accounting system, demonstrating the effectiveness of the process of fiscal management.

School Financial Services will prepare, on an annual basis, a budget in cooperation with the Principal. The budget will outline all anticipated revenues and expenditures, by object and function. The budget will be submitted to the governing board for review and approval. Upon approval, a copy of the budget will be filed with the board minutes for public record, a copy will be held at the school site, a copy posted to the school's website, and a copy will be provided to the sponsor.

SFS, on behalf of the School, shall prepare monthly financial statements in compliance with Rule 6A-1.0081, F.A.C, which shall include a balance sheet and a statement of revenues, expenditures and changes in fund balance. The monthly financial statements shall be prepared in accordance with the function/object dimensions prescribed in the Florida DOE publication, Financial and Program Cost Accounting and Reporting for Florida Schools (Redbook).

The School shall also prepare and maintain all reports required to be filed with the Government of the United States and the State of Florida. Such reports shall include, but are not limited to, all payroll tax returns and any required filing relating to the School's non-profit status.

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

Detailed financial statements will be prepared on a monthly basis for analysis by the Charter School Board. These financial statements will be reviewed by the Charter School Board at monthly meetings and will be submitted to the Sponsoring District for monitoring/review. The monthly financial statements will comply with Rule 6A-1.0081, F.A.C. and include:

- Balance Sheet
- Statement of Revenues, Expenditures and Changes in Fund Balance
- Year-to-date comparison of budgeted vs. actual revenues and expenditures

Supplemental information, including but not limited to, bank reconciliations, bank registers, detailed general ledgers, relevant correspondence from the sponsor, grantor agencies, etc., will be provided to the board as applicable.

During the first year of operations, beginning after the first quarter of activity, the board will receive a projection of both cash and budget performance monthly, including projected cash deficits and proposed budget amendments.

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

The School will adhere to the audit selection requirements per Florida Statutes and the Auditor General Requirements and ensure that the Audit Report checklist §11.45(3)(a), Florida Statutes, accompanies the audit in a timely manner in compliance with the charter agreement. The auditing firm shall be selected by request for proposal (RFP) with proposals only accepted from qualified firms, and significant credit given to firms for prior experience with charter schools. The audit report will be an agenda item of a board meeting, using findings and recommendations to improve the effectiveness of its oversight.

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

In order to provide financial information that is comparable to that reported for other public schools, the school will maintain all financial records in an accounting system that is in accordance with the accounts and codes prescribed in the most recent issue of the publication

titled, “Financial and Program Cost Accounting and Reporting for Florida Schools” (Redbook), pursuant to §1002.33(9)(g)(1), Florida Statutes. Thus, the School’s accounting will be consistent with accounting conducted for Florida school districts and will contain a uniform chart of accounts for budgeting and financial reporting. The uniform chart of accounts addresses topics that include governmental accounting standards, program cost accounting, and reporting.

School Financial Services, Inc. will maintain the accounting records of the School, and uses Denali Fund Accounting software, which is specifically designed for not-for-profits. Denali has integrated general ledger, accounts payable, payroll, and bank reconciliation functions. The comprehensive nature of this software coupled with the internal controls in place facilitates the recording of transactions by fund, function and object. This allows for transactions to be recorded accurately and appropriately, including properly identifying purchases of property. Property records are maintained in accordance with state requirements. Source documents supporting transactions are preserved, facilitating the audit process. General ledgers and books of original entry are kept so as to allow financial statements in accordance with generally accepted accounting principles and in compliance with Redbook.

The documents comprising the accounting records will be kept in accordance with the General Records Schedule for Local Government Agencies GS1-SL, as authorized by 119 and 257, FS.

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

There are three overlapping layers of financial transparency required of charter schools. First, exempt organizations are required by the Internal Revenue Code to make their Form 1023 (Application for Recognition of Exemption Under Section 501 (c) 3) and annual Form 990 (Return of Organization Exempt From Income Tax) available for public inspection and copying.

Additionally, charter schools are bound by Florida’s Government in the Sunshine Law, provisions of which include the public notice of and the opportunity for public participation in board meetings; as well as the Public Records Act, which ensures public access to records and documents.

Finally, §1002.33(9)(p)(1), Florida Statutes, requires charter schools to provide access, through its website, to the annual budget and independent audit.

IACA will comply with all of these.

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

IACA plans to contract with School Financial Services (SFS) to provide back office accounting and payroll services. SFS provides comprehensive services, including, by general category, accounts payable, general ledger maintenance, financial statement preparation, cash management, budgeting, grant reporting, payroll processing, and payroll return preparation. The standard fee for accounting services is 3% of FEFP net of the district administration fee. This rate is reduced by 0.1% for each full $1,000,000 of net FEFP. The fee for payroll services is 1.25% of gross salary. There is no additional fee for supplemental or correcting payrolls. No contract will be in place until the charter is approved. The contract will be binding on the school at the beginning of the first year of operations. All services to that point are provided pro-bono.

IACA will engage an independent auditor. The school has not yet identified the auditor, as the selection will be made through the RFP process, and in compliance with Florida Statutes and Auditor General guidelines.

G. Describe how the school will store financial records.

Student and financial records will be kept in accordance with the General Records Schedules GS1-SL and GS7, as authorized by 119 and 257, FS.

"Record" includes any pertinent information, regardless of the media stored upon. Therefore, written record, audio recordings, video recordings, disks, etc., are all considered records.

Financial records will be kept in electronic and paper formats. Permanent documents, such as deeds, mortgages, etc., will be kept in secure, locked, fire-proof cabinets.

H. 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, at its own expense, provide evidence of insurance consistent with the Sponsor's requirements for insurance and in accordance with the time frame for providing that insurance as stated in the charter. The School will only acquire insurance from an insurer (carrier) that is authorized by the Department of Insurance of the State of Florida, or an eligible surplus line insurer under Florida Statutes. The insurer will have an AM Best rating of "A-" or better and financial size category of "IV" or better according to the latest edition of Best's key rating guide published by AM Best Company.

Insurance coverage will be procured and maintained consistent with the Sponsor's requirements. The following amounts comply with the Florida Charter School Standard Contract. Any updated requirements made to the Standard Contract by the State or Sponsor will be adhered to.

1. Health: The school will provide health and other group insurances to employees in amounts competitive with other employers.
2. Worker's Compensation Insurance: The School agrees to provide adequate Workers' Compensation insurance coverage as required by Chapter 440, Florida Statutes.
3. Commercial General Liability Insurance: Coverage written on an occurrence form with minimum policy limits of $1,000,000 per occurrence and an aggregate limit of $2,000,000.
4. Property Coverage: Property coverage insurance will be carried on all real and tangible property that is defined and determined to be covered under the property insurance.
5. School Leaders Errors and Omissions Insurance: $2,000,000 per claim/annual aggregate, maximum $25,000 deductible.

Additionally, as needed, the school will establish the following coverages:

1. Fidelity Bonds and Crime Coverage: The School will carry or require coverage for all defined and determined board members, employee and vendors.
2. Automobile Liability Insurance: $1,000,000 per occurrence and an aggregate limit of $2,000,000 including all owned, hired, and non-owned automobiles.
3. Builder's Risk Insurance: Insurance equal to the actual replacement cost for construction work.

Section 22: Start-Up Plan

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

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

Action Item	Projected Date
Applying for and securing appropriate legal status	Completed
Identifying and securing facility • Complete all necessary facilities contracts/renovations • Complete fire and health inspections • Obtain final CO • Move into facility	 • May 2022 • June 2022 • June 2022 • July 15, 2022
Recruiting and Hiring Staff • Establish hiring policies • Post position and recruit principal candidates • Begin interviewing for the principal position • Hire principal • Develop employee manual • Post teaching positions • Interview for teaching positions • Have all teachers hired • Fingerprinting, drug testing and background checks completed	 • September 2021 • November 2021 • January 2022 • February 2022 • December 2021 • March/April 2022 • April/May 2022 • May 2022 • June 2022
Staff Training • Conduct teacher orientation and professional development	 • July/August 2022
Finalizing Curriculum and Other Materials • Develop schoolwide curriculum plan • Finalize instructional materials decisions • Review/debrief on program implementation for Q1; incorporate results into Q2 planning	 • April/May 2022 • May 2022 • October 2022
Governing Board Training • Board members complete state-approved training and background checks • Board members attend statewide charter school conference	 • W/in 60 days of contract approval • October 2020 and 2021

Action Item	Projected Date
Policy Adoption by Board	
• Adopt segregation of financial duties policy	• May 2020
• Adopt corporate and financial policy manual(s)	• May 2020
• Adopt annual budget	• June 2020, & 2021, 2022
Recruiting Students	
• Develop website	• October 2020
• Develop and disseminate marketing materials	• November 2021-May 2022
• Host town hall meetings	• December 2021-May 2022
Enrollment Lottery, if necessary	
• Develop lottery policies and procedures	• November 2021
• Develop enrollment packet	• January 2022
• Notification of lottery (if necessary); conduct lottery	• February 2022
• Admission/Waitlist notice sent	• March 2022
Establishing Financial Procedures	
• Release RFP for back office service provider	• April 2020
• Notification to vendor of award of contract	• May 2020
• Governing board adopts financial procedures	• June 2020
• Develop procurement policies	• July 2020
Securing Contracted Services	
• Release RFP for HR services	• November 2021
• Select HR provider	• January 2022
• Advertise for security, janitorial services, food services, transportation contracts, ESE support staff (OT, PT, SLP)	• March 2022
• Make decisions on contracted service providers	• May 2022
Finalizing Transportation and Food Services	
• Negotiate with district/third party provider for transportation and food service	• April 2022
• Develop bus pick-up and drop off plan	• June 2022
• Develop plan with Food Service Provider for lunch location, times, etc.	• June 2022
• Distribute Federal lunch program survey to all students	• August 2022
Procurement of Furniture, Fixtures, and Equipment	
• Identify and plan for FF&E Needs	• March 2022
• Obtain quotes for FF&E	• April 2022
• Place orders for FF&E and establish procedures for receipt	• May 2022
• Inventory completed for furniture, fixtures, and equipment	• July 2022
Procurement of Instructional Materials	
• Place orders for instructional materials	• June 2022
• Develop process for receiving instructional materials	• July 2022
• Materials received and inventoried	• July 2022

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 Ina A. Colen Academy 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 s.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 s.1008.22, F.S.
- Will comply with Florida statutes relating to public records and public meetings, including Chapter 119, Florida Statutes, and s. 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 s. 218.39, F.S.

The governing board, at its discretion, allows Christy Noe (name), Consultant (title) to sign as the legal correspondent for the school.

_____ _____

Signature *Date*

_____

Printed Name

ATTACHMENTS

Attachment B: Sample Daily Schedule, Days/Hours of Instruction, Annual Calendar

Sample Daily Schedule and Annual School Calendar

IACA will follow the annual calendar set forth by the district, requiring 180 days of instruction each school year. The district's calendar for the 2019-20 school year is provided as a sample. Our proposed instructional day exceeds state requirements for all grades (i.e., 720 hours/year for kindergarten through grade 3; 900 hours per year for grades four through eight). We are proposing a six hour and one-half hour school day from 8:00 to 2:30 p.m. Of that time, students in kindergarten through grade five will receive 350 minutes of instruction daily, for a total of 1,050 hours per year. Students in grades six through eight will receive 334 minutes of instruction daily, for a total of 1,002 hours per year.

Kindergarten through Grade Five

An example of a possible K-5 daily schedule is provided below. The schedule includes:

- Morning Meeting – 20-minute period that includes start-of-day SEL activities
- Literacy Block – 120-minute period that includes 90 minutes of uninterrupted instructional time in reading with writing integrated
- Physical Education – 30 minutes per day
- Mathematics – 50 minutes per day
- Science – 50 minutes per day
- Social Studies/Class Meeting – 40 minutes per day of social studies for kindergarten through grade four; beginning in grade five, the Compass Circle will be implemented one day per week in lieu of the traditional social studies class.
- Special Area – Art and music (or other special area) 30 minutes per week
- Intervention/Enrichment – 30 minutes three days per week

Sample K-5 Schedule

Subject	Start Time – End Time			Class Minutes	Instructional Minutes
Morning Meeting	8:00 a.m.	–	8:20 a.m.	20	20
Literacy Block (Reading & Language Arts)	8:20 a.m.	–	10:20 a.m.	120	120
Physical Education	10:20 a.m.	–	10:50 a.m.	30	30
Mathematics	10:50 a.m.		11:40 a.m.	50	50
Lunch/Recess/Movement	11:40 a.m.	–	12:20 p.m.	40	0
Science	12:20 p.m.	–	1:10 p.m.	50	50
Social Studies/Class Meeting	1:10 p.m.	–	1:50 p.m.	40	40
Special Area/Intervention/Enrichment	1:50 p.m.	–	2:20 p.m.	30	30
End-of-Day Closing/Dismissal	2:20 p.m.	–	2:30 p.m.	10	10
			Total Time	390	350

Grades Six through Eight

An example of a possible daily schedule for middle grades and the total number of courses, by subject, are provided below. All courses will be drawn from those set forth in the FLDOE Course Code Directory. The schedule includes:

- English - Regular and advanced language arts courses
- Mathematics – Regular and advanced courses, including Algebra 1 for high school credit

- Science - Regular and advanced courses, including Biology 1 for high school credit if there is demand
- Social Studies - Regular and advanced courses, including Civics
- Physical Education
- Health
- World Language – Most likely this will be Spanish, unless demand supports a different language
- Electives – Regular, advanced, and intensive courses, including:
  - ✓ Fine and performing arts – studio art, digital art, drama, band, chorus
  - ✓ Introductory/exploratory courses such as Career Research and Decision Making
  - ✓ Intensive reading course as applicable for student's performing significantly below grade level on the ELA FSA

Grades Six through Eight

	Subject	Start Time – End Time			Class Minutes	Instructional Minutes/Day
1	Home Room/English	8:00 a.m.	–	8:51 a.m.	51	51
2	Mathematics	8:54		9:40	46	46
3	Physical Education/Health	9:43		10:29	46	46
4	World Language	10:32		11:18	46	46
5	Science	11:21		12:07	46	46
	Lunch	12:10		12:40	30	0
6	Social Studies/Compass	12:43		1:40	57*	45
7	Intervention/Elective/Dismissal	1:43		2:30	48	45
				Total Time	370	334

Courses by Grade and Subject

Grade	English	Math	Social Studies/ Civics	Science	World Language	PE	Health	Electives	Total Courses
6	1	1	1	1	1	.5	.5	1	7
7	1	1	1	1	1	.5	.5	1	7
8	1	1	1	1	1	.5	.5	1	7
	3	3	3	3	3	1.5	1.5	3	21

Board Approved 1/8/19

Marion County Public Schools
2019-2020 180-Day Instructional Calendar

			Teacher Day	Student Day
August 2, 2019	Friday	New Teachers Report		
August 5	Monday	All Teachers Report		
August 6	Tuesday	District (Secondary) Inservice Day		
August 7	Wednesday	District (Elementary) Inservice Day	5	
August 12	Monday	Students Report - First Day of School		
September 2	Monday	Labor Day (No School) - Paid Holiday	1	
September 9	Monday	20th Day - End of First Month	20	20
September 25	Wednesday	K-12 Student Early Release / Teacher Inservice #1		
October 7	Monday	40th Day - End of Second Month	20	20
October 10	Thursday	End of First 9-Week Grading Period (43rd Day)		
October 14	Monday	Teacher Workday #1 (No School)	1	
October 15	Tuesday	District Inservice (No School)	1	
October 16	Wednesday	Students Report		
October 30	Wednesday	K-12 Student Early Release / Teacher Inservice #2		
November 6	Wednesday	60th Day - End of Third Month	20	20
November 25-27	Mon-Wed	Thanksgiving Break - No School		
November 28	Thursday	Thanksgiving Day (No School) - Paid Holiday	1	
November 29	Friday	Thanksgiving Holiday (No School) - Paid Holiday	1	
December 2	Monday	Students Report		
December 11	Wednesday	K-12 Student Early Release / Teacher Inservice #3	20	20
December 11	Wednesday	80th Day - End of Fourth Month		
December 19	Thursday	End of First Semester (86th Day)		
		Winter Break Begins at End of Day		
December 25	Wednesday	Christmas Day - Paid Holiday	1	
January 1, 2020	Wednesday	New Year's Day - Paid Holiday	1	
January 6	Monday	Teacher Workday #2 (No School)	1	
January 7	Tuesday	Students Report - First Day of 2nd Semester		
January 20	Monday	Martin Luther King, Jr. Day (No School)		
January 22	Wednesday	K-12 Student Early Release / Teacher Inservice #4		
January 27	Monday	100th Day - End of Fifth Month	20	20
February 17	Monday	Presidents' Day (No School)	1	
February 25	Tuesday	120th Day - End of Sixth Month	20	20
February 26	Wednesday	K-12 Student Early Release / Teacher Inservice #5		
March 13	Friday	End of Third 9-Week Grading Period (133rd Day)		
March 16-20	Mon. - Fri.	Spring Break (No School)		
March 23	Monday	Teacher Workday #3 (No School)	1	
March 24	Tuesday	Students Report		
April 1	Wednesday	140th Day - End of Seventh Month	20	20
April 15	Wednesday	K-12 Student Early Release / Teacher Inservice #6		
April 29	Wednesday	160th Day - End of Eighth Month	20	20
May 25	Monday	Memorial Day (No School) - Paid Holiday for 12-month employees		
May 28	Thursday	180th Day - End of School - End of Second Semester	20	20
May 29	Friday	Teacher Workday #4 (No School)	1	
June 1-2	Mon-Tues	Hurricane Make-up Days (if needed)		
		Totals	196	180

Attachment D. Reading Curriculum

Literacy Instruction at Ina A. Colen Academy

IACA's literacy curriculum, strategies, instruction, and interventions are primary elements of the school's comprehensive educational approach. We recognize that to develop student literacy, the school must deliver comprehensive reading instruction with fidelity, assess students' progress regularly, and analyze all available data sources and progress monitoring information to adjust instruction to meet the needs of our learners. In addition, we strive to incorporate reading and writing skills throughout the educational program while offering cross-curricular connections for students to support meaningful engagement. Just as literacy instruction will be incorporated into all subject areas, conversely, content area informational text will be used to instruct and reinforce reading strategies.

In conjunction with our whole child approach to learning, and connecting students to content and real-world applications through project based learning (PBL), we are committed to ensuring IACA students develop a love for reading, appreciate the ways reading can help them engage in and learn about the world around them, and understand that reading is a necessary skill for lifelong success. Through the integration of reading instruction across content areas, students are exposed to various types of texts and genres across multiple settings and have ample opportunity for intentional reading practice. With our focus on authentic PBL, literacy is embedded within hands-on practical tasks and activities. This encourages transfer and generalization of reading skills in a manner that supports becoming an effective lifelong reader.

In accordance with Rule 6A-6.053, F.A.C, a charter school has option of adopting the district's Comprehensive Research-Based Reading Plan (CRRP) but is not required to do so. IACA will use the core components of the MCPS CRRP to provide a systematic framework for instruction.

The IACA reading program mirrors Florida's 6 + 4 + ii + iii formula for reading success:

- **6** areas of reading – Oral language, phonemic awareness, phonics, fluency, vocabulary, comprehension
- **4** types of assessment – Screening, progress monitoring, diagnosis, outcome measures
- **ii** – Initial instruction – A minimum 90-minute reading block, incorporating the six instructional components of effective reading instruction into a comprehensive and cohesive instructional design
- **iii** – Immediate intensive intervention– To include small group or one-on-one, for students with reading deficiencies for a minimum of 30 minutes per day until deficiency is remediated

IACA's framework for literacy is designed to develop skilled readers so that students can engage in learning more freely and gain command of all aspects of their educational endeavors. The program is designed to support explicit and systematic teaching of grade-level skills and concepts, and to meet the needs of students working either above or below grade level through differentiated instruction. Integral to the reading program is an explicit, systematic, and interactive instructional design focused on the six essential elements of reading instruction:

- Oral language – This includes listening and speaking skills and provides the foundation for literacy development
- Phonemic awareness – The ability to hear and manipulate phonemes, the smallest of units in a spoken language

- Phonics – The correspondence of letters to sounds, including the ability to decode words when reading, and spell words when writing
- Fluency – The ability to read at an appropriate rate with accuracy and prosody, including inflection and expression
- Vocabulary – The development of word meaning, word usage, and the application of contextual understanding
- Comprehension – The ability to read, process, and understand (obtain meaning from) text

Reading instruction is provided during a 120-minute literacy block with additional time built into the proposed schedule for supplemental instruction, intensive intervention, or enrichment, as needed. Our core program embeds regular progress monitoring measures to be analyzed and used in a meaningful way to drive reading instruction and interventions.

We intend to use Core Knowledge Language Arts (CKLA), the program currently used by the districts as its core curriculum, as the basis for English language arts instruction in the elementary grades. The underlying tenets upon which CKLA was developed are based on four principles of instruction:

- Explicit instruction in the code is necessary for automatic and effortless decoding. Beginning reader instruction must help students read words automatically and effortlessly.
- Background knowledge is essential for good comprehension. Unlike decoding, comprehension is not a skill that can be transferred from one text to another. Comprehension strategies provide some assistance but building students' stores of background knowledge is more effective.
- Vocabulary learning is most efficient when it is contextualized, content-based, and constant. Most vocabulary is learned through context, not memorization of lists. CKLA's use of varied and complex text that has been intentionally designed and sequenced fosters vocabulary developed in young learners.
- The connection between oral and written language must be supported. For most students, reading comprehension lags behind listening comprehension. Their overall learning benefits from hearing and discussing complex text read aloud by the teacher.

These principles support all strands of the Language Arts Florida Standards – reading/literature, reading/foundational skills, reading/informational text, writing, speaking and listening, and language.

In addition to the school's interdisciplinary focus on reading and writing across the curriculum, strategies to support reading development will include such things as:

- Classroom Library – The print-rich environment will include classroom libraries of quality literature that includes material written at varying reading levels and in a variety of genres. These collections will include multi-leveled text sets that are related to various topics in the areas of science, math and social studies. The resources will also be multileveled to meet the spectrum of reading levels in the classroom. The physical layout of the classrooms will provide easy access to reading materials during literacy center time within the daily reading block as well as throughout the day.

- Word Walls – Teachers will create word walls of high frequency words, word patterns, phonic elements, and interesting, unique, or exciting words. Word wall activities will support student practice in recognizing words quickly and accurately. Word walls will be developed for reading, mathematics, and science.
- Literacy Stations – Centers or stations will be established within the classroom that allow students to work independently or in small groups. Students will engage in a variety of independent activities to reinforce and extend learning, including practicing reading, writing, speaking, listening, and working with letters, sounds, and words.
- Sustained Silent Reading – Periods of sustained silent reading will be incorporated into the reading block as well as throughout the school day to help students build stamina for increasingly longer and more challenging text. All teachers and students in kindergarten through grade eight will participate in a sustained silent reading time. Students may choose books from the class library or may bring appropriate books from home. The goal is to develop an intrinsic motivation to read. Reading logs, reaction journals, and book pass or story summary activities will retain student interest and help them connect to the text.

Reading is integrated into the Language Arts class for middle grades students. Instruction in middle grades English language arts classrooms 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 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, literary analysis, the writing process, communication, information and media literacy.

For grades six through eight, we believe that a combination of trade literature and authentic texts supplemented by a text such as *Collections* (Holt McDougal) currently on the state adoption list and used by MCPS for language arts in grades six through eight will provide a solid foundation for our students. The program provides a blended digital and print approach and the balance of fiction, nonfiction, and informational texts aligns with the expectations of the LAFS. Scaffolded supports embedded within the materials include:

- Close Read Screencasts for each anchor text provide visual and auditory models of close reading conversations about text.
- Stream to Start™ Videos introduce each collection, capture interest, and clarify elements related to the theme.
- Text in Focus Videos, beneficial for developing readers and English learners, enhance understanding of anchor texts by using graphic elements to explain figurative language, sentence structure, and main ideas.
- Xplor eMagazine, for developing readers and English learners, offers personalized learning and leveled, high-interest texts tied to each Collection's topic.
- Level-up Tutorials offer diagnoses and remediation on key skills for reading literature and informational text.

- Language Workshop for English Language Development provides instruction and opportunity for students to master collaboration, interaction, and language production as they develop English language skills.

IACA intends to utilize iReady Diagnostic for conducting periodic progress monitoring checks. It is our understanding this is the same tool used by the district for this purpose. The i-Ready online program is used to diagnose students' strengths and weaknesses in phonemic awareness, phonics, high frequency words, vocabulary, and comprehension, using both literary and informational passages. The program provides an individual instructional path that may be implemented online for individual students or face-to-face in small groups or one-to-one settings. The instructional path meets the students at their current reading level, adapting instruction by either accelerating or remediating depending on the students need. Effective use of the tool will prevent any undue delay in providing needed supports to struggling students and determining the most appropriate next steps to ensure proper student placement.

The district's assessment calendar will be followed. At the elementary level, beginning of year (BOY) assessments will be conducted via FLKRS/Star Early Literacy (incoming kindergarteners), Developmental Reading Assessment (DRA) (kindergarten through grade two) and iReady (kindergarten through grade five). Middle of year (MOY) assessments will include DRA (kindergarten through grade 2), iReady, (kindergarten through grade five), and QSMA (grades three through five, December and March). Ongoing progress monitoring will be conducted using running records, i-Ready, or other method determined effective by the school's MTSS leadership team. If applicable, students receiving interventions through programs that have embedded progress monitoring measures will participate in those assessments. The FSA ELA will be used to measure end of year (EOY) outcomes for grades three through five; i-Ready will be used to measure EOY outcomes for students in kindergarten through grade two.

Students who exhibit a substantial deficiency in reading based upon screening, diagnostic, progress monitoring, or assessment data; statewide assessments; or teacher observations will be provided with increasingly intensive instruction matched to their needs on the basis of levels of performance and rates of progress. The district's decision tree for reading interventions will be used (included in this attachment). The proposed instructional materials for both elementary and middle grades include a robust array of supplemental instructional materials and strategies to support struggling learners, including multisensory approaches.

At the middle school level, students who performed at Level 2 or below on the prior year's FSA ELA will be administered the iReady at the established times throughout the year. Students who

have intervention needs in the areas of decoding and/or text reading efficiency will have extended time for reading intervention. This extended time may include, but is not limited to, an elective course in reading to accelerate foundational reading skills. The teacher will be highly qualified to teach reading or working toward that status (pursuing the reading endorsement or K-12 reading certification) and classroom infrastructure (e.g., class size; materials) will be appropriately matched to the course. An intensive reading intervention course will include such things as:

- whole group explicit instruction
- small group differentiated instruction
- independent reading practice monitored by the teacher
- focus on informational text at a ratio matching the FSA ELA

Students who are not in need of decoding or text reading efficiency will receive instruction in content area classes through a content area reading intervention or be enrolled in a language arts course in which reading strategies are incorporated or an intensive reading elective course.

Specific supplemental materials will be determined based on the area of need, student grade or reading level, English language proficiency, and other relevant factors. The specific supplemental and intensive interventions to be implemented will be determined by the MTSS leadership team or the individual student's problem solving team implementing the problem solving process to target interventions to address identified deficit skill areas. In addition to the instructional support materials included within the core program, comprehensive and supplemental intervention reading programs strategies, and measurement tools that will be in the school's literacy toolkit based upon the unique needs of individual and targeted groups of students include:

- Center for the Collaborative Classroom's Systematic Instruction in Phonological Awareness (SIPPS), including Intensive Multisensory Instruction for SIPPS (provides enhancements to the standard routines that are found to be more effective for students with dyslexia and other significant reading challenges), and SIPPS Plus (designed for students in grades four through 12 who are reading at a first or early second grade level)
- iReady Tools for Instruction
- Curriculum Associate's Ready Florida – LAFS
- ReadWorks® (free online library of high quality curated nonfiction and literary articles, reading comprehension and vocabulary lessons, formative lessons, and teacher guidance and resources)
- FCRR Student Center Activities (free access to activities for kindergarten through grade five, including a teacher resource guide, activity plans, activity masters, and PD through online videos)
- Fast ForWord
- System 44 (targeted instruction and intervention for older readers struggling with basic skills)
- Read 180 (targeted instruction and intervention focused on fluency, vocabulary, and comprehension for struggling readers)

Marion County Public Schools: Elementary Decision Tree

ALL STUDENTS – Tier 1 Instruction and Collect and Monitor Performance Data

Kindergarten: Developmental Reading Assessment (DRA2), iReady Reading Diagnostic, FLKRS
1st Grade/2nd Grade: Developmental Reading Assessment (DRA2), iReady Reading Diagnostic
3rd Grade/4th Grade/5th Grade: iReady Reading Diagnostic, Quarterly Standards Mastery Assessments (QSMA), FSA-ELA

Determinations of Strengths and Weaknesses / Determine Placement on Continuum:

- Engage in PMP meeting and based upon multiple data sources (listed above) determine strengths and weaknesses for each individual student
- Team decides individual student placement on the Marion County MTSS/Intervention Continuum (see attached)
- If it is determined that the student is placed on a step that precedes "on" level, indicating a deficit area in reading, move to Tier 2 support

For Students Not Responding to Tier 1 Instruction: Tier 2 Support

- **Notify the parents of the reading deficiency, using letters as required in Section 1008.25, and work on individualized, specific, targeted skills based on multiple data sources in order to build foundational skills, phonics/decoding, fluency, and comprehension skills and abilities.**
- Provide differentiated, small group and/or individualized instruction
- Progress Monitor and graph data
- Evaluation of data in review meetings to determine response to intervention

For Students Responding to Tier 1 Instruction:
"On" and "Beyond" Level – Enrichment

- Provide differentiated, small group and/or individualized instruction
- Monitor progress

For Substantially Deficient Students:
Tier 3 Instruction

- **Notify parent of substantial reading deficiency, using letters as required in Section 1008.25, and provide multi-sensory, small group and intensive intervention in letter naming, letter sounds, phonological awareness, word study/word recognition, decoding strategies, fluency and/or comprehension strategies as appropriate per student.**
- Progress Monitor and graph data
- Evaluation of data in review meetings to determine response to intervention
- If student not responding – begin referral for evaluation in conjunction with Problem Solving Team including parent.

For Students Not Responding to Tier 2 Instruction:
Problem Solving Team

- Adjust current intervention; ICEL (i.e. time, intensity, program, delivery, group size) and continue Tier 2 Support
- **OR**, move to Tier 3 Support

For Students Responding to Tier 2 Instruction:
Reassess Needs

- Engage in PMP meeting(s); team determines next steps for different intervention or move to "On" or "Beyond" enrichment

Note: In select cases, an administrator will initiate a Problem Solving Team (PST) meeting for immediate intensive intervention placement if all data points indicate a student is performing two or more years below grade level.

<table>
<tr><th colspan="2">Performance Data Indicators
In Marion County, teachers will use multiple data points to determine if a student is in need of reading intervention.</th></tr>
<tr><td>Developmental Reading Assessment (DRA)</td><td>

Assessed Grade(s): Kindergarten through 2nd
Format: Individually administered by teacher 1:1
Measures: Accuracy, fluency, and comprehension
Timing: Beginning of Year - BOY (Aug/Sept) and Middle of Year - MOY (Jan/Feb)
Scoring:

One level below ideal for the time of administration – may need intervention
Two or more levels below ideal for the time of administration – most likely will need intervention

<table>
<tr><th colspan="10">DRA by Grade Level Comparison Chart</th></tr>
<tr><td rowspan="2">Level</td><td colspan="4">Kdg</td><td colspan="5">1st</td></tr>
<tr><td>A – 1
BOY</td><td>2 – 3
MOY</td><td>4
EOY</td><td>6 | 8
BOY</td><td colspan="2">10 | 12
MOY</td><td colspan="2">14 | 16
EOY</td></tr>
<tr><td rowspan="2">Level</td><td colspan="3">2nd</td><td colspan="7" rowspan="2"></td></tr>
<tr><td>18
BOY</td><td colspan="2">20 | 24
MOY</td><td>28
EOY</td></tr>
</table>
</td></tr>
<tr><td>Florida Kindergarten Readiness Screener (FLKRS)</td><td>

Assessed Grade(s): Kindergarten
Format: Teacher inventory
Measures: Readiness
Timing: Beginning of Year – BOY (Aug/Sept)
Scoring: 497-529 – may need intervention | 438-496 – most likely will need intervention | 437 or below – will need intervention

</td></tr>
<tr><td>iReady</td><td>

Assessed Grade(s): Kindergarten through 5th for AP1 and AP2 / AP3 – K-3, select 4th and 5th
Format: Adaptive computer
Measures: Reading domains
Timing: Beginning of Year (AP1) – August / Middle of Year (AP2) – January / End of Year (AP3) – April-May
Scoring: See MCPS K-2 Grade Proficiencies or MCPS 3-5 Grade Proficiencies charts (attached)

</td></tr>
<tr><td>District Assessments: Quarterly Standards Master Assessment (QSMA)</td><td>

Assessed Grade(s): 3rd through 5th
Format: Paper-pencil individual assessment
Measures: Reading standards
Timing: End of 1st (October), 2nd (December), and 3rd (March) Quarters
Scoring: Performance on QSMAs cannot solely place students in intervention, however, this data is considered in conjunction with other data points for placement in targeted interventions

</td></tr>
<tr><td>Florida Standards Assessment – ELA (FSA)</td><td>

Assessed Grade(s): 3rd through 5th
Format: Paper-pencil individual assessment
Measures: Reading standards / reports domains
Timing: End of Year – May
Scoring: Level 2 – will need intervention | Level 1 – will need intervention

</td></tr>
</table>

2019-20 MCPS K-2 Grade Proficiency Chart

When considering scores from i-Ready use the following "views": AP1 - "Beginning of the Year" view / AP2 & AP3 - "End of Year" view.
Marginal - Further Discussion & Data Reviews must include multiple data sources beyond iReady diagnostic reports.

Subject	Proficiency Level	Kindergarten	1st Grade	2nd Grade
ELA	**Proficient**	AP1 - Not applicable	AP1 - 434 and above	AP1 - 489 and above
		AP2 - 362 and above	AP2 - 434 and above	AP2 - 489 and above
		AP3 - 396 and above	AP3 - 458 and above	AP3 - 513 and above
	Marginal - Further Discussion & Data Reviews Required	AP1 - Not applicable	AP1 - 347-433	AP1 - 419-488
		AP2 - 100-361	AP2 - 347-433	AP2 - 419-488
		AP3 - 100-395	AP3 - 347-458	AP3 - 419-512
	Non-Proficient	AP1 - Not applicable	AP1 - 100-346	AP1 - 100 - 418
		AP2 - Emerging K phonological awareness	AP2 - 100-346	AP2 - 100 - 418
		AP3 - Emerging K phonological awareness	AP3 - 100-346	AP3 - 100 - 418
MATH	**Proficient**	AP1 - Not applicable	AP1 - 402 and above	AP1 - 428 and above
		AP2- 362 and above	AP2 - 402 and above	AP2 - 428 and above
		AP3 - 373 and above	AP3 - 413 and above	AP3 - 441 and above
	Marginal - Further Discussion & Data Reviews Required	AP1 - Not applicable	AP1 - 347-401	AP1 - 387-428
		AP2 - 100-361	AP2 - 347-401	AP2 - 387-428
		AP3 - 100-373	AP3 - 347-412	AP3 - 387-440
		AP1-Not applicable	AP1 - 100-346	AP1 - 100 - 386
		AP2-Emerging K numbers / operations	AP2 - 100-346	AP2 - 100 - 386
		AP3-Emerging K numbers / operations	AP3 - 100-346	AP3 - 100 - 386
SCIENCE / SOCIAL STUDIES	**Proficient**	Final passing grade of "N" or above in on-grade level course	Final passing grade of "N" or above in on-grade level course	Final passing grade of "N" or above in on-grade level course
	Non-Proficient	Final grade of "U" in on-grade level course	Final grade of "U" in on-grade level course	Final grade of "U" in on-grade level course

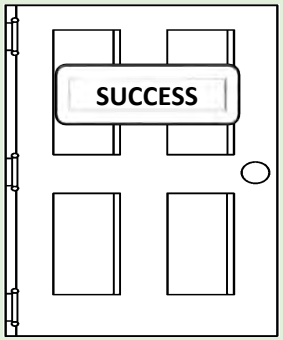
2019-20 MCPS 3-5 Grade Proficiency Chart

When considering scores from i-Ready use the following "views": AP1 - "Beginning of the Year" view / AP2 & AP3 - "End of Year" view.
Marginal - Further Discussion & Data Reviews must include multiple data sources beyond iReady diagnostic reports.

Subject	Proficiency Level	3rd Grade	4th Grade	5th Grade
ELA	**Proficient**	AP1 - 511 and above AP2 - 511 and above End Year: Level 3 and above on FSA ELA	Level 3 or above on FSA ELA	Level 3 or above on FSA ELA
	Marginal - Further Discussion & Data Reviews Required	AP1 - 474-510 AP2 - 474-510		
	Non-Proficient	AP1 - 100-473 AP2 - 100-473 End of Year: Level 1 or 2 on FSA-ELA	Level 1 or 2 on FSA ELA	Level 1 or 2 on FSA ELA
MATH	**Proficient**	AP1 - 449 and above AP2 - 449 and above End of Year: Level 3 or above on FSA-Math	Level 3 or above on FSA Math	Level 3 or above on FSA Math
	Marginal - Further Discussion & Data Reviews Required	AP1 - 413-448 AP3 - 413-448		
		AP1 - 100-412 AP2 - 100-412 End of Year: Level 1 or 2 on FSA-Math	Level 1 or 2 on FSA Math	Level 1 or 2 on FSA Math
SCIENCE / SOCIAL STUDIES	**Proficient**	Final passing grade of "C" or above in on-grade level course	Final passing grade of "C" or above in on-grade level course	Final passing grade of "C" or above in on-grade level course
	Non-Proficient	Final grade of "D" or "F" in on-grade level course	Final grade of "D" or "F" in on-grade level course	Final grade of "D" or "F" in on-grade level course

MCPS - MTSS Intervention Continuum
Language / Reading

2019-2020 SY



Foundational Skills Includes: Oral Language, Phonological Awareness, Concepts of Print	**Phonics / Decoding** Includes: High-Frequency Words	**Fluency**	**Vocabulary / Comprehension**	**On Level & Beyond**
(Kdg - 2nd)	(1st - 5th)	(2nd - 5th)	(2nd - 5th)	
Criteria Data Source:				• Core Coursework • Standards-based Research Projects using Focus Cluster • Author Studies • Advanced standards studies • Media production • Achieve 3000 (Kid Biz / Smarty Ants)
• iReady - Instructional Grouping and Individual Diagnostic Reports • DRA - Reading behaviors observed during the Oral Reading section	• iReady - Instructional Grouping and Individual Diagnostic Reports • DRA - Reading behaviors observed during the Oral Reading section	• DRA - Oral Reading - if two levels below ideal for time of administration • Fluency Checks (see report card guidelines) Non-Proficient on Grade Level wpm / lpm	• iReady - Instructional Grouping and Individual Diagnostic Reports • DRA - Comprehension - if one or two levels below ideal for time of administration • FSA - (3rd retainees, 4th & 5th) Level 1 or 2 from previous year / focus on reporting category results (points earned/points possible) • QSMA - (3rd-5th) in conjunction with other data points	
District Supported Interventions within the MTSS Block(s)				
Unless approved by the district, no other programs should be used during the official MTSS time blocks				
• CKLA-ARG (Assessment and Remediation Guide - K-2) • Reading Mastery: Language Strand (Kdg / 1st)	• CKLA-ARG (Assessment and Remediation Guide K-2) • Early Intervention in Reading (1st-2nd) • Phonics for Reading (3rd-5th) • Corrective B1 (3rd-5th) • Corrective B2 (4th-5th)	• Reading Plus (3-5) • Reading Mastery Lvl 1 (2nd-3rd) • Corrective B1 (3rd-5th) • Corrective B2 (4th-5th) • Reading Naturally	• Leveled Literacy Intervention (2-5) • ELA Ready Books, iReady Tools for Instruction, and Toolbox utilizing specific standards aligned resources • Reading Mastery Lvl 1 (2nd-3rd)	**Note:** The MCPS Elementary Curriculum Department recognizes the individual needs of all students. On a case-by-case basis, school administrators should contact the Elementary Department for specific variations to the outlined plan for individual students.
Progress Monitoring Program Specific / iReady Progress Monitoring / iReady AP Diagnositc				
Exit / Next Steps Next deficiency on the continuum or exit to on-grade level				
Teacher Led Instruction			**Teacher or Para Led Instruction**	

Elementary Reading Intervention Program Descriptions and Learner Characteristics

Program Name (Intervention Grade Level)	**Applicable Stair Step(s)**	**Multi-Sensory Code**	**Program Description**	**Learner Characteristics**	**Data Points within the Program for Monitoring Progress**
CKLA-Assessment and Remediation Guide (ARG) (Grades K-2)	• Foundational Skills • Phonics / Decoding	●	The Assessment and Remediation Guide provides direct instruction intended to reteach and reinforce foundational standards not mastered by students after Tier 1 instruction. The ARG follows a developmental progression of skills for student in kindergarten through second grade. The fidelity of Core Knowledge Skills strand for Kindergarten, First, and/or Second Grade will be required for effective usage of this intervention based on the grade level it is utilized for.	The student may display deficiencies in one or more of the following areas: • Incomplete mastery of foundational skills taught at Tier 1 • Struggles to apply phonics code knowledge taught at Tier 1 • Challenged by particular sound-spelling correspondences • (For 3rd Grade ARG) Students who are struggling with chunking multisyllabic words into smaller parts for when decoding longer words	• Progress Monitoring Assessments (end of each section)
Corrective Reading B1 and B2 (Grade 3-5)	• Phonics / Decoding • Fluency	◖	SRA's Corrective Reading strand is designed to address decoding deficits in grades 3 and higher through direct instruction. Different levels help students address a variety of issues, including identifying words, understanding how the arrangement of letters in a word relates to its pronunciation and development of adequate reading rate.	The student may display deficiencies in one or more of the following areas: • Frequent word-identification errors, especially when reading connected sentences • Mistakes include word omissions, word additions, and confusion of high frequency words • Often guesses at words, basing the guess on the word beginning or ending • Lacks understanding of the relationship between the arrangement of letters in a word and the pronunciation of the word • Reading rate is often inadequate	• Fluency Checkouts • Mastery Tests
Early Intervention in Reading (EIR) (Grades 1-5)	• Phonics / Decoding	◖	Early Interventions in Reading provides foundational skill instruction through activities aligned along five content strands: phonemic awareness, letter-sound correspondence, word recognition and spelling, fluency, and comprehension strategies.	The student may display deficiencies in one or more of the following areas: • Letter sound awareness and word blending • Applying foundational skills to connected text • Challenged by particular sound-spelling correspondences • Beginning readers in this program have some beginning oral language skills and phonemic awareness	• Mastery Assessments

Multi-Sensory Code: ●- full multi-sensory approach ◖ - contains multi-sensory elements ○ - minimal multi-sensory approach

Program Name (Intervention Grade Level)	**Applicable Stair Step(s)**	**Multi-Sensory Code**	**Program Description**	**Learner Characteristics**	**Data Points within the Program for Monitoring Progress**
iReady Tools for Instruction and Toolbox – Specific Standard-based Lessons (Grades 2-5)	• Vocabulary / Comprehension	◖	The Teacher Toolbox and Toolbox for Instruction are designed to be utilized during small group or on-to-one instruction and paired with i-Ready on-line instruction. It is a full range of K-8 instructional resources to further support skill development and meet student's need for differentiated instruction.	The student may display deficiencies in one or more of the following areas: • Vocabulary • Comprehension: Literature • Comprehension: Informational Text	• i-Ready Growth Monitoring
Leveled Literacy Intervention (Grades 3-5)	• Vocabulary / Comprehension	○	Leveled Literacy Intervention (LLI) is a small-group, supplementary intervention program designed to bring struggling readers and writers to grade-level competency.	The student may display deficiencies in one or more of the following areas: • Vocabulary • Comprehension: Literature • Comprehension: Informational Text	• i-Ready Growth Monitoring • In-program monitoring assessments
Phonics for Reading (Grades 3-5)	• Phonics / Decoding	○	Phonics for Reading is intended for use in grades 3-5 for students who struggle with reading comprehension from weak phonemic awareness and decoding skills. The systematic, explicit instruction builds confidence and motivation among students who have identified deficiencies to build phonemic awareness, decoding, and fluency skills to strengthen reading comprehension.	The student may display deficiencies in one or more of the following areas: • Frequent word-identification errors, especially when reading connected sentences • Mistakes include word omissions, word additions, and confusion of high frequency words • Often guesses at words, basing the guess on the word beginning or ending • Lacks understanding of the relationship between the arrangement of letters in a word and the pronunciation of the word • Reading rate is often inadequate	• Checking Up Progress Monitoring (Accuracy Check) • Fluency Assessments (Level 2 and 3)
Read Naturally (Grades 2-5)	• Fluency	◖	Read Naturally accelerates reading achievement by using research-based fluency strategies. Students become confident readers by developing fluency skills while reading interesting nonfiction reading passages.	The student may display deficiencies in one or more of the following areas: • Reads text in a slow, labored pace • Inadequate reading rate **Accuracy rate should be 95% or higher**	• Fluency and Retell Graphs

Multi-Sensory Code: ●- full multi-sensory approach ◖ - contains multi-sensory elements ○ - minimal multi-sensory approach

Program Name (Intervention Grade Level)	**Applicable Stair Step(s)**	**Multi-Sensory Code**	**Program Description**	**Learner Characteristics**	**Data Points within the Program for Monitoring Progress**
Reading Mastery Language Strand (Grades K-1)	• Foundational Skills	●	SRA Reading Mastery Language is a Direct Instruction approach for the explicit teaching of necessary language concepts. The Language Strand teaches the oral language skills necessary to understand what is said, written, and read in the classroom.	The student may display deficiencies in one or more of the following areas: • Difficulty constructing sentences that describe what they want to do • Difficulty constructing sentences that describe what they are and were doing • Difficulty constructing sentences that describe what and where things are	• Mastery Tests
Reading Mastery Reading Strand Level 1 (Grades 2-3)	• Fluency • Vocabulary / Comprehension	◖	SRA Reading Mastery Level 1 is a reading program that uses Direct Instruction to help students master essential fluency and comprehension skills. Level 1 addresses all five essential components of reading and develops decoding, word recognition, and comprehension skills that transfer to other subject areas.	The student may display deficiencies in one or more of the following areas: • Reads text in a slow, labored pace • Inadequate reading and accuracy rate • Vocabulary • Comprehension	• Fluency Checkouts
Reading Plus (Grades 2-5)	• Fluency	○	Reading Plus is an adaptive literacy intervention for grades 3 and up. The program focuses on training student eyes smoothly and comfortably over lines of text at an appropriate rate.	The student may display deficiencies in one or more of the following areas: • Reads text in a slow, labored pace • Inadequate reading rate	• Fluency Checkouts • In-program assessment checkpoints
Ready Books – Specific Standard-based Lessons (Grades K-5)	• Vocabulary / Comprehension	○	Ready English Language Arts is teacher-led instruction that uses a consistent Read, Think, Talk, Write model. Lessons are scaffolded to develop critical thinking and analytical comprehension skills.	The student may display deficiencies in one or more of the following areas: • Vocabulary • Comprehension: Literature • Comprehension: Informational Text	• i-Ready Growth Monitoring

Multi-Sensory Code: ●- full multi-sensory approach ◖ - contains multi-sensory elements ○ - minimal multi-sensory approach

Marion County Public School Middle School Intensive Reading Placement

Student scores a level 3 or above on the FSA-ELA: Student will receive instruction in an ELA class. Additional support will be offered via content-area literacy to include document based questions in Social Studies, close read lessons in ELA, and 5 E's lessons in Science.

Student scores a Level 1 or 2 on the FSA-ELA OR does not have FSA-ELA assessment data and a reading deficiency is identified: See decision tree below

Students need a separate reading course if they do not meet the requirements for CAR-PD

(See *Program/Course Descriptions, Learner Characteristics, and Data Points* on pages 2-4 for placement criteria)

Students need a **100-minute intervention** if they display a deficiency in text-reading efficiency and still need help in fluency, phonics, and/or phonological awareness, in addition to vocabulary and comprehension. The 100-minute scheduling requirement can be met with a 100-minute intervention block **OR** 50 minutes of an appropriate intervention (listed below) AND a CAR-PD course.

Options include:

- Fast ForWord
- System 44
- Read 180 Universal

Students are eligible for a **50-minute** intervention, through intensive reading or a research course, if they display text-reading efficiency and only need intervention in the areas of vocabulary and comprehension.

Options include:

- Read to Achieve
- Escalate

Students are eligible to receive their reading intervention through CAR-PD placement if they only need support in vocabulary and comprehension as evidenced by:

Score of 140 WCPM with 95% accuracy on grade level oral reading probe AND score 23 correct answers with 95% accuracy on Maze

All students will be monitored 3x per year using the i-ready diagnostic and/or the Marion County Quarterly Standards Mastery Assessment (QSMA). Intervention support will be adjusted as need is indicated by these assessments, as well as in-program data sources.

Program/Course Descriptions, Learner Characteristics, and Data Points

Program/Course Name	Description	Learner Characteristics	Data Points
Fast ForWord	Fast ForWord is a web-based program that builds foundational language and cognitive skills by first addressing memory, attention and processing speed.	• Displays processing difficulties • Difficulty discriminating between similar sounding phonemes	• I-Ready benchmark data indicates a K-1 placement on phonics and/or a need for phonological awareness instruction • Pre-decoder level on the Phonics Inventory
System 44	System 44 is a foundational reading program intended for students in grades 3-12. The adaptive technology component of this blended-learning model takes students through differentiated skill instruction and practice in the alphabetic code, word strategies, sight words, and writing. Teacher-led instruction focuses on reading, writing, speaking and critical thinking skills.	The student displays deficiencies in one or more of the following areas: • Phonemic awareness • Letter names • Letter-sound correspondence • Foundational phonics • Fluency • Vocabulary • Comprehension	• Phonics Inventory placement of pre-decoder, beginning decoder or developing decoder • Reading Inventory score below 600 • I-ready benchmark data indicates a 1-2 placement for phonics
Read 180 Universal	Read 180 Universal develops fluency, academic vocabulary, and text comprehension in students. Students participate in both whole group instruction and center rotations. Rotations include time spent in teacher-led small group, independent reading, and instructional software (personalized based on student level and performance).	• Does not display decoding deficiencies • Oral reading fluency skills are below grade-level, impeding vocabulary attainment and comprehension	• Reading Inventory score of at least 600 (or if Reading Inventory score is below 600 and the student scores an advanced decoder placement on the Phonics Inventory, Read 180 Universal is appropriate) • Oral Reading score on grade-level probe is below 130 WCPM, but with at least 95% accuracy • I-ready benchmark data shows that the student has tested out of phonological awareness; the student tests out of phonics or has a level 3 placement

Read to Achieve (6th-8th grade, can be mixed)	Students work daily with content examples that reflect the structure and layout of science and social studies texts, developing comprehension strategies that can be applied in content area classes. A gradual release model is used to scaffold student learning over the course of the program. In the final units students begin applying strategies to their actual content area text books.	• Does not display any decoding deficiencies • Oral reading skills are on grade-level, or just below • Low vocabulary and/or comprehension	• Oral Reading score is between 120 and 130 WCPM, with at least 95% accuracy • I-ready benchmark data shows that the student has tested out of phonological awareness and phonics
Escalate* (6th-8th grade, pure classes)	Escalate English focuses on increasing academic language proficiency via access to both digital and print content.	• Does not display any decoding deficiencies • Strong oral reading fluency skills • Low vocabulary and/or comprehension	• Oral Reading score on grade-level probe is at least 130 WCPM with 95% accuracy • Maze score is below 23 correct responses and/or accuracy is below 95% • I-ready benchmark data shows that the student has tested out of phonological awareness and phonics
CAR-PD	Students receive reading support through a content area class with a CAR-PD certified teacher. This teacher has received specialized training in how to support students in developing essential reading and writing skills.	• Does not display any decoding deficiencies • Strong oral reading fluency skills • Slight vocabulary and/or comprehension deficits	• Oral Reading score on grade-level probe is at least 140 WCPM with 95% accuracy • Maze score is 23 or more correct answers with at least 95% accuracy • I-ready benchmark data shows that the student has tested out of phonological awareness and phonics

*These classes also engage students in close reading opportunities via Document Based Questions (DBQ) and Comprehension Instructional Sequence (CIS) lessons four times per year.

Indicates Tier 3 Intervention

Indicates Tier 2 Intervention

Attachment F: Assessment Schedule

2019–2020 Uniform Statewide Assessment Calendar

According to Section 1008.22(7)(c), Florida Statutes (F.S.), and State Board of Education Rule 6A-1.094224, Florida Administrative Code (F.A.C), each school district must complete this uniform calendar with district-required assessment information, publish the calendar to the district website, and provide it to the Department by October 1 of each school year, beginning in 2016–17. Districts must provide completed calendars to schools and include the calendar in their parent guides. In addition, each school must publish the completed calendar on its website.

The statewide assessment information in sections 3 and 4 should not be altered; however, districts may otherwise modify and populate this template to accurately indicate their assessment schedules for the school year.

1. Glossary of Assessment Terms

The following glossary includes definitions of assessment terms and explanations of acronyms used throughout this template. Districts may add rows as needed for additional glossary terms that are specific to district-required assessments. Do not modify any other information in this section.

Acronym/Term	Definition
ACCESS for ELLs	Assessing Comprehension and Communication in English State-to-State (ACCESS) for English Language Learners (ELLs)
Accommodation	Per Rule 6A-1.0943, F.A.C., "Accommodations are defined as adjustments to the presentation of the statewide standardized assessment questions, methods of recording examinee responses to the questions, scheduling for the administration of a statewide standardized assessment to include amount of time for administration, settings for administration of a statewide standardized assessment, and the use of assistive technology or devices to facilitate the student's participation in a statewide standardized assessment."
CBT	Computer-Based Test
CSMA	Comprehensive Standards Mastery Assessment
Diagnostic	Assessments that measure students' understanding of a subject area or skills base, which allow teachers and educators to evaluate student learning, focusing on strengths and areas of need
District Window	The selected dates within the statewide window during which a district will administer a given assessment
District-Required Assessments	Assessments required by the school district for students in a specific grade or course
ELA	English Language Arts
EOC	End-of-Course
Evaluative	Assessments that measure student proficiency at selected intervals in order to compare change over time and to compare state-level results
FAIR	Florida Assessments for Instruction in Reading
FLKRS	Florida Kindergarten Readiness Screener
Formative	Formative assessments are the formal and informal ways that teachers and students gather and respond to evidence of student learning. Formative assessments are part of teaching in the classroom. Formative assessments will not result in a score that will appear on a student's report card, but they serve the greater purpose of informing both students and teachers on what changes need to happen in classroom instruction to better serve the needs of individual students.
FSA	Florida Standards Assessments
FSAA	Florida Standards Alternate Assessment

2019–2020 Uniform Statewide Assessment Calendar

Acronym/Term	Definition
Interim	Interim assessments are administered on a smaller scale (i.e., school or district) with results that can be used at the classroom level or aggregated at the school- or district-level. Depending on the design, interim assessments can be used to predict a student's ability to succeed on a summative assessment, to evaluate a program, or to diagnose student learning gaps.
i-Ready	Assessment that measure students' understanding of a subject area or skills base, which allow teachers and educators to evaluate student learning, focusing on strengths and areas of need
NAEP	National Assessment of Educational Progress
NGSSS	Next Generation Sunshine State Standards
PBT	Paper-Based Test
Progress Monitoring	Process used to determine whether a student's academic performance is improving, at what rate it is improving, and how effective instruction has been
PSAT/NMSQT	Preliminary SAT/National Merit Scholarship Qualifying Test
QSMA	Quarterly Standards Mastery Assessment
Summative	Assessments that evaluate student mastery of Florida's academic standards at or near the conclusion of the course of instruction
Statewide, Standardized Assessments	All assessments required by s. 1008.22, F.S.
Statewide Window	The range of dates during which districts and/or schools may choose to administer a given assessment
Testing Time	The amount of time individual students are each given to respond to test items on each test
VAM	A Value-Added Model (VAM) is used by some school districts as part of their educator evaluation system. It is also used in the approval process for teacher preparation programs, as part of the criteria for teachers to qualify for a financial award under the Florida Best and Brightest Teacher Scholarship program and as part of the criteria to extend an educator's temporary teaching certificate.
VPK	Florida's Voluntary Prekindergarten Education Program

2. Test, Type, and Purpose/Use

Add rows as needed to define district-required tests, test type, and their purpose/use in your district. If additional types are added, define applicable types in the glossary. Do not modify any other information in this section.

Test	Type	Purpose/Required Use	Statutory Authority/Required Use Citation
ACCESS for ELLs 2.0	Diagnostic	Measure English language acquisition of ELLs	s. 1003.56, F.S. Rule 6A-6.0902, F.A.C. Rule 6A-6.09021, F.A.C. Rule 6A-6.0903, F.A.C.
Alternate ACCESS for ELLs	Diagnostic	Measure English language acquisition of ELLs with significant cognitive disabilities	
CSMA	Summative	Assess mastery of Florida standards	s. 1008.25, F.S
DRA	Summative	Provides strengths/weaknesses in areas of reading, guides instruction	s. 1008.25, F.S

2019–2020 Uniform Statewide Assessment Calendar

Test	Type	Purpose/Required Use	Statutory Authority/Required Use Citation
FAIR	Diagnostic/Progress Monitoring	Provides general estimates of students' reading ability/monitors students' progress toward meeting grade-level skills in reading	s. 1008.25(4), F.S.
FLKRS	Diagnostic/Progress Monitoring	Determine readiness for kindergarten; used to calculate VPK Provider Kindergarten Readiness Rates	s. 1002.69, F.S. Rule 6M-8.601, F.A.C.
FSA	Summative	Purpose: Measure student achievement of Florida's academic standards (Florida Standards, Next Generation Sunshine State Standards) Required uses: third grade retention; high school standard diploma; EOC assessments as 30% of course grade; school grades; school improvement rating; district grades; differentiated accountability; VAM; scholar designation; Credit Acceleration Program; school improvement plans; school, district, state, and federal reporting	s. 1002.38, F.S. s. 1003.4156, F.S. s. 1003.4282, F.S. s. 1004.04, F.S. s. 1004.85, F.S. s. 1008.22, F.S. s. 1008.25, F.S. s. 1008.33, F.S. s. 1008.34, F.S. s. 1008.341, F.S. s. 1012.34, F.S. s. 1012.56, F.S. s. 1012.731, F.S. Rule 6A-1.09422, F.A.C. Rule 6A-1.094221, F.A.C. Rule 6A-1.094222, F.A.C. Rule 6A-1.0943, F.A.C. Rule 6A-1.09432, F.A.C. Rule 6A-1.09981, F.A.C. Rule 6A-1.099811, F.A.C. Rule 6A-1.099822, F.A.C. Rule 6A-5.0411, F.A.C.
FSAA	Summative		
NGSSS EOC	Summative		
Statewide Science Assessment	Summative		
NAEP	Evaluative	Measure student performance for comparison among state and national populations over time	s. 1008.22, F.S.
PreACT	Summative	Inform course placement	s. 1007.35, F.S.
PSAT/NMSQT	Summative	Inform course placement	s. 1007.35, F.S.
QSMA	Formative	Measures mastery of instructed Florida State Standards to show strengths and weaknesses and help guide instruction	s. 1008.25, F.S

2019–2020 Uniform Statewide Assessment Calendar

3. Required Statewide Assessments

The following assessments are required for students as indicated in the Students to Be Tested column.

Populate the **District Window** column for each assessment in the table below. Do not modify any other information in this section. When calculating total test time in Section 6, do not include times for assessments indicated by grey rows, which indicate duplicate assessment windows (e.g., EOCs), assessments that take the place of another assessment, or assessments that do not have a specified testing time.

Assessment	Students to Be Tested	Statewide Window	District Window	Mode	Testing Time	Results Expected
FLKRS	Kindergarten	July 8–October 11, 2019	**Aug. 26-Sept. 23**	CBT[1]	15–20 minutes	Immediately following test completion
FSAA—Datafolio[4]	Grades 3–10 ELA (Reading & Writing); Grades 3–8 Mathematics; Grades 5 & 8 Science; and Algebra 1, Biology 1, Civics, Geometry, & U.S. History EOCs	Collection Period 1: September–October 2019	September–October 2019	PBT	Varies/Untimed	June 2020
FSA Algebra 1 and Geometry EOC assessments	Students enrolled in associated courses	September 9–27, 2019	September 9–27, 2019	CBT[1]	180 minutes[2]	October 2019
NGSSS Biology 1, Civics, and U.S. History EOC assessments	Students enrolled in associated courses	September 9–27, 2019	September 9–27, 2019	CBT[1]	160 minutes[3]	October 2019
FSAA—Datafolio[4]	Grades 3–10 ELA (Reading & Writing); Grades 3–8 Mathematics; Grades 5 & 8 Science; and Algebra 1, Biology 1, Civics, Geometry, & U.S. History EOCs	Collection Period 2: November–December 2019	November–December 2019	PBT	Varies/Untimed	June 2020
FSA Algebra 1 and Geometry EOC assessments	Students enrolled in associated courses	December 2–20, 2019	December 2–20, 2019	CBT[1]	180 minutes[2]	January 2020

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Assessment	Students to Be Tested	Statewide Window	District Window	Mode	Testing Time	Results Expected
NGSSS Biology 1, Civics, and U.S. History EOC assessments	Students enrolled in associated courses	December 2–20, 2019	December 2–20, 2019	CBT[1]	160 minutes[3]	January 2020
FSAA—Datafolio[4]	Grades 3–10 ELA (Reading & Writing); Grades 3–8 Mathematics; Grades 5 & 8 Science; and Algebra 1, Biology 1, Civics, Geometry, & U.S. History EOCs	Collection Period 3: March–April 2020	March–April 2020	PBT	Varies/Untimed	June 2020
FSAA—Performance Task[5]	Grades 3–8 ELA & Mathematics; Grades 4–8 Writing; Grades 5 & 8 Science; and Civics EOC	March 2–April 17, 2020	March 2–April 17, 2020	PBT	Varies/Untimed	June 2020
FSAA—Performance Task[5]	Grades 9 & 10 ELA; Grades 9 & 10 Writing; and Algebra 1, Biology 1, Geometry, and U.S. History EOCs	March 16–May 1, 2020	March 16–May 1, 2020	PBT	Varies/Untimed	June 2020
FSA ELA – Reading	Grade 3	April 1–14, 2020	April 1–14, 2020	PBT	160 minutes	May 2020
FSA ELA – Writing	Grades 4–6	April 1–14, 2020	April 1–14, 2020	PBT	120 minutes	June 2020
FSA ELA – Writing	Grades 7–10	April 1–14, 2020	April 1–14, 2020	CBT[1]	120 minutes	June 2020
FSA ELA – Reading	Grades 7–10	May 1–29, 2020	May 1–29, 2020	CBT[1]	Grades 7–8 Reading: 170 minutes Grades 9–10 Reading: 180 minutes	June 2020
FSA Mathematics	Grades 7 and 8	May 1–29, 2020	May 1–29, 2020	CBT[1]	180 minutes	June 2020

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Assessment	Students to Be Tested	Statewide Window	District Window	Mode	Testing Time	Results Expected
FSA ELA – Reading	Grades 4–6	May 4–15, 2020	May 4–15, 2020	PBT	Grades 4–5 Reading: 160 minutes Grade 6 Reading: 170 minutes	June 2020
FSA Mathematics	Grades 3–6	May 4–15, 2020	May 4–15, 2020	PBT	Grades 3–5 Mathematics: 160 minutes Grade 6 Mathematics: 180 minutes	June 2020
NGSSS Statewide Science Assessment	Grades 5 and 8	May 4–15, 2020	May 4–15, 2020	PBT	160 minutes	June 2020
FSA Algebra 1 and Geometry EOC assessments	Students enrolled in associated courses	May 1–29, 2020	May 1–29, 2020	CBT[1]	180 minutes[2]	June 2020
NGSSS Biology 1, Civics, and U.S. History EOC assessments	Students enrolled in associated courses	May 1–29, 2020	May 1–29, 2020	CBT[1]	160 minutes[3]	June 2020
FSA Algebra 1 and Geometry EOC assessments	Students enrolled in associated courses	July 13–24, 2020	July 13–24, 2020	CBT[1]	180 minutes[2]	August 2020
NGSSS Biology 1, Civics, and U.S. History EOC assessments	Students enrolled in associated courses	July 13–24, 2020	July 13–24, 2020	CBT[1]	160 minutes[3]	August 2020

[1] Paper-based accommodations (e.g., regular print, large print, braille, one-item-per-page) for computer-based tests are available to eligible students if indicated as an accommodation on an IEP or Section 504 plan.

[2] Any student taking an FSA EOC assessment who has not completed a session by the end of the allotted time may continue working up to half the length of a typical school day.

[3] Any student taking an NGSSS EOC assessment who has not completed the session by the end of the allotted time may continue working; however, testing must be completed within the same school day.

[4] The FSAA—Datafolio is designed for students with significant cognitive disabilities for whom participation in the general statewide assessment or the FSAA—Performance Task is inappropriate, even with accommodations.

[5] The FSAA—Performance Task is designed for students with significant cognitive disabilities for whom participation in the general statewide assessment is inappropriate, even with accommodations.

2019–2020 Uniform Statewide Assessment Calendar

4. Statewide Assessments for SELECT Students

The following assessments are only intended for selected students/students in certain sub-groups. Populate the **District Window** column for the assessments in the table below. If an assessment is not being administered in your district, indicate "N/A" in the District Window column. Do not modify any other information in this section.

Because the tests included in this section are not administered to all students or, in some cases, are optional for students, the testing time for these tests should not be included in the total testing time calculated in Section 6.

Assessment	Applicable Students[4]	Statewide Window	District Window	Mode	Testing Time	Results Expected
FAIR	Grades 3–12	Assessment Period (AP) 1: August 1–November 1, 2019	**N/A**	CBT[1]	45 minutes	1 week after
PreACT	Grade 10	September–December 2019	**N/A**	PBT	150 minutes	Approximately 2 weeks after testing
ELA Grade 10 Retake – Writing		September 9–20, 2019	September 9–20, 2019	CBT[1]	120 minutes[2]	December 2019
ELA Grade 10 Retake – Reading		September 9–27, 2019	September 9–27, 2019	CBT[1]	180 minutes[2]	December 2019
PSAT/NMSQT	Grade 10	October 16, 2019	October 16, 2019	PBT	165 minutes	January 2020
FAIR	Grades 3–12	AP 2: November 4, 2019–February 14, 2020	**N/A**	CBT[1]	45 minutes	1 week after
FSA ELA Writing Field Test	Grades 4–6	November 18–December 20, 2019; January 6–31, 2020	November 18–December 20, 2019; January 6–31, 2020	PBT	120 minutes	Results Not Reported
FSA ELA Writing Field Test	Graces 7–10	November 18–December 20, 2019; January 6–31, 2020	November 18–December 20, 2019; January 6–31, 2020	CBT	120 minutes	Results Not Reported
ACCESS for ELLs 2.0	Grades K–12 currently classified as ELL with "LY" code	January 27–March 20, 2020	January 27–March 20, 2020	PBT	Kindergarten: 45 minutes Grades 1–12: 105–245 minutes (varies by grade-level/tier)	June 2020

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Assessment	Applicable Students[4]	Statewide Window	District Window	Mode	Testing Time	Results Expected
Alternate ACCESS for ELLs	Grades 1–12 with significant cognitive disabilities and currently classified as ELL with "LY" code	January 27–March 20, 2020	January 27–March 20, 2020	PBT	80 minutes	June 2020
NAEP	Pilot Assessments: Grades 4, 8, and 12	January–March 2020	January–March 2020	CBT	90–120 minutes	Results not reported for pilot assessments
FAIR	Grades 3–12	AP 3: February 17–June 12, 2020	**N/A**	CBT[1]	45 minutes	1 week after
ELA Grade 10 Retake – Writing		February 24–March 13, 2020	February 24–March 13, 2020	CBT[1]	120 minutes[2]	May 2020
ELA Grade 10 Retake – Reading		February 24–March 13, 2020	February 24–March 13, 2020	CBT[1]	180 minutes[2]	May 2020
FSA Algebra 1 Retake EOC[5]		February 24–March 13, 2020	February 24–March 13, 2020	CBT[1]	180 minutes[2]	May 2020

[1] Paper-based accommodations (e.g., regular print, large print, braille, one-item-per-page) for computer-based tests are available to eligible students if indicated as an accommodation on an IEP or Section 504 plan.

[2] Any student taking an FSA ELA Retake or EOC assessment who has not completed a session by the end of the allotted time may continue working up to half the length of a typical school day.

[3] Any student taking an NGSSS EOC assessment who has not completed the session by the end of the allotted time may continue working; however, testing must be completed within the same school day.

[4] If indicated, "applicable students" relates to the sub-group(s) of students who *may* take that assessment; it does not indicate that all students throughout the state in that sub-group will take that assessment. Assessments for which no applicable student group is listed are available to students as needed but are not limited to any specific sub-group.

[5] The FSA Algebra 1 EOC Assessment is only offered as a separate Retake assessment during the Spring administration; students retaking the FSA Algebra 1 EOC in Fall, Winter, or Summer participate in the regular EOC administration.

2019–2020 Uniform Statewide Assessment Calendar

5. District-Required Assessment Information

Complete the table below with assessments that are required for all schools in your district.

Assessment		Students to Be Tested	District Window	Mode	Testing Time (per window)	Results Expected
Comprehensive Standards Mastery Assessment (CSMA)	Art	Grades 2 and 4	Aug. 26-Sept. 20 April 23-May 1	PBT	50 minutes	Immediately following completion
	Music					
	Physical Education					
	8th Grade Science , Biology	Students enrolled in associated courses	Dec. 2-Dec. 19 for Semester 1 courses only May 1-May 28 for Non-State Assessed Courses	PBT	50 minutes	
	Civics, U.S. History					
	Algebra 1, Geometry					
	Select Non-State Assessed Elective Courses					
	Science	Grade 5	Jan. 27-Jan. 31	PBT	90 minutes	
Developmental Reading Assessment (DRA)		Grades K-2	Aug. 12-Sept. 13 Jan. 7-Feb.7	PBT	60 minutes	1 week after
i-Ready	ELA	Grades K-3	Aug. 13-Aug. 30 Jan. 7-Jan. 24 Apr. 1-May 28	CBT	45 minutes	Immediately following completion
	Math					
	ELA	Grades 4-5	Aug. 13-Aug. 30 Jan. 7-Jan. 24			
	Math					
Quarterly Standards Mastery Assessment (QSMA)	ELA (3-10)	Students enrolled in associated courses	Sept.30-Oct. 10 Dec. 2-Dec. 19 March 2-March 13	PBT/CBT	Grades 3-5: 90 minutes Grades 6-11: 50 minutes	Immediately following completion
	Math (3-8), Algebra 1, Geometry					
	Civics, US History					
	Science (3-8), Biology					
Writing		Grades 3-5	Sept. 9-13 Nov. 11-15 Feb. 10-14	PBT	120 minutes	Within 3 weeks

2019–2020 Uniform Statewide Assessment Calendar

6. Estimates of Total Testing Time by Grade Level

Estimates of average time for administering state-required and district-required assessments (listed in Sections 3 and 5 above) by grade level. Subject-based assessments should be included with the grade level to which they are most likely to be administered (e.g., Biology 1 with grade 9).

Grade Level	Statewide Assessments	District Assessments	Approximate Total Testing Time (In Minutes)
K	15–20	390	410
1	0	390	390
2	0	690	690
3	320	1440	1760
4	440	1650	2090
5	600	1440	2040
6	470	650	1120
7	630	800	1430
8	630	650	1280
9	640	550	1190
10	480	700	1180
11	160	450	610
12	0	300	300

2019-2020 Marion County Public Schools Assessment Calendar - All Grades

Assessment Windows	Test			Assessment		Students Assessed
	Nat'l	State	District			
Year Round		✓		PERT*		Select students
Year Round			✓	CSMA Performance Tasks***		Students in select CTE courses
Aug 12-Sept 13			✓	DRA Full battery		Grades K-2
Aug 13-23			✓	CSMA	Physical Science (Grade 8), Biology 1	Students in designated courses
					Civics, U.S. History	
					Algebra 1, Geometry	
					CTE	Students in select CTE courses
Aug 13-30			✓	i-Ready Diagnostic AP1 - ELA, Math		Grades K-5, Select students Grades 6-8
Aug 26-Sept 20		✓		VPK Assessment AP1 - ***District dates - Aug. 26 - Sept. 13***		Grade Pre K
			✓	CSMA Art, Music, Physical Education Pretest		Grades 2 & 4
Aug 26-Sept 23		✓		FLKRS		Grade K
Sept 3-6			✓	CSMA Science		Grade 5 (optional)
Sept 9-13			✓	District Demand Writing		Grades 3-5
Sept 9-20		✓		FSA Grade 10 ELA Writing Retake*		Select students Grades 11-AD
Sept 9-27		✓		FSA	Grade 10 ELA Reading Retake*	Select students Grades 11-AD
					EOCs* Algebra 1, Geometry	Select students
				NGSSS EOCs* Biology 1, Civics, U.S. History		Select students
Sept 23-27			✓	i-Ready Progress Monitoring - ELA, Math		Select students Grades K-8
	✓			SAT10		Select students Grade 3
Sept 30-Oct 10			✓	QSMA	ELA	Grades 3-10
					Math, Science	Grades 3-8
					Algebra 1, Biology 1, Civics, Geometry, U.S. History	Students in designated courses
Sept 30-Oct 18		✓		FSAA	Grade 10 ELA Makeup	Select students Grades 11-AD
					Algebra 1 EOC Makeup	Select students Grades 10-AD
Oct 1	✓			ACT Weekday		Select students Grades 11-12
Oct 16	✓			PSAT/NMSQT		Grade 10, Select students Grade 11
	✓			SAT School Day		Select students Grade 12
Oct 21-25			✓	i-Ready Progress Monitoring - ELA, Math		Select students Grades K-8
Nov 11-15			✓	District Demand Writing		Grades 3-5
Nov 18-22			✓	i-Ready Progress Monitoring - ELA, Math		Select students Grades K-8
Nov 18-Dec 19**		✓		FSA ELA Writing Field Test ***(Select schools TBD)***		Grades 4-10
Dec 2-19		✓		FSA EOCs* Algebra 1, Geometry		Select students
				NGSSS EOCs* Biology 1, Civics, U.S. History		Select students
Dec 2-19			✓	CSMA S1 Non-State Assessed Courses (multiple choice)***		Grades 6-12
				QSMA	ELA	Grades 3-10
					Math, Science	Grades 3-8
					Algebra 1, Biology 1, Civics, Geometry, U.S. History	Students in designated courses
Jan 7-17			✓	CSMA S2 CTE		Students in select CTE courses
Jan 7-24			✓	i-Ready Diagnostic AP2 - ELA, Math		Grades K-5, Select students Grades 6-8
Jan 7-31**		✓		FSA ELA Writing Field Test ***(Select schools TBD)***		Grades 4-10
Jan 7-31		✓		VPK Assessment AP2 - ***District dates - Jan. 7-24***		Grade Pre K
Jan 7-Feb 7			✓	DRA Full battery		Grades K-2
Jan 27-31			✓	CSMA Science		Grade 5 (required)
Jan 27-Mar 13		✓		ACCESS for ELLs		ELL students Grades K-12
Feb 10-14			✓	District Demand Writing		Grades 3-5
Feb 18-21			✓	i-Ready Progress Monitoring - ELA, Math		Select students grades K-8
Feb 24-Mar 13		✓		FSA	Grade 10 ELA Writing Retake*	Select students grades 11-AD
					Grade 10 ELA Reading Retake*	Select students grades 11-AD
					Algebra 1 EOC Retake*	Select students

2019-2020 Marion County Public Schools Assessment Calendar - All Grades

Assessment Windows	Test			Assessment		Students Assessed
	Nat'l	State	District			
Feb 25	✓			ACT Weekday		Select students Grades 11-12
Mar 2-13			✓	QSMA	ELA	Grades 3-10
					Math, Science	Grades 3-8
					Algebra 1, Biology 1, Civics, Geometry, U.S. History	Students in designated courses
Mar 2-Apr 17		✓		FSAA	ELA Writing	Select students Grades 4-8
					ELA Reading, Math	Select students Grades 3-8
					Science	Select students Grades 5 & 8
					Civics	Select students in designated course
Mar 24-27			✓	i-Ready Progress Monitoring - ELA, Math		Select students Grades K-8
Mar 24-May 1		✓		FSAA	ELA	Select students Grades 9-10
					Algebra 1, Biology 1, Geometry, U.S. History	Select students in designated courses
Mar 25	✓			SAT School Day		Select students Grade 12
Apr 1-14**		✓		FSA	ELA Reading	Grade 3
					ELA Writing	Grades 4-10
Apr 1-May 28			✓	i-Ready	Diagnostic AP3 - ELA	All K-2, Select students Grades 4, 6-8
					Diagnostic AP3 - Math	All K-3, Select students Grades 4-8
Apr 13-17			✓	i-Ready Diagnostic AP3 - ELA		All Grade 3 & Select students Grade 5
Apr 13-May 1			✓	CSMA Art, Music, Physical Education Posttest		Grades 2 & 4
Apr 27-May 8		✓		VPK Assessment AP3		Grade Pre K
May 1-28			✓	CSMA S2 & FYT Non-State Assessed Courses (multiple choice)***		Grades 6-12
May 1-28**		✓		FSA	ELA Reading, Math*	Grades 7-10 Reading, 7-8 Math
					EOCs* Algebra 1, Geometry	Students in designated courses
		✓		NGSSS EOCs* Biology 1, Civics, U.S. History		Students in designated courses
May 4-15**	✓			AP Exams		Students in designated courses
		✓		FSA ELA Reading, Math		Grades 4-6 Reading, 3-6 Math
		✓		NGSSS Statewide Science		Grades 5 & 8
May TBD		✓		Makeups FSA Writing		Grades 4-6 *(PBT)*, 7-10 *(PBT Accommodated)*
May 11-14	✓			SAT10 - ***District dates May 11-12***		Select students grade 3
May TBD		✓		Makeups FSA Writing*		Grades 7-10 *(CBT)*
July 13-24**		✓		FSA EOCs* Algebra 1, Geometry		Select students
				NGSSS EOCs* Biology 1, Civics, U.S. History		Select students
July TBD	✓			SAT10		Select students Grade 3

ACCESS for ELLs-Assessing Comprehension and Communication in English State-to-State for English Language Learners		
AP-Advanced Placement	**FLKRS**-Florida Kindergarten Readiness Screener	**PERT**-Postsecondary Education Readiness Test
CSMA-Comprehensive Standards Mastery Assessment	**FSA**-Florida Standards Assessments	**PSAT**-Preliminary SAT
DRA-District Reading Assessment	**FSAA**-Florida Standards Alternate Assessment	**QSMA**-Quarterly Standards Mastery Assessment
EOC-End-of-Course Assessment	**NGSSS**-Next Generation Sunshine State Standards	**SAT10**-Stanford Achievement Test Tenth Edition
ELA-English Language Arts	**NMSQT**-National Merit Scholarship Qualifying Test	**VPK**-Voluntary Prekindergarten Assessment

*Computer-Based Testing

**District Specified Dates TBD

***For Performance Tasks, refer to the *CSMA Print & Scan Schedules,* located on the SCA Portal > Local Assessment and Data > Scanning Designates

Attachment H: Articles of Incorporation

ARTICLES OF ORGANIZATION
INA A. COLEN ACADEMY, LLC

These Articles of Organization ("Articles") are adopted, effective this 28th day of January, 2020, pursuant to Chapter 605, Florida Statutes, the Florida Revised Limited Liability Company Act (the "Act"). The undersigned sets forth the following:

ARTICLE I
NAME

The name of the Limited Liability Company is Ina A. Colen Academy, LLC (the "LLC").

ARTICLE II
ADDRESS

The mailing address and principal office of the LLC is: 8435 SW 80th Street, Suite 2, Ocala, Florida 34481.

ARTICLE III
MEMBERSHIP AND FORM OF MANAGEMENT

The LLC shall be Manager-Managed within the meaning of Section 605.0407, Florida Statutes, and have a single member consisting of The Colen Family Charitable Trust (the "Member"). The Member is, or has applied to be, a Federal Tax-Exempt Entity. The LLC shall not admit any additional members at any time. The LLC shall be governed by the Act, these Articles, and the Operating Agreement, of even date herewith.

ARTICLE IV
PURPOSE

The general purpose of this LLC shall be to operate exclusively for charitable, educational, scientific, or literary purposes, and in furtherance of such goals is authorized to do any and all activities which it is empowered to do under the Articles and this Operating Agreement, provided, however, that nothing herein shall be construed as allowing any activities which would jeopardize the LLC's derivative tax-exempt status or the tax-exempt status of the Member or would otherwise be inconsistent with the Member's classification as an organization described in §501(c)(3) of the Internal Revenue Code of 1986, as amended or replaced from time to time (the "**Code**") and its regulations as they now exist or may hereafter be amended, or as a corporation, contributions to which are deductible under §170(c)(2) of the Code. The specific purpose for which the LLC is formed is to establish, develop, maintain, improve, manage, and otherwise operate one or more public charter schools and associated uses.

ARTICLE V
INITIAL REGISTERED AGENT

The name and address of the initial registered agent of the Limited Liability Company is Stearns, Weaver, Miller, Weissler, Alhadeff & Sitterson, P.A., 106 E. College Avenue, Suite 700, Tallahassee, FL 32301, c/o Reggie Bouthillier, Esq.

ARTICLE VI
AMENDMENTS OR RESTATEMENTS

Any amendment or restatement of these Articles of Organization shall be in writing and shall not be effective unless and until approved in writing by the Member. No oral representations by the Member shall be deemed or construed to constitute any portion of, or otherwise affect the interpretation of, these Articles of Organization.

IN WITNESS WHEREOF, the undersigned has made and subscribed these Articles of Organization for the foregoing uses and purposes this 28th day of January 2020.

MEMBER
The Colen Family Charitable Trust

_____, Trustee

ACCEPTANCE BY REGISTERED AGENT

Having been named to accept service of process for the above stated limited liability company, at the place designated in the above Articles of Organization of Ina A. Colen Academy, LLC, I am familiar with and accept the appointment as registered agent and agree to act in this capacity.

Stearns, Weaver, Miller, Weissler, Alhadeff & Sitterson, P.A.

By: Reggie Bouthillier, Esq.

Date: 1.28.20

Attachment J: Governing Board Bylaws

OPERATING AGREEMENT AND BYLAWS OF INA A. COLEN ACADEMY, LLC

(A Florida Not-For-Profit Limited Liability Company)

This Operating Agreement and Bylaws (the "**Operating Agreement**") is made effective this 29th day of January, 2020, and entered into by and between The Colen Family Charitable Trust (the "**Member**"), and the Ina A. Colen Academy, LLC, a Florida not-for-profit Limited Liability Company (the "**L.L.C.**" or the "**Company**"). In consideration of the mutual covenants contained in this Agreement and other good and valuable consideration, the receipt and sufficiency of which are acknowledged by the parties, the parties agree as follows:

RECITALS

WHEREAS, the parties have formed, created, and established the Ina A. Colen Academy, LLC (the "**INA A. COLEN ACADEMY**" or the "**Academy**"), a not-for-profit Limited Liability Company pursuant to the provisions of the Florida Revised Limited Liability Company Act, for the purposes set forth in this Agreement; and

WHEREAS, the parties have elected to provide this Operating Agreement in order to have an appropriate corporate document and agreement to fulfill the purposes and functions hereof; and

WHEREAS, the Member executing this Operating Agreement constitutes the sole and authorized member of INA A. COLEN ACADEMY, as of the date of hereof; and

WHEREAS, the parties now wish to set forth the terms, conditions, rights, duties, and obligations of the Member and, as applicable, the Board of Managers (as defined herein) of INA A. COLEN ACADEMY.

NOW THEREFORE, in consideration of the covenants of each to the other, the undersigned as the authorized Member of INA A. COLEN ACADEMY agrees as follows:

ARTICLE I
MEMBERSHIP

1.1 Single Member: The L.L.C. shall have a single Member consisting of The Colen Family Charitable Trust (the "**Member**") which has a mission to create and support educational initiatives that result in societal benefit for people within the community. The Member is or has applied to be a Federal Tax- Exempt Entity as a private operating foundation. The L.L.C. shall not admit any additional members at any time.

ARTICLE II
FORMATION, TERM, AND PURPOSE

2.1 Formation: The Member hereby approves and ratifies the formation of the Florida Limited Liability Company under the Florida Revised Limited Liability Company Act (the "**Act**"), pursuant to Articles of Organization filed with the Florida Department of State Division of Corporations on January 28, 2020 (the "**Effective Date**"). Further, the membership interests of the Member shall be governed by Article 8 of the Uniform Commercial Code. This Agreement shall

(1) determine the rights, obligations, and liabilities of the Member and Board of Managers to the extent permitted by the Act and (2) govern the affairs of the L.L.C. and the conduct of its business.

2.2 Articles of Organization: A duly appointed representative has executed or shall immediately execute the Articles of Organization (the "**Articles**") and cause the Articles to be filed in the appropriate office. Thereafter, the Board of Managers shall execute and cause to be filed and otherwise published, such original or amended certificates evidencing the formation and operation of the L.L.C. whenever the same may be required under the laws of the State of Florida and of any other states where the Company shall determine to do business. If this Operating Agreement has been executed before the filing of the Articles of Organization, then the Company shall be considered to exist upon the moment of filing of the Articles of Organization.

2.3 Purpose of Company: The general purpose of this L.L.C. shall be to operate exclusively for charitable, educational, scientific, or literary purposes, and in furtherance of such goals is authorized to do any and all activities which it is empowered to do under the Articles and this Operating Agreement, provided, however, that nothing herein shall be construed as allowing any activities which would jeopardize the L.L.C.'s derivative tax-exempt status or the tax-exempt status of the Member or would otherwise be inconsistent with the Member's classification as an organization described in §501(c)(3) of the Internal Revenue Code of 1986, as amended or replaced from time to time (the "**Code**") and its regulations as they now exist or may hereafter be amended, or as a corporation, contributions to which are deductible under §170(c)(2) of the Code. The specific purpose for which the L.L.C. is formed is to establish, develop, maintain, improve, manage, and otherwise operate one or more public charter schools and associated uses.

2.4 Term: The Company shall commence and begin business upon the acceptance of the Articles of Organization by the Secretary of State of the State of Florida and shall continue in existence in perpetuity, unless sooner terminated, liquidated, or dissolved by law or as herein provided.

2.5 Tax Treatment: The Member hereby acknowledges its intention that the L.L.C. shall qualify for derivative exempt status as a disregarded entity of the Member solely for purposes of U.S. Federal and Florida income tax, but for all other purposes, the rights and liabilities of the Member, Board of Managers (as hereinafter defined), the Officers, and the L.L.C. shall be as set forth in the Act, except as otherwise provided herein. As required by the Internal Revenue Service ("**IRS**") for derivative exempt status as a disregarded entity, the Member shall have power to approve election of the members of the Board of Managers of the L.L.C. as described herein. As more fully described in Section 6.8 of this Agreement, the Board of Managers shall have the right of removal on the basis of a two-thirds majority of the Board of Managers. Any rights and privileges relating to appointment and removal shall, however, be subject to the requirements of the IRS as imposed from time to time to maintain the L.L.C.'s derivative exempt status.

2.6 Fiscal Year: The L.L.C.'s fiscal year shall commence on July 1 and shall terminate on the following June 30.

2.7 Non-discrimination: The L.L.C. shall not discriminate on the basis of disability, race, religion, national origin, ethnicity, sexual orientation, gender or age in either the hiring or

other employment practices of the Academy or in the Academy's admission policies for students. The L.L.C. shall conduct all of its activities in accordance with all applicable local, state, and federal anti-discrimination laws.

ARTICLE III
NAME AND PLACE OF BUSINESS

3.1 Name: The name of the L.L.C. shall be **Ina A. Colen Academy, LLC**. The business of the Company shall be conducted under this name and under any fictitious names or variations of this name that may be necessary to comply with the applicable laws and practices of other states within which the Company may do business or make investments.

3.2 Office of the L.L.C.: The principal place of business of the L.L.C. and the specified office of the L.L.C. where the records are required to be maintained by the L.L.C. under the Act, is 8435 SW 80th Street, Suite 2, Ocala, Florida 34481, or such other place or places as the Board of Managers shall deem advisable.

3.3 Registered Agent: The L.L.C.'s agent for service of process shall be Stearns Weaver Miller Weissler Alhadeff & Sitterson, P.A., c/o Reggie Bouthillier, Esq. or such other qualified person or entity as the Board of Managers may designate.

ARTICLE IV
BUSINESS AND POWERS OF THE LLC

4.1 Business: The purpose of the L.L.C. shall be to establish and operate one or more public charter school(s) and associated uses in Florida, and to engage in any lawful act or activity for which limited liability companies may be organized under the Act, as determined by the Member.

4.2 General Powers of the L.L.C.: This L.LC. shall have all the powers enumerated for corporations in the Florida Not-For-Profit Corporation Act, as it now exists and as is hereafter amended, and all such other powers as are permitted by applicable law and the Act, including, without limitation, and only by illustration, the following powers unless later restricted by applicable law or charter contract:

4.2.1 Succession: To have succession by its corporate name for the duration of its existence.

4.2.2 Lawsuits: To sue and be sued and appear and defend in all actions and proceedings in its corporate name to the same extent as a natural person.

4.2.3 Corporate Seal: To have a corporate seal, which may be altered at pleasure, and to use the same by causing it, or a facsimile thereof, to be impressed, affixed, or in any other manner reproduced.

4.2.4 Aquire Property: To purchase, take, receive, lease, take by gift, devise, or bequest, or otherwise acquire, own, hold, improve, use, and otherwise deal in and with real or personal property or any interest therein, wherever situated.

4.2.5 Dispose of Property: To sell, convey, mortgage, pledge, create security interests in, lease, exchange, transfer, and otherwise dispose of all or any part of its property and assets.

4.2.6 Loan and Invest: To lend money for its corporate purposes, invest and reinvest its funds, and take and hold real and personal property as security for the payment of funds so loaned or invested.

4.2.7 Donate: To make donations for the public welfare or for charitable, scientific, educational, or other similar purposes.

4.2.8 Miscellaneous: To have and exercise all powers necessary or convenient to effect its purpose.

ARTICLE V
DISTRIBUTIONS

5.1 Distributions: The L.L.C. shall not make any distributions to the Member, except as provided in Section 11, relating to the dissolution and winding up of the LLC. "**Distributions**" shall exclude any operating or capital expenses paid to the Member for value received, such as lease payments or operating fees for facilities and equipment, or services rendered, etc.

ARTICLE VI
BOARD OF MANAGERS

6.1 Purpose of the Board of Managers; Executive Director of Member:

6.1.1 Purpose of the Board of Managers: The L.L.C. will be governed by a volunteer governing board that will constitute the Board of Managers of the L.L.C. ("**Board of Managers**"). The Board of Managers will oversee the operations and powers of the L.L.C., have authority to hire and terminate a School Principal, hold meetings, and be responsible for all other aspects of the Academy as required by Florida's Charter School Statute (Fla. Stat. s. 1002.33, the "**Charter Statute**"). For avoidance of doubt, the duties and authority of the Board of Managers shall include all duties and authority of charter school governing boards set forth in the Charter Statute and other applicable laws.

6.1.2 Executive Director of Member: The Executive Director of the Member ("**Executive Director**") will attend the Board of Managers' meetings, acting as a liaison between the Member and the Board of Managers and serving as a resource to the Board of Managers in carrying out their duties and responsibilities. The Executive Director will be an employee of the Member and will not be a member of the Board of Managers. The assistance provided to the Board of Managers by the Executive Director will be at the sole cost of the Member.

6.2 Number, Appointment and Election of Board of Managers

6.2.1 Number of Board of Managers: The Board of Managers shall consist of at least five (5) but not more than seven (7) Managers, as determined by the Member from time to time.

6.2.2 Appointment of Initial Board of Managers. The Member shall have the sole right to appoint individuals to the initial Board of Managers. The Member shall appoint the initial Board of Managers with individuals who have a range of experiences and backgrounds conducive to operation of a successful public charter school, consistent with the L.L.C.'s mission and well representative of the charter school community served by the L.L.C.

6.2.3 Election of Board of Managers: After appointment of the initial Board of Managers by the Member, the Board of Managers shall elect new Managers to fill any Board of Managers vacancies from removal, resignation, death or expiration of term, subject to the approval of the Member, as provided in Section 6.13.2. Board of Managers shall be elected by the Board of Managers from a slate of candidates proposed by the Nominating Committee as described in Section 6.13.2. Newly elected members of the Board of Managers shall assume office at the first Board of Managers meeting following their election.

6.2.4 Requirements for Derivative Tax Exempt Status: Notwithstanding anything to the contrary herein, any Board of Managers' rights and privileges relating to appointment and election shall be subject to the requirements of the IRS as imposed from time to time and to maintain the L.L.C.'s derivative exempt status.

6.3 Power and Authority of the Board of Managers: Except as otherwise provided herein, the Board of Managers shall manage the L.L.C.'s business and affairs, and may exercise all of the rights, powers, and authorities of the L.L.C. under the Act, and do all such lawful acts and things that are not prohibited by statute, the Articles of Organization, or by this Operating Agreement.

6.4 Compensation: Members of the Board of Managers, shall not receive any compensation for their services as Board Managers. The Board may, by resolution under policies it may adopt, authorize reimbursement of expenses incurred in the performance of the Board Managers duties. Such authorization may prescribe conditions and procedures for approval and payment of such expenses.

6.5 Terms of Managers: The initial Board of Managers shall be divided into three (3) classes of approximately equal size, with the term of each Manager ending in each of the next three (3) consecutive years following July 1 of the first year of the Academy's operation so that the offices of approximately one-third of the total number of Managers become vacant each year. Thereafter, the term of a Manager shall be for three (3) years, unless the Manager is sooner removed by, or as a result of, the earliest to occur of: (1) operation of law; (2) an order or decree of any court of competent jurisdiction; (3) voluntary resignation, or (4) removal by the Member or two-thirds majority vote of the Board of Managers, as further described in Section 6.8. Additionally, an individual who has served a term as a Board Manager may not be eligible for

another term until one year has passed following the last day of the individual's preceding term as Manager.

6.6 Meetings of the Board of Managers:

6.6.1 Voting and Quorum: Each Manager shall have one vote on each matter coming before the Board of Managers. Except as otherwise provided in Section 6.6.6, below, any Manager not present at the meeting may vote on any matter by general or specific proxy directed to another Manager present or by specific instructions in writing. A quorum of the Board of Managers shall be required to conduct business, which shall consist of a majority of the Board of Managers. The following Board of Managers actions require a vote of two-thirds of the Board of Managers then in office and approval by the Member: Appointment of the Academy's School Principal; the approval of the Academy's budget; the selection and financing of the Academy facility; and the removal of a Manager by the Board of Managers. A majority vote of a "quorum" of the Board of Managers then in office shall be required to pass any other measure before the Board of Managers, with a "quorum" defined as a majority of the Board of Managers then in office. Any less of a number may (1) set a time to adjourn, (2) adjourn, (3) recess, or (4) take measures to obtain a quorum.

6.6.2 Meeting Place and Electronic Participation: Meetings of the Board of Managers shall be called at places within or outside of the State of Florida, and at times fixed by resolution of the Board, or upon call of a majority of Managers. Except as otherwise provided in Section 6.6.6, below, Managers of the Board of Managers may participate in a meeting of the Board by, and the Board may conduct meetings through use of, any means of communication whereby all persons participating in the meeting shall constitute presence in person at the meeting. A written record shall be made of any action taken at a meeting conducted by such means of communication.

6.6.3 Notice: The Secretary or a Manager performing the Secretary's duties shall send notice by mail, email, facsimile, or other acceptable mode of transmittal to each member of the Board of Managers, the Principal, if any, and the Executive Director (on behalf of the Member), at his or her last recorded address at least (10) days in advance of regular meetings, or five (5) days in advance of special meetings, provided that such individual notice need not be given for regular meetings held at times and places fixed by resolution of the Board. Emergency meetings may be held with notice that is reasonable under the circumstances. Notice of meetings of the Board of Managers need not state the purpose of the meeting.

6.6.4 Attendance: Any member of the Board of Managers unable to attend a meeting of the Board shall notify the Secretary and state the reason for his or her absence. Except as otherwise provided in Section 6.6.6, below, a Manager may assign, by written proxy pursuant to Section 6.5.1, another Manager to substitute for him or her at meetings. If a member of the Board is absent from two (2) meetings in a fiscal year, he or she may be removed by a two-thirds vote of the Managers.

6.6.5 Written Consent in Lieu of Meeting: Except as otherwise provided in Section 6.6.6, any action that may be taken at a meeting of the Board of Managers may be taken without a meeting if a written consent setting forth the actions to be taken, signed either before or after the action, by all of the Managers is delivered to the Secretary or other Manager performing these duties for inclusion in the L.L.C.'s records. These actions shall be effective when the last Manager signs the consent, unless the consent specifies a different effective date, in which case the action taken shall be effective on the date specified therein, provided the consent states the date of execution by each Manager. Any such consent shall have the same force and effect as a unanimous vote of the Managers.

6.6.6 The Florida Sunshine Act: In the event that the L.L.C. enters into any charter contract for operation of a public charter school, to the extent required by such laws, rules, and regulations as govern the operation of such public charter school, all meetings of the Board of Managers will be noticed, minutes taken, public comment heard and otherwise conducted in accordance with the Sunshine Act (Section 286.011, Florida Statutes). In such event, notices to the public of such meetings will be provided in accordance with the Sunshine Act and Charter Statute, and proxy voting, voting by Power of Attorney and written consent in lieu of holding a meeting will not be permitted. In addition, if members of the Board of Managers cannot attend a meeting in person, they may only be considered present and participate in meetings by means of communication media technology in accordance with rules adopted by the Florida Administration Commission pursuant to Section 120.54(5), Florida Statutes.

6.6.7 Attendance by School Principal and Parent Representative: So long as any Academy charter contract(s) remains in effect, the Board of Managers must appoint a Parent Representative to facilitate parental involvement and resolve disputes for each charter school as required by the Charter Statute. As defined in the Charter Statute, the Parent Representative must reside in the county in which the charter school is located. The Parent Representative is not required to be a parent and may be a member of the Board of Managers, charter school employee or individual contracted to represent the Board of Managers. If the Board of Managers oversees more than one (1) charter school in the school district then a separate Parent Representative must be appointed for each charter school. After the effective date of the Academy's charter contract(s), the Parent Representative and School Principal, or his or her designee(s), must attend meetings of the Company in person.

6.6.8 Annual Meeting: No later than June 30th each year, the Board of Managers shall hold its Annual Meeting to, at a minimum, elect Officers for the next fiscal year, fill any vacancies on the Board of Managers and adopt an annual budget.

6.7 Presumption of Assent: A Manager who is present at a meeting of the Board of Managers when L.L.C. action is taken is deemed to have assented to the action taken unless (1) the Manager objects at the beginning of the meeting or (2) the Manager votes against, or abstains from, the action taken. The Secretary or any other officer performing the Secretary's duties shall maintain accurate records of all votes of the Board of Managers.

6.8 Resignation and Removal: Any Manager may resign at any time by giving written notice to the Secretary, or to the Board of Managers. Such resignation shall take effect at the time of acceptance thereof as determined by the Board. Any Manager may be removed by the Member for cause as provided herein. The Member has authority to remove a Manager for cause if, in the reasonable judgement of the Member, a Manager (i) engages in fraud, embezzlement, or theft or willful misconduct damaging to the Academy, its reputation, services, or students; (ii) violates any law or regulation relating to the Academy; (iii) engages in any intentional damage to Company's assets; (iv) engages in any unauthorized disclosure of any trade secret or confidential information of the Academy, Member or its students; (v) continually fails to perform duties owed to the Academy; (vi) is charged with a felony or a misdemeanor involving moral turpitude or act in any manner that would result in loss of background screening required by law for charter school board members; (vii) acts in a manner that is contrary to the derivative tax exempt status of the L.L.C. or the tax exempt status of the Member; (viii) acts inconsistently with the missions of the Academy or the Member; or (ix) fails to comply with the Summary of Board of Manager Duties and Responsibilities.

The Board may also vote for the removal of a Manager by a two-thirds majority of the Managers then in office, subject to the approval of the Member. Notwithstanding anything to the contrary herein, any Board of Managers' rights and privileges relating to removal shall be subject to the requirements of the IRS as imposed from time to time to maintain the L.L.C.'s derivative exempt status.

6.9 Vacancies Prior to Expiration of Term: If a vacancy should occur in the Board of Managers prior to expiration of a term due to resignation, removal or death, the Board of Managers shall elect an individual to serve on the Board for the remainder of the vacating Manager's three-year term consistent with Sections 6.2.3 and 6.13.2.

6.10 Third-Party Reliance: Third parties dealing with the L.L.C. shall be entitled to rely conclusively upon the power and authority of the Managers as set forth herein, subject only to the express limitations set forth in this Operating Agreement or by law.

6.11 No Duty to Consult: Except as otherwise provided herein, the Managers shall have no duty or obligation to consult with or seek the advice of the Member in connection with the conduct of the business of the L.L.C.

6.12 Initial Board of Managers: The initial Board of Managers shall be:

Robert Colen
Dr. Harvey Taub
Kay Fleishaker
Dr. Mery Lossada
Janet Behnke

6.13 Committees:

6.13.1 Establishment; Membership; Terms: The Board of Managers may establish and appoint members to such standing committees and/or ad hoc committees as it thinks necessary for the effective governing of the L.L.C. The permitted activities and scope of

each such committee shall be established by the Board of Managers at the inception of each such committee and may be amended by the Board of Managers from time to time. A Committee may be made up of members of the Board of Managers and non-Board members. Committee member terms shall be established upon appointment and shall be one year or less. Committee terms may be renewed. The Board of Managers shall appoint a chair for each committee unless otherwise provided in this Operating Agreement.

6.13.2 Nominating Committee: The Board of Managers shall appoint a Nominating Committee to recommend candidates to fill any vacancies on the Board of Managers. The Nominating Committee will be considered a standing committee. Prior to making candidate recommendations to the Board of Directors, the Nominating Committee will provide a list of potential candidates and their respective background and biographical information to the Member for its review and approval. The Member may also provide candidate names to the Nominating Committee, along with their respective background and biographical information. The Nominating Committee will not recommend any candidate for the Board of Directors who has not been approved or provided by the Member. As part of the nominating process, the Nominating Committee will also provide information to all potential candidates regarding the roles and responsibilities of charter school governing board members as well as the Conflict of Interest Policy for the L.L.C.

6.13.3 Finance Committee: The Board of Managers shall appoint a Finance Committee which will be chaired by the Treasurer. The Finance Committee will be considered a standing committee. It will work with the Principal to prepare a draft annual budget for consideration and approval by the Board of Managers and will perform such other duties as identified by the Board of Managers. The Member shall receive specific notice of all meetings of the Finance Committee.

6.13.4 Audit Committee: The Board of Managers shall appoint an Audit Committee in accordance with Section 218.391, Florida Statutes. The Audit Committee will be considered a standing committee. It will follow the procedures and requirements set forth in Section 218.391, Florida Statutes, and any other applicable laws and rules, relating to recommendation and selection of an auditor to conduct the independent financial audits required by the Charter Statute.

6.13.5 Open Meetings: So long as the Academy's contract for operation of a public charter school remains in effect, any standing or ad hoc committees subject to the Sunshine Act will be noticed, minutes taken, public comment received and otherwise conducted in accordance with such Act.

ARTICLE VII
OFFICERS

7.1 Election and Removal: The Board of Managers shall elect individuals to serve as Officers, with certain powers, authorities, and responsibilites for the management of the L.L.C.'s business delegated to them pursuant this Article 7.

- The Officers shall directly report to the Board of Managers.
- The Officers shall include a President, a Secretary, and a Treasurer and may include one or more Vice Presidents.
- Any Officer may hold two or more offices.
- All Officers shall be elected from among the Board of Managers.
- The Officers of the L.L.C. shall have such authority to perform and shall perform such duties with respect to the management of the L.L.C. as are provided in this Operating Agreement or as may be determined by the Board of Managers.
- The selection of an Officer shall not of itself create any contract rights in favor of the Officer.
- Each Officer term shall be one year, corresponding with the L.L.C.'s fiscal year, with the ability to be elected for subsequent terms as an Officer.
- Any Officer of the L.L.C. may be removed summarily from his or her Officer position, with or without cause, at any time, by a majority vote of the Board of Managers.

7.2 Duties of Officers: The Officers will devote such time, effort, and skill in the management of the L.L.C.'s business affairs as each deems necessary and proper for the L.L.C.'s welfare and success. Exept as otherwise provided herein, the duties of each of the Officers may be performed by staff members of the Academy under the supervision of each Officer.

7.3 Duties of the President: The President shall be the Chairman of the Board of Managers. The President shall preside at all meetings of the Board of Managers and shall prepare the agendas for such meetings, in consultation with the Executive Director and School Principal, if hired. At each annual meeting of the Board of Managers, the President or the President's designee shall report on the activities of the L.L.C. The President may sign and execute in the name of the L.L.C.: deeds; mortgages; bonds; contracts; or other instruments except in cases where the signing and execution thereof shall be expressly delegated by the Board of Managers or this Agreement to some other Officer or agent of the L.L.C., or as otherwise required by law. The President shall perform these and such other duties as the Board of Managers, with the consent of the Member, may from time to time prescribe, and as are incident to the office of President.

7.4 Duties of the Vice President: Each Vice President, if any, shall have such powers and duties as may from time to time be assigned by the Board of Managers. Any Vice President may, when authorized by the Board of Managers, sign and execute in the name of the L.L.C.: deeds; mortgages; bonds; contracts; or other instrument, except for the signing and execute of such documents as shall be expressly delegated by the Board of Managers or President to some other Officer or agent of the L.L.C., or as otherwise required by law.

7.5 Duties of the Treasurer: The Treasurer shall have charge of and be responsible for all funds, securities, receipts, and disbursements of the L.L.C., and shall deposit or cause to be deposited all monies and securities of the L.L.C. in such banks and depositories as shall be designated by the Board of Managers. The Treasurer shall be responsible for (1) maintaining adequate financial accounts and records in accordance with generally accepted accounting practices; (2) the preparation of appropriate operating budgets and financial statements; (3) the preparation and filing of all tax returns that are required by law; and (4) the performance of all duties incident to the office of Treasurer and such other duties as from time to time may be assigned

to the Treasurer by the Board of Managers or the President. The Treasurer may sign and execute in the name of the L.L.C.: deeds; mortgages; bonds; contracts; or other instruments, except in cases where the signing and execution thereof shall be expressly delegated by the Board of Managers or by this Agreement to some other officer or agent of the L.L.C., or as otherwise required by law.

7.6 Duties of the Secretary: The Secretary shall act as secretary of all meetings of the Board of Managers of the L.L.C and keep or cause to be kept minutes of the meetings, with the assistance of the Executive Director. The Secretary shall ensure that the minutes of all meetings are kept and preserved. The Secretary shall ensure that all notices which are required to be given by the L.L.C. are duly given and served; shall have custody of all deeds, leases, contracts, and other important L.L.C. documents; shall have charge of the books, records, and papers of the L.L.C. relating to its organization and management as a limited liability company; shall see that all reports, statements, and other documents required by law (except tax returns) are properly filed; and shall in general, perform all the duties incident to the office of the Secretary and such other duties as from time to time may be assigned to the Secretary by the Board of Managers or the President.

7.7 Compensation: Officers shall not receive any compensation for their services.

ARTICLE VIII
LIMITATION OF LIABILITY; INDEMNIFICATION

8.1 Limitation of Liability of the Member: Except as otherwise prohibited for an organization exempt from taxation under I.R.C. §501 (c)(3), or otherwise provided by the Articles of Organization, this Operating Agreement, or the laws of Florida, the Member shall have no liability, merely as a member, for any liabilities or losses of the L.L.C. beyond the Member's contributions.

8.2 Limitation of Liability of Managers and Officers: Except as prohibited by the laws of Florida, the liability of the Managers and the Officers to the L.L.C., to the Member, or to third parties shall be limited to the fullest extent permitted for an L.L.C. under the Act, and for an organization exempt from taxation under I.R.C. §501(c)(3).

8.3 Indemnification: The L.L.C. shall indemnify the Member, Officers, and the Managers for all costs, losses, liabilities, and damages paid or accrued by the Member, Officers, or Managers in connection with the business of the L.L.C. or because such person is a Member, Officer, or Manager, to the fullest extent permitted for an organization exempt from taxation under I.R.C. §501(c)(3). In addition, the Managers shall cause the L.L.C. to advance to such persons the costs of participation in any judicial or administrative trial, hearing, or other proceeding, whether civil or criminal, or investigative. The Managers may, with the consent of the Member, indemnify all other employees and agents of the L.L.C. for all costs, losses, liabilities, and damages paid or accrued by the agent or employee in connection with the business of the L.L.C., or because such person is an agent or employee, to the fullest extent provided for or allowed under the Act and to the fullest extent permitted for an organization exempt from taxation under I.R.C. §501 (c)(3). The

L.L.C. shall obtain liability and other forms of insurance considered to be necessary and prudent to provide the indemnification section forth in this Operating Agreement.

8.4 Defects as to Formalities: A failure to observe any formalities or requirements of this Operating Agreement, the Articles of Organization, or the Act shall not be grounds for vitiating any contract or transaction of the L.L.C., or imposing personal liability on the Member, Officers, or any Managers for the liability of the L.L.C.

ARTICLE IX
BOOKS, RECORDS
ACCOUNTING, REPORTS, AND TAX MATTERS

9.1 Books and Records: The Managers or Officers shall keep or cause to be kept, complete and accurate books of account, in which shall be entered fully and accurately each and every transaction of the L.L.C., and the records required to be maintained by the L.L.C. pursuant to the Act. The L.L.C.'s books and records shall be maintained at the principal office of the L.L.C., or at such other place as the L.L.C. may from time to time designate. The Member, including its Executive Director, shall at all reasonable times have access to and the right to inspect and copy the books and records through a person designated by the Member. The Member, including its Executive Director, shall also be provided a copy of all financial and academic performance reports provided to the Board of Managers.

9.2 Tax Information: The L.L.C. shall deliver to the Member as soon as possible after the end of each taxable year, the information relating to the L.L.C. that is necessary for the preparation of the Member's Form 990 and any other tax filings the Member is required to make. As governed by Florida Statute §605.1103, for tax purposes, the L.L.C. is not considered a separate legal entity from the Member, but for contractual purposes, it will be considered a separate legal entity from the Member.

9.3 Tax Exemption: The L.L.C. shall be tax exempt, deriving its tax-exempt status from its Member.

9.4 Method of Accounting: The records of the L.L.C. shall be maintained in the method of accounting required for Florida charter schools.

ARTICLE X
AMENDMENTS

This Operating Agreement may be amended from time to time only by a written instrument adopted and executed by the Member and the L.L.C.

ARTICLE XI
DISSOLUTION AND WINDING UP

11.1 Manner of Dissolution: The L.L.C. shall be dissolved and its affairs wound up only with the consent of the Member and in accordance with the procedures set forth in the Act.

11.2 Effect of Dissolution: Upon dissolution, the L.L.C. shall cease carrying on the L.L.C. business (as distinguished from the winding up of the L.L.C. business), but the L.L.C. shall not be terminated by the articles of dissolution alone, and shall continue until the winding up of the affairs of the L.L.C. is completed.

11.3 Distribution of Assets on Dissolution: Upon the winding up of the L.L.C., the L.L.C. property shall be distributed in accordance with the laws of the State of Florida pertaining to public charter schools, with any remainder to the Member to be utilized and/or distributed in accordance with the Code.

ARTICLE XII
MISCELLANEOUS PROVISIONS

12.1 Entire Agreement: This Operating Agreement represents the entire agreement between the Member and the L.L.C.

12.2 Governing Law: This Operating Agreement shall be construed and enforced in accordance with the laws of Florida and the Act.

12.3 Rights of Creditors and Third Parties Under Agreement: This Operating Agreement is entered into between the L.L.C. and the Member for the exclusive benefit of the L.L.C., its Member, and their successors and assignees. This Operating Agreement is expressly not intended for the benefit of any creditor of the L.L.C. or any other person. Except and only to the extent provided by applicable statute, no such creditor or third party shall have any rights under this Operating Agreement.

ARTICLE XII
PROHIBITED ACTIVITIES

Notwithstanding any other provision of these articles, the L.L.C. shall not carry on any activities not permitted to be carried on (a) by a Company exempt from federal income tax under §501 (c)(3) of the Internl Revenue Code, or the corresponding section of any future federal tax code, or (b) by a company, contributions to which are deductibe under §170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

[Execution page follows.]

The undersiged has signed his/her name below effective as of the Effective Date.

MEMBER:

THE COLEN FAMILY CHARITABLE TRUST

_____ as Tee
_____, Trustee

Date: January 29, 2020

Attachment K: Governing Board Code of Ethics and Conflict of Interest Policy

CONFLICT OF INTEREST AND ANTI-NEPOTISM POLICY OF THE GOVERNING BOARD OF INA A. COLEN ACADEMY, LLC

Adopted and Effective: _____, 2020

Article 1
Purpose

The purpose of the following Conflict of Interest and Anti-Nepotism Policy of Ina A. Colen Academy, LLC (the "Organization" or "Charter School") is to protect this tax-exempt Organization's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or Governing Board member of the Organization or might result in a possible excess benefit transaction. This Policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations. It is also intended to serve as a guide for the Organization's Governing Board with respect to conflicts of interest and voting pursuant to Florida laws pertaining to charter school governing boards.

Article 2
Definitions

2.1 Interested Person. An "Interested Person" is any person serving as a member of the Governing Board of this Organization who, as of the date of discussion or action by the Board, either: (i) has a direct or indirect Financial Interest, as defined in Section 2.2 below; (ii) intends, or understands it to be more probable than not, that he or she will acquire such a direct or indirect Financial Interest at any time during the pendency of the proposed transaction or arrangement; (iii) has an Other Interest that qualifies as a Conflict of Interest, as defined in Section 2.6 or Article 6, below.

2.2 Financial Interest. A "Financial Interest" is an interest, whether through business, investment, or Relative, which can be described as one or more of the following:

- 2.2.1 An ownership or investment interest in any entity with which the Organization has a transaction or arrangement; or
- 2.2.2 A Compensation Arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement; or
- 2.2.3 A potential ownership or investment interest in, or Compensation Arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement.

A Financial Interest need not be held as of the date of discussion or action by the Board; rather, it is sufficient, for purposes of this Policy, if, as of the date of discussion or action by the Board, the Interested Person intends, or understands it to be more probable than not, that he or

she will acquire a Financial Interest at any time during the pendency of the proposed transaction or arrangement that is the subject of discussion or action by the Board.

2.3 Other Interest. An "Other Interest," for purposes of this Policy, is any circumstance in which an Interested Person may be influenced, or may appear to be influenced, either in whole or in part by any purpose or motive other than the success and well-being of the Organization as a whole and the achievement of its tax exempt purposes. An example of such an "Other Interest" would include, without limitation of the foregoing, if an Interested Person is a parent or grandparent of a student impacted by a decision by the Board, and the Interested Person does not believe that he/she could vote or participate in a discussion by the Board giving precedence of the well-being of the Organization as a whole over his/her personal interests or the interests of his/her child or grandchild. An "Other Interest" may also be an interest set forth in Article 6, below, that does not otherwise constitute a Financial Interest.

2.4 Relative. For purposes of this Policy, unless otherwise provided herein, and pursuant to Section 112.3143, Florida Statutes, "Relative" means any father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, or daughter-in-law.

2.5 Compensation Arrangement. A "Compensation Arrangement" is any agreement or understanding pursuant to which a person may or shall receive either directly or indirectly, money or property from another person or organization, irrespective of whether such money or property is paid in consideration for the performance of services or the provision of other value.

2.6 Conflict of Interest. With respect to a matter for discussion or action by the Board, any circumstance under which an Interested Person, by virtue of a Financial Interest or Other Interest, may be influenced, or may appear to be influenced, either in whole or in part by any purpose or motive other than the success and well-being of the Organization and the achievement of its tax exempt purposes.

Article 3
Disclosure of Financial or Other Interest and Determination of Conflict

3.1 Disclosure of Financial or Other Interest. If, at any time, an Interested Person becomes aware that the Board may or shall discuss or act upon any transaction or arrangement which may have any bearing of any kind upon, or may relate in any manner to, a Financial or Other Interest of the Interested Person, such Interested Person shall disclose such Financial or Other Interest to the Board and the Board's legal counsel as follows:

3.1.1 The Interested Person shall provide to the Board and the Board's legal counsel, in advance of such discussion or action by the Board, written (electronic or hard copy) disclosure of the existence, nature and extent of the Interested Person's Financial or Other Interest, or

3.1.2 The Interested Person shall verbally inform the Board and the Board's legal counsel of the existence, nature and extent of the Interested Person's Financial or Other Interest during the Board meeting in advance of such discussion or action by the Board.

Any and all written or verbal disclosures of Financial or Other Interests shall be made a formal part of the minutes of the Board. In the event that an Interested Person provides written disclosure of such Interested Person's Financial or Other Interest, no member of the Board may respond to such disclosure, either in writing or orally, except in a meeting that meets the requirements of Florida's Sunshine Law.

3.2 Recusal by Interested Person, if Legally Permissible. In connection with an Interested Person's disclosure of a Financial or Other Interest pursuant to Section 3.1, the Interested Person may voluntarily recuse himself or herself from discussion and action by the Board, at such time and in such form as is used by the Interested Person to disclose such Financial or Other Interest pursuant to Section 3.1, above. Such recusal would only be permissible if recusal is a permissible action pursuant to Florida law with respect to the particular Financial or Other Interest of the Interested Person.

3.3 Determination of Conflict of Interest. Where an Interested Person has provided advance written disclosure of a Financial or Other Interest but has not voluntarily recused himself or herself from discussion of or action upon the proposed transaction or arrangement, the Board shall, prior to commencing its discussion or taking action, determine whether the Financial or Other Interest creates a Conflict of Interest, as defined above and as prohibited by law. The Interested Person shall not participate in any discussions or vote related to this determination except to the extent necessary to fully explain the Financial or Other Interest and the manner in which the proposed transaction or arrangement to be discussed or acted upon by the Board may or will bear upon or relate to the Financial or Other Interest.

3.4 Exceptions. Pursuant to Section 112.313(12), Florida Statutes, the Board may consider the following exceptions based on constituting a *de minimus* conflict of interest:

3.4.1 The transaction or arrangement is awarded under a system of sealed, competitive bidding to the lowest or best bidder and: (a) The Board member or the Board member's spouse or child has in no way participated in the determination of the bid specifications or the determination of the lowest or best bidder; (b) The Board member or the Board member's spouse or child has in no way used or attempted to use the Board member's influence to persuade the agency or any personnel thereof to enter such a contract other than by the mere submission of the bid; and (c) The Board member, prior to or at the time of the submission of the bid, has filed a statement with the Commission on Ethics, disclosing the Board member's interest, or the interest of the Board member's spouse or child, and the nature of the intended transaction or arrangement.

3.4.2 The purchase or sale is for legal advertising in a newspaper, for any utilities service, or for passage on a common carrier.

3.4.3 The business entity involved is the only source of supply and there is full disclosure by the Board member of his or her interest in the business entity to the Governing Board prior to the purchase, rental, sale, leasing, or other business being transacted.

3.4.4 The total amount of the transactions in the aggregate between the business entity and the Organization does not exceed $500 per calendar year.

3.4.5 The fact that a Board member is a stockholder, officer, or director of a bank will not bar such bank from qualifying as a depository of funds, provided it appears in the records of the Organization that the Governing Board has determined that such Board member has not favored such bank over other qualified banks.

3.4.6 The Board member purchases in a private capacity goods or services, at a price and upon terms available to similarly situated members of the general public, from a business entity which is doing business with the Organization.

Article 4
Procedures Upon Determination of Conflict of Interest

4.1 Exclusion from Discussion and Vote. In circumstances where the Board has determined that a Conflict of Interest exists or the Interested Person has voluntarily recused him/herself, the Interested Person shall not participate in any discussion or vote regarding the transaction or arrangement at issue. While all meetings of the Board are open public meetings, the Interested person may choose not to be present in the meeting room for the discussion or vote relating to the transaction or arrangement.

4.2 Removal from Board. Under some circumstances, Florida law does not allow a governing board member to be excluded from a vote in order to cure a Conflict of Interest. In such a Conflict of Interest exists, the Interested Person will be required to resign or will be removed from the Board.

4.3 Action by Board. With respect to any transaction or arrangement with regard to which the Board has determined that a Conflict of Interest exists, the Board shall discuss such transaction or arrangement as appropriate, but shall not formally approve such transaction or arrangement unless and until the non-interested members of the Board have decided, by majority vote, that the transaction or arrangement is in the best interests of, and for the benefit of, the Organization, and is fair and reasonable thereto in all respects. In complying with this Section 4.2, the Board shall recognize that, under certain circumstances, a decision made pursuant to this Section may necessitate an investigation of alternatives to the proposed transaction or arrangement, and/or a determination as to whether a more advantageous transaction or arrangement might be obtained with reasonable efforts under the circumstances.

Article 5
Documentation of Disclosure and Procedures

5.1 Meeting Minutes. Minutes of meetings of the Board shall include copies of all written disclosures of Financial and Other Interests and shall describe all verbal disclosures

thereof. Such minutes shall further reflect the determination of the Board as to whether a Conflict of Interest exists, and the objection of the Interested Person, if any, to such determination. Where a Conflict of Interest has been determined to exist, the minutes should reflect the Board's compliance with the procedures described in Sections 4.1 and 4.2, above. With respect to any transaction or arrangement with regard to which a Conflict of Interest has been determined to exist, meeting minutes shall describe the substance of the discussions relating to the transaction or arrangement, and who was present for such discussions. In addition, minutes should identify the members who were present for any and all votes upon such transaction or arrangement, along with a record of the final vote.

Article 6
Other Prohibited Conflicts of Interest

6.1 Prohibition on Solicitation or Acceptance of Gifts. Pursuant to Section 112.313(2), Florida Statutes, no member of the Board shall solicit or accept anything of value to the Board member, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the vote, official action, or judgment of the Board member would be influenced thereby.

6.2 Prohibition on Doing Business with the Organization. Pursuant to Section 112.313(3), Florida Statutes, no Board member acting in his or her official capacity, shall either directly or indirectly purchase, rent, or lease any realty, goods, or services for the Organization any business entity of which the Board member or the Board member's spouse or child is an officer, partner, director, or proprietor or in which such Board member or the Board member's spouse or child, or any combination of them, has a material interest. Nor shall a Board member, acting in a private capacity, rent, lease, or sell any realty, goods, or services to the Organization. This subsection shall not affect or be construed to prohibit contracts entered into prior to the Board member's election to the Board.

6.3 Conflicting Employment or Contractual Relationship. Pursuant to Section 112.313(7), Florida Statutes, no Board member shall have or hold any employment or contractual relationship with any business entity or any agency is doing business with the Organization; nor shall a Board member have or hold any employment or contractual relationship that will create a continuing or frequently recurring conflict between his or her private interests and the performance of his or her duties as a Board member or that would impede the full and faithful discharge of his or her duties as a Board member.

6.4 Voting Where there is a Conflict of Interest. Pursuant to Section 112.3143, Florida Statutes, no Board member shall vote in an official capacity upon any measure which would inure to his or her special private gain or loss; which he or she knows would inure to the special private gain or loss of any principal by whom he or she is retained or to the parent organization or subsidiary of a corporate principal by which he or she is retained; or which he or she knows would inure to the special private gain or loss of a Relative or business associate of the Board member.

6.5 Prohibition of Certain Individuals Serving as Governing Board Members. Pursuant to Section 1002.33(26)(c), Florida Statutes, an employee of the charter school overseen by this Organization, or his or her spouse, or an employee of a charter management organization, or his or her spouse, shall not be a member of the governing board of this Organization.

Article 7
Restriction on Employment of Relatives, Pursuant to Section 1002.33(24), Florida Statutes

7.1 For purposes of this Article 7, "Charter school personnel" means a charter school owner, president, chairperson of the Board of directors, superintendent, Board member, principal, assistant principal, or any other person employed by the charter school who has equivalent decision making authority and in whom is vested the authority, or to whom the authority has been delegated, to appoint, employ, promote, or advance individuals or to recommend individuals for appointment, employment, promotion, or advancement in connection with employment in a charter school, including the authority as a member of a governing body of a charter school to vote on the appointment, employment, promotion, or advancement of individuals.

7.2 For purposes of this Article 7, "Relative" means father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, brother-in-law, sister-in-law, stepfather, stepmother, stepson, stepdaughter, stepbrother, stepsister, half brother, or half sister.

7.3 Charter school personnel may not appoint, employ, promote, or advance, or advocate for appointment, employment, promotion, or advancement, in or to a position in the charter school in which the personnel are serving or over which the personnel exercises jurisdiction or control any individual who is a relative. An individual may not be appointed, employed, promoted, or advanced in or to a position in a charter school if such appointment, employment, promotion, or advancement has been advocated by charter school personnel who serve in or exercise jurisdiction or control over the charter school and who is a relative of the individual or if such appointment, employment, promotion, or advancement is made by the governing board of which a relative of the individual is a member.

7.4 The approval of budgets does not constitute "jurisdiction or control" for the purposes of this subsection.

Article 8
Disclosure of Identity of Relatives Employed by, or Assigned to Work at, Charter School

8.1 On an annual basis, and in accordance with Section 1002.33(7)(a)18., Florida Statutes, the Charter School shall disclose to its sponsoring school district the identity of all relatives employed by, or assigned to work at, the charter school who are relatives of a member of the governing board of directors, superintendent, principal, assistant principal

or any other person employed by, or assigned to work at, the Charter School. For purposes of this Article 8, the term "relative" has the same meaning as set forth in Article 7.2, above.

Article 9
Employment of Relatives

9.1 In the event that relatives, as defined above, are employed by, or assigned to work at, the Charter School, these procedures shall be followed to ensure compliance with Florida law and charter contract requirements.

9.2 Documentation shall be maintained in the employees' files to verify that no relative advocated for the employment or advancement of such employee. In addition, such documentation shall include the non-related individual(s) responsible for direct supervision, evaluation and other employment decisions regarding the employees. Such documentation shall be presented as an information item to the Charter School governing board.

Article 10
Training and Background Screening Requirements

10.1 Governance Training

10.1.1 Pursuant to Section 1002.33(9)(j), Florida Statutes, each director of the governing board shall participate in governance training approved by the Florida Department of Education no later than 90 days of final appointment to the governing board.

10.1.2 Required governance training consists of a minimum of four (4) hours of instruction focusing on government in the sunshine, conflicts of interest, ethics, and financial responsibility.

10.1.3 After the initial four (4) hour training, each director of the governing board is required, within the subsequent three (3) years as a governing board member, and for each three (3) year period thereafter, to complete a two (2) hour refresher training on the four (4) topics above in order to retain his or her position on the board. Any director who fails to obtain the two (2) hour refresher training within any three (3) year period must take the four (4) hours of instruction again in order to regain eligibility as a director.

10.2 Pursuant to Section 1002.33(12)(g), Florida Statutes, each director of the governing board shall undergo fingerprinting and background screening no later than thirty (30) days following final appointment to the governing board. Fingerprinting and background screening shall be updated periodically as required by law. Until such time as required fingerprinting and background screening is completed and cleared for each director, no such director shall be permitted on campus while students are present without an escort of charter school staff.

Article 11
Initial and Annual Written Assent

11.1 Each director, principal officer and member of a committee with governing board delegated powers shall, upon initial appointment and annually, sign a statement, in substantially the same form as attached as Exhibit A to this Policy, which affirms such person:

11.1.1 Has received a copy of the conflicts of interest policy;

11.1.2 Has read and understands the policy;

11.1.3 Has agreed to comply with the policy;

11.1.4 Understands the Organization is charitable and in order to maintain its federal tax exemption, it must engage primarily in activities which accomplish one or more of its tax-exempt purposes; and

11.1.5 If a charter school governing board member, is current in background checks and governing board training as required by Florida law for charter school governing board members.

11.1.6. Said form shall be updated from time to time to reflect changes in law and best practices for charter school governing boards.

Article 12
Periodic Reviews

12.1 To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

12.1.1. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and are the result of arm's length bargaining.

12.1.2 Whether transactions or arrangements entered into by the Organization conform to the Organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in personal inurement, impermissible private benefit or in an excess benefit transaction.

Article 13
Use of Outside Experts

When conducting the periodic reviews as provided for in Article 12, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the Board of its responsibility for ensuring periodic reviews are conducted.

Board Secretary Certificate

I hereby certify that the foregoing Conflict of Interest and Anti-Nepotism Policy for Ina A. Colen Academy, LLC, was adopted by a majority vote of a quorum of the Governing Board of Directors at a duly noticed meeting held on _____, 2019.

_____
Board Secretary

_____
Printed Name

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EXHIBIT A
WRITTEN AFFIRMATION BY GOVERNING BOARD OR COMMITTEE MEMBER
INA C. COLEN ACADEMY, LLC

This written affirmation is provided in accordance with the Conflict of Interest Policy of Ina A. Colen Academy, LLC, ("Organization") adopted and effective as of _____, 2019 ("Policy"). In accordance with the Policy, by my signature below, I hereby affirm the following:

1. I have received a copy of the Policy.

2. I have read and understand the Policy.

3. I agree to comply with the Policy, and I am currently in compliance.

4. I understand the Organization is charitable, and in order to maintain its federal tax exemption, it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

5. If I am a charter school governing board member, I am current in background checks and governing board training as required by Florida law for charter school governing board members.

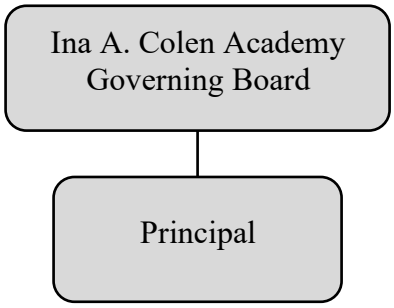
_____
Printed Name: _____
Title and Office: _____
Date: _____

DRAFT

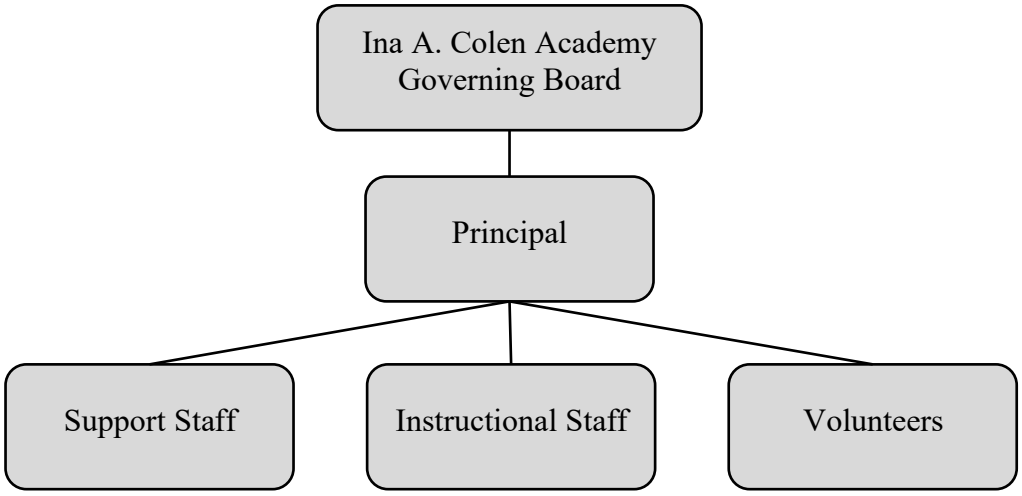
Attachment M: Organization Charts

Attachment M: Organizational Charts

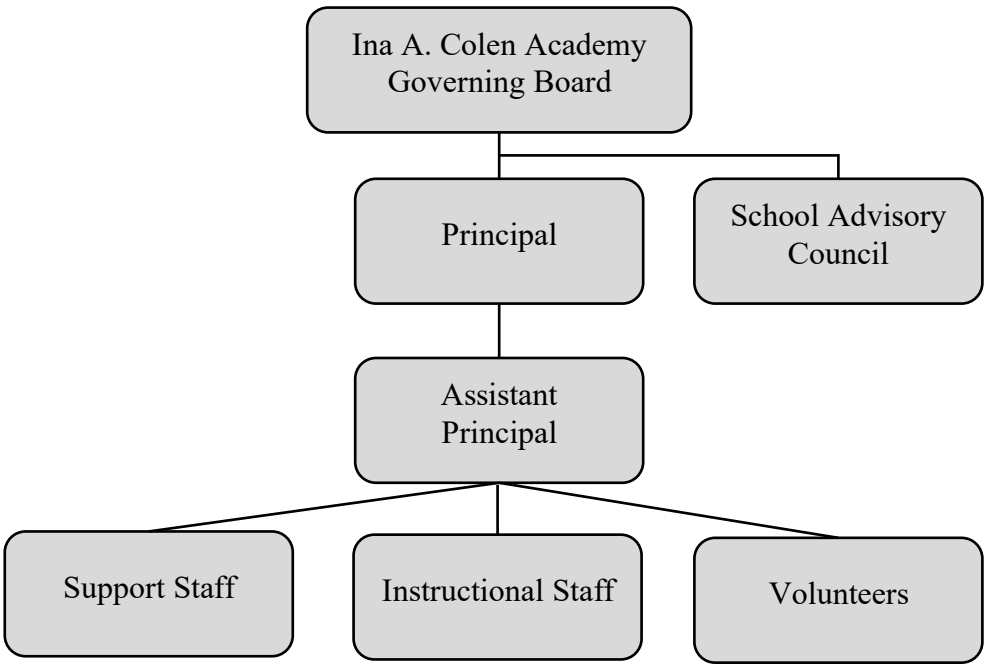
Pre-Operational Year



1st and 2nd Years of Operation



3rd Year of Operation through End of Charter Term/Full Capacity



Attachment N: School Leader Job Description

Attachment N: Principal Job Description

The principal leads the implementation of the mission and vision of the School, maintains high academic standards in curriculum, educational practices and student performance, and manages School facilities and finances, while creating a stable and nurturing School environment for faculty and students. The principal provides strong organizational and instructional leadership, in order to assure high student outcomes.

Qualifications

Florida certification in Educational Leadership, School Principal, Administration, or Administration and Supervision required within the first year of employment.

Master's degree and five (5) years of related professional experience required. Charter School experience preferred.

Terms

The principal reports to the Governing Board. This is a 12-month position.

Duties and Responsibilities

Duties and responsibilities of the principal fall into the following categories:

Leadership – The principal is expected to:

- develop and implement the School vision and mission;
- implement, evaluate and report the School's goals and objectives, as stated in the charter, to key stakeholders, including the district School board and superintendent;
- maintain a positive School/community climate and a safe and healthy environment; and
- encourage teachers and pupils to perform to the best of their ability.

Curriculum and Instruction – The principal is expected to:

- plan, implement, and evaluate the School instructional program based on student needs and within state guidelines;
- compile and prepare all student achievement outcomes;
- supervise and coordinate School-wide programs, curricula and course options;
- review teacher lesson plans and instruction to ensure correlation with the Florida Standards;
- coordinate and supervise the testing and assessment program; and
- ensure that all academic components of the School's charter are being met.

Student Outcomes – To ensure students achieve to their greatest potential, the principal must:

- solicit input from all stakeholder groups and facilitate the development of a School improvement plan (SIP) that addresses all aspects of School and student performance;
- support data-based decision making and implementation of an organized, coherent, and effective multi-tiered system of student supports (MTSS).

Faculty and Staff –To effectively lead the faculty and staff, the principal must:

- determine staffing needs;
- coordinate and conduct the interview process and make hiring and termination decisions for all staff;
- supervise all staff;
- coordinate, supervise, and conduct the evaluations of all staff; and
- develop and supervise new teacher programs.

School Environment and Facilities Management – To effectively manage the facilities and the School environment, the principal must:

- supervise all students;
- implement and enforce attendance and tardy policies and procedures for all students;
- enforce the discipline plan and assist teachers with all concerns and issues related to student behavior;
- develop and implement School rules and regulations;
- plan, implement, supervise, and evaluate all non-academic programs, (i.e., athletics, extra-curricular, co-curricular);
- plan and participate in special events; and
- assume responsibility for the buildings, grounds, equipment and supplies of the School; supervise the work of the custodians and maintenance staff, reporting to the governing board the conditions and needs of the School.

Finances – To provide sound fiscal leadership, the principal must:

- supervise and coordinate the budgetary process;
- ensure that the School is operating within the set budget; and
- oversee the proper financial record keeping processes and maintain inventory control of all School resources.

Public Relations – To champion the mission and vision of the School within the School community and the community at large, the principal must:

- recruit students and faculty for the School as needed;
- facilitate frequent communication to the parents of the School community;
- interpret the educational program of the School and School system to the community;
- establish business partnerships and positive relationships with community leaders; and
- initiate fundraising activities.

Professional Development – The principal must lead by example regarding continuing education and professional development. To lead effectively in these areas, the principal must:

- 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; and
- be familiar with Florida Statutes and regulations related to charter schools and public education in the state, understand how they may impact the School, and report to the Board regarding any significant changes or developments.

Administrative –To ensure administrator duties are implemented effectively, the principal must:

- oversee the grade reporting system;
- monitor substitute teachers and the class coverage process;
- supervise and coordinate student registration, scheduling, and master scheduling construction;
- maintain records such as but not limited to student test scores, attendance records, overseeing IEPs, and all other reports as needed for efficient operation of the School and compliance with federal, state and local requirements; and
- attend and participate in meetings of the Board and its committees as requested.

Attachment O: Principal Qualifications

Ina A. Colen Academy

Principal Qualifications

The principal leads the implementation of the mission and vision of the School, maintains high academic standards in curriculum, educational practices and student performance, and manages School facilities and finances, while creating a stable and nurturing School environment for faculty and students. The principal provides strong organizational and instructional leadership, in order to assure high student outcomes.

Qualifications

Florida certification in Educational Leadership, School Principal, Administration, or Administration and Supervision required within the first year of employment. Five (5) years of related professional experience required. Master's degree required. Charter School experience preferred.

Criteria

Leadership: The principal leads the School academically and champions the vision and mission of the School in the community.

Curriculum and Instruction: The chosen curriculum provides the foundation for an innovative, rigorous, content-rich program of study that fosters high standards of intellectual and academic achievement and promotes social and emotional development. The principal ensures that the curriculum, both content and delivery, supports these goals.

Student Outcomes: High student achievement in concert with emotional and physical health are the principal's top priorities. Through implementation of a multi-tiered system of student supports (MTSS) that includes collaborative problem solving, the principal monitors student performance and overall climate within the School. The principal also stays abreast of current educational trends to support student success in the classroom and in society.

Faculty and Staff: The principal cultivates and rewards excellence in the classroom through awareness of strengths and deficiencies in the curriculum and in the academic delivery. The principal charts the course for the faculty's academic and professional growth and fosters strong relationships among staff and faculty, as well as establishes open communication among the Board, faculty, staff, and parents. The principal creates a safe, positive, and collegial environment and ensure the professionalism of faculty and staff.

School Environment and Facilities Management: The principal's oversight of student success and achievement includes both academic success and the development and implementation of a strong social emotional program. The principal must recognize academic and civic excellence and champion education to students and families. The principal ensures that students and faculty are safe, that the environment remains positive and orderly, and that the primary focus remains on learning.

Financial Management: In order for the school to thrive, the principal must take an active role in the financial management of the School, including setting budget priorities and possessing a general knowledge of the School's fiscal situation.

Public Relations: The principal fosters a positive image of the School and an understanding of the School's mission and vision within the community.

Professional Development: The principal leads by example regarding continuing education and professional development.

Administration: The principal demonstrates strong managerial capabilities; successful experience working with School or advisory educational boards; knowledge of the needs of student population; and excellent communication skills.

Attachment P: Other Administrative/Leadership Job Descriptions

Attachment P: Assistant Principal for Curriculum and Instruction Job Description

The assistant principal (AP) is second only to the principal in the administration of the School and serves as liaison between principal and other School personnel. The AP for Curriculum and Instruction assists the principal with the academic program of the School. In addition, this position assumes any duties assigned by the principal and is fully responsible for the School program in the absence of the principal.

Qualifications

Florida certification in Educational Leadership, School Principal, Administration, or Administration and Supervision required within the first year of employment. Three (3) years of related professional experience required. Master's Degree is required.

Terms

The AP reports to the principal; this is an 11-month position.

Duties and Responsibilities

The AP for Curriculum and Instruction supports and aides the principal in all tasks as directed by the principal and assists with the academic program of the school. An effective assistant principal for curriculum and instruction:

- ensures the curriculum is mapped, incorporates all aspects of the educational program, and is correlated to the Florida Standards;
- works closely with grade level and/or departmental chairs to verify implementation of curriculum (i.e., ensure the curriculum is implemented with fidelity across all classrooms and grades);
- maintains, orders, and inventories textbooks, materials, and equipment;
- plans and supervises School activities;
- supervises student movement in all aspects of the School environment including the cafeteria, buses, crowd control, and hall traffic;
- assists the principal in planning, implementing, and evaluating the School's instructional program based on student needs;
- coordinates professional learning opportunities for all staff to support the mission and vision of the School;
- participates in annual performance evaluations, both as an evaluator of teachers and as a School administrator being evaluated.

Attachment Q: Teachers – Job Description(s) and Qualifications

General Education Teacher

The teacher is the most critical link between the instructional program and the students who will be served. Those employed by the Board will have completed an extensive review by the Board to ensure they meet the standards for the School both in delivery of instruction and establishment of the learning community atmosphere.

Qualifications

Bachelor's degree and valid Florida teaching certificate required for subject and grade being taught; holds a valid Florida teaching certificate with coverage other than that required under the Florida Course Code Directory and has been properly approved to teach out-of-field (allowable for one year only); or, has been properly identified as a qualified non certificated instructional personnel with expert skill or knowledge in accordance with Rule 6A-1.0502, F.A.C. ESOL, ESE, and Gifted Endorsed teachers preferred.

Terms

Teachers report to the principal; this is a 10-month position.

Duties and Responsibilities

Teachers will be expected to fulfill the role of instructional leader at all times. Effective teachers will:

- provide for the safety and welfare of any and all students of the School
- provide instruction that contributes to academic growth and positive development of students;
- demonstrate knowledge of subject matter to be taught;
- assess the progress of the students assigned;
- report student progress and performance to parents at scheduled intervals and as specific individual needs arise;
- report student progress information to School officials at scheduled intervals;
- plan, organize and create a positive classroom learning environment;
- maintain discipline of students;
- establish classroom guidelines which support the policies of the school and enhance the learning environment for the students;
- follow and uphold the policies of the School and assist students with appropriate behavior and actions that reflect the policies of the School;
- organize and participate in School activities and functions which may occur outside the regular School schedule;
- collaborate with instructional staff to coordinate instructional activities and resources within and across the curriculum;
- support colleagues in the delivery of instruction as it pertains to areas of specialty;
- assist with management and supervision of students throughout the School day;
- attend scheduled staff meetings;
- attend meetings and professional development sessions as established by the School leadership;
- contribute to the learning community atmosphere of the School; and
- maintain the confidentiality of student information as required by school policy and Florida and Federal Law.

Exceptional Student Education (ESE) Teacher

The exceptional student education teacher is responsible for overseeing the ESE program for students on his/her caseload and ensuring that ESE procedures and services are implemented in accordance with the Individuals with Disabilities Education Act (IDEA), Florida statutes and rules related to ESE, and the M-DCPS ESE Policies and Procedures (SPandP) as approved by FLDOE.

Qualifications

Bachelor's degree and Florida certification in Exceptional Student Education (K-12). Master's degree and 3-5 years of experience is preferred.

Terms

Teachers report to the principal; this is a 10-month position.

Duties and Responsibilities

ESE teachers are expected to fulfill the tasks listed above for classroom teachers in addition to their responsibilities specific to ESE. Effective ESE teachers will:

- implement and follow all federal, state, and local guidelines for ESE programs;
- participate as a member of the team planning and/or conducting evaluations/reevaluations and determining eligibility for ESE services;
- plan and oversee use of assessment accommodations in accordance with students' IEPs;
- schedule, attend, and facilitate IEP team meetings in a manner that is informative and collaborative to seek the best instructional options for the student;
- coordinate annual reviews of IEPs with parents and other IEP team members;
- provide services in accordance with students' IEPs, meeting and providing instruction in the locations and at the times designated;
- maintain records of all communications regarding IEPs;
- maintain records of parent contacts;
- maintain student records as required by the School, district, state and federal law;
- report information as required by the School, district, state and federal law;
- provide progress information to parents at scheduled intervals and maintain records of such information;
- monitor student behavior and note strategies for improving student behavior;
- provide staff development to colleagues to ensure all students are being served in a manner commensurate with their needs;
- serve as the School's liaison to the community and other professionals regarding the needs of exceptional students; and
- maintain confidentiality of information regarding exceptional students including identity and IEP contents.

Gifted Teacher

The Gifted Teacher is responsible for working with other teachers to ensure students are being served. The specialist is expected to understand and demonstrate the use of the school's curriculum, student instruction and assessment to maximize educational achievement for all students; work collaboratively to assist teachers with implementing strategies for serving students who are identified as gifted.

Qualifications

Bachelor's degree from a fully accredited college or university. Possession of or eligibility for Florida Educators certificate with Gifted Endorsement.

Terms

Teachers report to principal; this is a 10-month position.

Duties and Responsibilities

- Works collaboratively with teachers in the school to ensure Educational Plans are being implemented;
- Assists teachers with differentiating instruction and strategies to meet the needs of the gifted students;
- Collects student performance data and reports progress toward EP goals;
- Schedules and conducts EP meetings with parents and appropriate school and agency personnel.
- Works with ESE Teacher to conduct eligibility determination meetings, data collection, etc.

English Language Learners (ELL) Teacher

Qualifications

State of Florida ESOL Endorsement.

Terms

Teachers report to the principal; this is a 10-month position.

Duties and Responsibilities

ELL teachers are expected to fulfill the tasks listed above for classroom teachers in addition to their responsibilities specific to ELL. Effective ELL teachers will:

- serve as a liaison between the students, teachers, staff members and families of ELL students;
- administer specialized assessments for ELL students and provide assistance with interpretation to family members and School staff;
- screen Home Language Surveys;
- conduct assessment of eligibility in the ELL program;
- create a learning community environment that is conductive to learning and provides social and emotional support for English Language Learners;
- assess the progress of English Language Learners; provide progress reports and communicate information with parents in their native language;
- attend IEP meetings for students with disabilities who are English Language Learners;
- monitor learning community to determine student achievement and provide translators as needed; and
- provide professional development to School staff regarding cultural and language differences.

Guidance Counselor

The Guidance Counselor provides a comprehensive school counseling program that assists all students in acquiring the skills and knowledge to maximize highest student achievement in a safe learning environment.

Qualifications

Master's degree from an accredited college or university in Counseling and State of Florida School Counselor certification or eligibility for Florida State certification. Preference to candidates who have Orientation to and/or experience in a school setting.

Terms

Guidance Counselors report to the principal; This is a 10-month position.

Duties and Responsibilities

- Implements the comprehensive school counseling program as outlined in the Schools Professional Counselor plan;
- Acts as an advocate for all students;
- Works in collaboration with other stakeholders in narrowing the achievement gap;
- Provides professional leadership to establish a culture conducive to learning;
- Counsels individual and/or small groups of students with academic, career and personal/social concerns;
- Assists students in developing a plan for achieving educational, career, and personal/social goals;
- Works with Assistant Principal on student scheduling needs;
- Consults with a variety of school based teams to facilitate appropriate placement decisions to enhance student achievement, which includes but is not limited to exceptional student staffing's, 504 determination meetings, and Problem-Solving Team;
- Confers with classroom teachers, administration, support staff, community agencies and parents regarding students and their needs;
- Provides support to teachers in the delivery of counseling program related curriculum;
- Coordinates with school and community agencies to broaden students' resources;
- Seeks resources necessary to achieve school goals;
- Guides individuals/groups of students through the development of educational plans, career awareness and personal/social growth issues;
- Identifies and disaggregates critical data, such as grades, test scores, attendance, promotion rates, graduation and postsecondary enrollment rate;
- Uses data to develop strategies to positively impact students;
- Follows guidelines of the national, state and district standards for professional school counselors;
- Adheres to ethical and legal professional standards; and
- Uses appropriate technology for counseling services

Substitute Teachers

Substitute teachers will be employed in the event a teacher is unable to attend School to fulfill the teacher's role. Persons employed in this position will have successfully met the employment criteria established by the Board and Florida law. A substitute teacher will be called on an as need basis. The job description for the substitute teacher includes but is not limited to the following:

- follow all policies and procedures as established by the Board for the School
- maintain discipline of students;
- maintain an environment that promotes the safety and welfare of students;
- report to School leadership any behavior, activity or concern deemed as threatening or compromising to the safety and welfare of students;
- manage the assigned classroom and provide instruction as prepared by the classroom teacher;
- promote active learning in the assigned classroom;
- work with students to assist and reinforce instructional objectives as established in the teacher's lesson plan;
- seek input from colleagues as needed to ensure effective delivery of instruction and to maintain classroom environment;
- maintain attendance records and other data as directed by the teacher and leadership of the School; and
- perform other duties as assigned by the School leadership.

Attachment R: Personnel Policies, if Developed

Ina A. Colen Academy Employee Handbook Development Plan

A comprehensive employee handbook is scheduled to be completed in sections by the Spring of 2022.

Policies and procedures will be developed collaboratively with the school's attorney, outside consultants, and outside service providers when appropriate (e.g., back office services provider; payroll service provider). As completed, policies will be included in the monthly governing board agenda for review and approval.

Below is an outline of topics to be addressed and policies to be developed with an anticipated timeline for development and board approval. Additional topics will be included as deemed necessary.

Topical Area	To Be Completed
Section 1 About the Manual • Mission, Vision, Board	**June 2020**
Section 2 Compensation and Benefits • Employee benefits • Work schedule • Payroll • Leave	**September 2021**
Section 3 Employee/Employer Responsibilities • Employee categories • Equal opportunity employment • Background checks and drug testing • Employment non-discrimination; • Personal conduct • Professional development and evaluation • Promotion and change of assignment • Position descriptions • Employee grievance procedures • Reporting abuse	**February 2021**
Section 4 Accounting and Finance • Guidelines for handling school funds and; checks • Internal funds • Purchase orders • Business expenditures • Reimbursement • Separation of financial duties	**May 2020**

Topical Area	To Be Completed
Section 5 Technology Services/Usage Policy and Procedures • Public relations • Social media policy • Student records	**July 2020**
Section 6 Student Policies and Procedures • Student manual • Daily attendance • Student records • Student manual • Daily attendance • Student records, • Parent-teacher conferences • Parental notification, • Communication • Discipline • Field trips • Placement of new students • Grading policy • Exceptional student education • Health and safety • Visitors • Crisis emergency plan	**March 2022**
Section 7 Teaching and Learning • Curriculum development • Lesson plans • Reporting student progress • Students with disabilities • Gifted students • English language learners • School based leadership teams • Instructional time	**May 2022**

Attachment S: Student Enrollment Application



STUDENT APPLICATION

Florida law requires charter schools to admit students via random selection (lottery) when the number of applications exceeds capacity. Completion of this form is not a guarantee of admission. The lottery process and schedule is explained on the school's website. Please be sure to return this form prior to the deadline as listed online.

Student Information

First Name	Last Name		Middle Name
School Year Applying For	**Grade Level Applying For**	**Birthdate**	**Previous School**
Street Address			
City		**State**	**Zip**

Primary Parent/Guardian Information

First Name	Last Name		Relationship	
Address (if different than student)		**City**	**State**	**Zip**
Email Address		**Home Phone**	**Mobile Phone**	

Second Parent/Guardian Information

First Name	Last Name		Relationship	
Address (if different than student)		**City**	**State**	**Zip**
Email Address		**Home Phone**	**Mobile Phone**	

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Lottery Preferences

The following list of preferences is available through the lottery process (Please see the lottery process details online). Please select any of the preferences that apply to your family.

Is a parent or guardian any of the following?	
☐ School Governing Board Member	☐ Student completed a Voluntary Prekindergarten (VPK) program provided by the charter school
☐ Active Duty Member of the Armed Forces	☐ Student has attended or is assigned to a failing school
☐ Resident of a municipality that operates a charter school in a municipality	
☐ School Employee	
☐ Business Partner of School	

Sibling Information *Include siblings already attending the school, or applying at the same time*

Sibling(s) Names (First and Last)	Incoming Grade	Current Student?	
		Yes	No
		☐	☐
		☐	☐
		☐	☐
		☐	☐

Parent Signature

Parent Signature	*Date*

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For School Usage Only

Yes	No	Option
☐	☐	Exemption eligibility confirmed
☐	☐	Random lottery number assigned
☐	☐	Rank on waiting list
☐	☐	Notify parent of student status

CC BY SA

Attachment T: Evidence of Demand for the School

STEARNS WEAVER MILLER
WEISSLER ALHADEFF & SITTERSON, P.A.

Reggie L. Bouthillier
106 East College Avenue, Suite 700
Tallahassee, FL 32301
Direct: (850) 329-4849
Cell Phone: (850) 528-7693
Email: rbouthillier@stearnsweaver.com

January 22, 2020

Kenneth D. Colen, President
On Top of the World Communities, LLC
8445 S.W. 80th Street
Ocala, Florida 34481

RE: Calesa Planned Unit Development Student Generation

Dear Ken:

This letter is provided in order to confirm the forecasted student demand from the Calesa Project, as further described herein, which On Top of the World Communities, LLC ("**OTOW Communities**") has planned to the north of the OTOW Development of Regional Impact. The Colen Family Charitable Trust ("**Charitable Trust**") is currently planning for the Ina A. Colen Academy ("**IACA**") K-8 charter school to be located on a parcel adjacent and to the east of the Calesa Project. This letter provides the basis for OTOW Communities to request that the Charitable Trust construct and reserve sufficient capacity in the IACA charter school to accommodate the forecasted student demand from the Calesa Project and to consider the potential location of a charter high school.

Calesa Project Entitlements

The Calesa Project is an approved mixed-use development encompassing 1,547.72 acres ("**Calesa Property**") fronting S.W. 80th Avenue to the west and S.W. 38th Street to the north, as shown on the attached map (**Attachment "1"**). Marion County granted approval of the Calesa Project (formerly known as "**Earl Township**") pursuant to the following series of entitlements:

1. Marion County Ordinance 18-27 designates the Calesa Property with a unique Future Land Use category as adopted into the Comprehensive Plan to recognize the vested rights granted by the State of Florida and now subject to the jurisdiction of Marion County. The applicable Future Land Use category is the "*OTOW Binding Letter of Development of Regional Impact Map "H"* dated November 13, 2018." This Map "H" land use category approves "Vested Residential" throughout the Calesa Property, except for certain locations designated for Commercial or other non-residential uses.

2. The Calesa Property has vested rights for 3,282 single-family dwelling units, 3,600 multifamily dwelling units, and nearly two million square feet of commercial use, as authorized by CSW VDRI 2018-DM05, approved on November 20, 2018. Known as a *Binding Letter of Interpretation of Modification of Vested Rights* ("BLIM"), the 2018-DM05 BLIM vests the project from transportation road concurrency for the vehicular trips equal to the vested development program. This is further verified by the attached concurrency vesting letter from Marion County (**Attachment "2"**). This positions the Calesa Project to proceed through permitting without the delays often incurred as a result of transportation concurrency requirements. The BLIM also includes an "Equivalency Matrix," which allows the conversion of land uses from one type to another and has been utilized to approve the proposed mix of uses in the Calesa Project. The proposed school is located within the Earl Employment Center, which is part of the vested lands and will be assigned its share of vested trips using the Equivalency Matrix.

3. The Calesa Property is also highly suitable for the proposed development from an environmental perspective. A Conservation area has been preserved on site through the DRI process. Similarly, an interesting archaeological site exists on the property just south of S.W 38th Avenue and west of Street A. This site has undergone required State review and has been protected as part of the Conceptual Plan. Both of these sites will provide interesting field trips for students at the school.

4. Based on the Comprehensive Plan designations and the 2018-DM05 BLIM, Marion County rezoned the Calesa Property to Planned Unit Development ("**PUD**") and approved the accompanying, attached PUD Conceptual Plan (**Attachment "3"**) for up to 5,000 dwelling units, comprised of a mix of single-family and multifamily. The Conceptual Plan identifies Residential Pods, where a mix of single family and townhouse residential units may be located, and mixed-use nodes where commercial and multifamily use may be permitted. Community/Public use is located at the northwest quadrant of the intersection of Street A and Street B, which will be directly across Street A from the proposed school site.

5. Marion County requires approval of a more detailed PUD Master Plan in order to address engineering requirements for roads, drainage, utilities and other major design elements. The PUD Master Plan is currently under review and approval is anticipated within the next few months.

6. Approval of final plats and individual site plans will proceed following approval of the PUD Master Plan.

Calesa Project Design

The approved PUD Conceptual Plan is designed to facilitate safe and efficient multimodal options for residents and students located within and outside of the Calesa Project. This has been accomplished through the following design concepts:

- Through-traffic will be limited to Street A by locating access gates at the entrances to the Residential Pods (i.e., neighborhoods). This minimizes the number of required controlled-crossings for students residing within and outside of the Calesa Project.
- The small block design combined with the network of smaller streets will disperse traffic so that local streets operate as low-volume roads. Students residing in the Calesa Project can easily walk or bike along the local streets for most of their journey to school.
- Access points are limited along S.W. 80th Avenue and S.W. 38th Street, which minimizes the number of controlled-crossings required for students walking to school from outside of the Calesa Project.
- Multi-purpose, recreational trails are planned throughout the Calesa Project as another option for students to walk or bike to school with minimal street crossings required.
- Parents will have the option of using golf carts as another transportation option for taking students to school using the multi-purpose trails and local streets.
- Speed limits on local, neighborhood streets will be maintained below 30 MPH and will be provided with sidewalks throughout the Calesa Project.
- Street A has been designed as a four-lane road with the sidewalks setback further from the roadway as compared to the local streets. This design approach allows for speeds anticipated at 35-40 MPH to achieve reasonable and efficient vehicular access to the school site, while ensuring a safe and pleasant journey for students walking or biking along that route. Please refer to the attached right-of-way cross-section designs (**Attachment "4"**) for more detail.

The Calesa Project will be constructed in phases starting at the south and progressing north and northeast with each subdivision. Street A will be constructed in advance to provide access to the school site. OTOW Communities anticipates three primary lot sizes (50', 60' and 70') with a variety of single-family products in order to provide diverse options and pricing to serve a range of household incomes. This approach maximizes residential absorption within the market, while also promoting socio-economic diversity within the development as well as an interesting mix of architecture and housing types.

Calesa Project Absorption and Student Generation

As both a highly experienced developer and builder, OTOW Communities has developed a structured, integrated approach in terms of its market evaluation, project planning and design, infrastructure phasing, entitlement approval process, development/housing programming and production, and final product marketing and sales. The key factors required to achieve consistent market penetration and maintain strong growth are:

- **Securing Entitlements.** As summarized above, the Calesa Project has secured all major entitlements at the local, state and federal level, and is well positioned to proceed on schedule with future platting and site plan approvals.
- **Accessing Capital.** Unlike most developers, OTOW Communities operates on a debt-free basis, which ensures that its projects are able to proceed without the delays that disrupt other projects.

- **Constructing Infrastructure.** The Calesa Project will be self-contained and does not require extension of infrastructure from other service providers.
- **Adaptive Marketing.** OTOW Communities has studied the local and regional market for over 40 years, utilizing both in-house experts and well-respected consulting firms to understand demographics, market trends and consumer preferences. The small block design of Calesa will allow for refinements to product lines during production, unlike other projects designed for tract housing. OTOW Communities maintains a fluid, dynamic approach to its marketing and production in order to efficiently respond to market demands.
- **Place Making.** Calesa incorporates place-making design concepts and is planned with strong amenities to provide a unique community in Marion County, as an alternative to conventional subdivisions. As such, Calesa has an advantage in terms of capturing marking share.
- **Quality Schools.** Calesa is planned as a family-oriented project. The findings set forth in this letter support the need for a school and provide the basis for the anticipated Calesa Project absorption schedule and resulting forecasted student generation. This letter confirms the need for proactive planning to address school needs, which OTOW Communities has addressed through its master planning and its commitment to donate a pad-ready parcel for the proposed school site. The foregoing findings and the following student demand analysis provide the basis for OTOW Communities to request that the Colen Family Charitable Trust construct and reserve sufficient school capacity at the donated school site for the forecasted student demand from the Calesa Project.

The attached *Calesa Absorption Schedule and Student Generation Demand* (**Attachment "5"**) forecasts that the Calesa Project will generate 951 K-8 students and 467 high school students. The *Marion County, Florida Amended and Restated Interlocal Agreement for Public School Facility Planning* ("Interlocal Agreement"), executed in 2008 by Marion County and the Marion County School District, utilizes student generation rates ("**SGRs**") from the *2006 Marion County Educational Facilities Impact Fee Study* ("**2006 Study**"). In order to account for the larger-scale units proposed in the Calesa Project, the 2006 SGRs rates were adjusted to account for the number of bedrooms proposed in Calesa, which include a mix of three-bedroom and four-bedroom units, while Calesa multifamily will average 2.5 bedrooms per unit. As such, Calesa will generate more students on average than Marion County on average due to the larger units and greater number of bedrooms. To account for this difference, the student generation rates from the 2006 Study were converted from students per single-family and multifamily unit to a weighted average number of students per bedroom. The weighted average accounts for the percentage of single-family and multifamily units in Marion County. Please refer to Attachment 5.1 for the calculations of the Calesa SGR.

Table 1. Student Generation Rates

School	Single Family SGR	Multifamily SGR	SGR per Bedroom
K-8	.158/unit	.097/unit	.188/bedroom
High	.078/unit	.040/unit	.092/bedroom

These following student generation forecasts may be conservatively low particularly in later years, considering that Marion County has focused on growing and diversifying its economic base, which would be expected to expand employment opportunities over time and attract more families as a percentage of household types. Calesa will generate at least the following student demand for K-8 and high school students:

Table 2. Calesa Project Student Demand

Calendar Year	Cumulative K-8	Cumulative High School	Cumulative Total
Q4 2021	6	3	9
CY 2022	35	17	52
CY 2023	69	34	103
CY 2024	111	55	166
CY 2025	158	78	236
CY 2026	252	124	376
CY 2027	299	147	446
CY 2028	346	170	516
CY 2029	393	193	586
CY 2030	440	216	656
CY 2031	487	239	726
CY 2032	578	284	862
CY 2033	625	307	932
CY 2034	672	330	1002
CY 2035	719	353	1072
CY 2036	766	376	1142
CY 2037	813	399	1212
CY 2038	860	422	1282
CY 2039	907	445	1352
CY 2040	**951**	**467**	**1418**

The above forecast is based on a constant student generation rate and does not apply a cohort adjustment from year to year as students matriculate through the grade levels. For example, a kindergartner in 2022 would advance to high school in 2031. A cohort analysis would not be appropriate for a development project, as it would depend on knowing the age of students during the year that the unit would be occupied. Instead, the forecast inherently assumes that units will

be occupied, sold and re-occupied over time, resulting in the average student generation per unit as calculated in Attachments 5 and 5.1.

We recommend that you transmit this letter to the Charitable Trust and request that the Charitable Trust plan, construct and reserve sufficient capacity for students from the Calesa Project in the IACA charter school to accommodate the above forecasted student demand. We also recommend that you further evaluate the projected acreage that OTOW Communities intends to donate to the Charitable Trust to ensure there will be sufficient land to accommodate Calesa's students, as well as other Marion County students, the Charitable Trust is planning to accommodate.

We look forward to our continued work on the Calesa Project.

Cordially,

Reggie Bouthillier
Ken Metcalf, AICP

cc: C. Guy Woolbright, Chief Financial Officer
Linda Massarella-Aiosa, Vice President, Marketing and Technology Communications
Robert Stepp, Director of Land Development
Jim Walkup, Project Manager
On Top of the World Communities, LLC

ATTACHMENT "1"

EARL TOWNSHIP MIXED USE PUD AMENDMENT
for
ON TOP OF THE WORLD

SECTIONS 5 & 6, TOWNSHIP 16 SOUTH, RANGE 21 EAST
&
SECTIONS 31 & 32, TOWNSHIP 15 SOUTH, RANGE 21 EAST
MARION COUNTY, FLORIDA

THIS SITE CONTAINS:
PARCEL AREA = 1,854.88 ac
AREA TO BE REZONED = 1,547.72 ac
MARION COUNTY PARCEL # 35300-000-14 & 3530-000-23

OWNER/DEVELOPER:
ON TOP OF THE WORLD COMMUNITIES, INC
CONTACT: KENNETH D. COLEN, PRESIDENT
8445 SW 80th STREET
OCALA, FLORIDA 34481-9607
PH: (352) 854-0805

CIVIL ENGINEER:
TILLMAN AND ASSOCIATES ENGINEERING, L.L.C.
JEFFREY McPHERSON, P.E.
1720 SE 16th AVE. BLDG. 100
OCALA, FLORIDA 34471
PH: (352) 387-4540

LAND USE ATTORNEY:
STEARNS WEAVER MILLER WEISSLER ALHADEFF & SITTERSON, P.A.
REGGIE L. BOUTHILLIER
106 E COLLEGE AVENUE, SUITE 700
TALLAHASSEE, FL 32301
PH: (850) 329-4849



VICINITY MAP
SCALE: 1" = 3,000'

INDEX OF SHEETS

1	COVER
2-3	DEVELOPMENT STANDARDS
4	PUD MASTER PLAN
1 of 1	BOUNDARY SURVEY (PREPARED BY JCH CONSULTING GROUP, INC.)

Tillman & Associates
ENGINEERING, L.L.C.
CIVIL ENGINEERING • PLANNING • LANDSCAPE ARCHITECTURE • SURVEYING
1720 SE 16th Ave, Bldg 100, Ocala, FL 34471
Office: (352) 387-4540 Fax: (352) 387-4545
CERTIFICATE OF AUTHORIZATION #26756

TAE PROJECT NO. 18-4058

Marion County Commission
2631-A S.E. 3rd Street • Ocala, Florida 34471

DEPT. OF COMMUNITY DEVELOPMENT
Division of Zoning
(904) 867-5130
FAX: (904) 867-5420

COMMISSIONERS
ANDY JOHNSON DIST. 1
DON GREENE DIST. 2
JEFF GANN DIST. 3
NORM PERRY DIST. 4
GEORGE McCALL DIST. 5
AREA CODE 904 620-3307

March 12, 1993

On Top of the World, Inc.
Attention: Kenneth D. Colen, President
8700 S.W. 99th Street
Ocala, Florida 34476

Re: Vesting Determination for On Top of the World, Inc.
On Top of the World and Circle Square Woods Subdivision

Dear Mr. Colen:

We have reviewed the Vesting Application and supporting data which you submitted in support of your request for a Vesting Determination.

The following is a summary of the data and findings of fact regarding this Vesting Determination:

A. A Binding Letter of Interpretation - Vested Rights, dated September 7, 1973, under File Number: BLIVR-574-018, Circle Square Woods, was issued by the Division of State Planning, State of Florida. A COPY of the subject Binding Letter of Interpretation - Vested Rights is attached hereto and incorporated herein by reference.

1. Recommendations: The recommendation contained in said Binding Letter stated:

"In view of consistency of policy, Circle Square Woods should be considered vested for the purposes of Section 380.06, F. S."

B. A Binding Letter of Development of Regional Impact Status Reconsideration, dated June 3, 1977, under File Number: 577-016, was issued by the Division of State Planning, State of Florida. A COPY of the subject Binding Letter of Development of Regional Impact is attached hereto and incorporated herein by reference.

PRINTED ON RECYCLED PAPER

1. ORDER: The Order set forth in said Binding Letter included the following:

> *"The proposed multi-family and commercial portions of the Circle Square Woods development have acquired vested rights pursuant to S380.06(12), Florida Statutes and are, therefore, exempt from the requirements of S380.06, Florida Statutes."*

C. A Binding Letter of Interpretation for Modification to a DRI with Vested Rights, dated November 3, 1978, under File Number: BLIM-578-002, was issued by the Division of State Planning, State of Florida. A COPY of the subject Binding Letter of Interpretation is attached hereto and incorporated herein by reference.

1. ORDER: The Order set forth in said Binding Letter included the following:

> *"The Division finds under Section 380.06(4) that the proposed modified plan retains vested rights and will not be required to comply with the review requirements of Chapter 380.06, Florida Statutes."*

D. A Development Order for On Top of the World -- Central Development of Regional Impact, as adopted by the Marion County Board of County Commissioners on October 12, 1982 and recorded in Official Records Book 1129, Page 0475, public records of Marion County, Florida. A COPY of said Development Order is attached hereto and incorporated herein by reference.

E. To date there has been constructed at the above described development two (2) water treatment plants with the associated water distribution system; wastewater treatment facility with capacity of .75 MGD with its associated collection system; twenty-seven (27) holes of golf; approximately sixteen (16) miles of roadway and one hundred twenty thousand (120,000) square feet of commercial development; one thousand eight hundred (1,800) residential dwelling units; and development is ongoing.

Based upon our review of the submitted documents and the facts set forth above, the documents attached hereto, and in accordance with the provisions of Section 10.4.3, Statutory Vesting, and Section 10.4.4, Common Law Vesting, Marion County Land Development Regulations, it is determined that Circle Square Woods and On Top of the World - Central Development of Regional Impact have vested development rights which are therefore exempt from the concurrency

requirements of the Marion County Land Development Code. The rights set forth in the valid and unexpired Binding Letters and Development of Regional Impact shall become a part of the Zoning Division's list of such developments.

Summary of Development Rights

3,600 dwelling units under BLIVR 578-002	719 acres
Vested Commercial Acreage under BLIVR 577-016	88 acres
3,282 Dwelling Units under BLIVR 577-016	6,412 acres
and	
32,400 Dwellings under Development of Regional Impact	5,190 acres
Commercial Acreage under Development of Regional Impact	490 Acres
Total Acreage:	12,899 acres

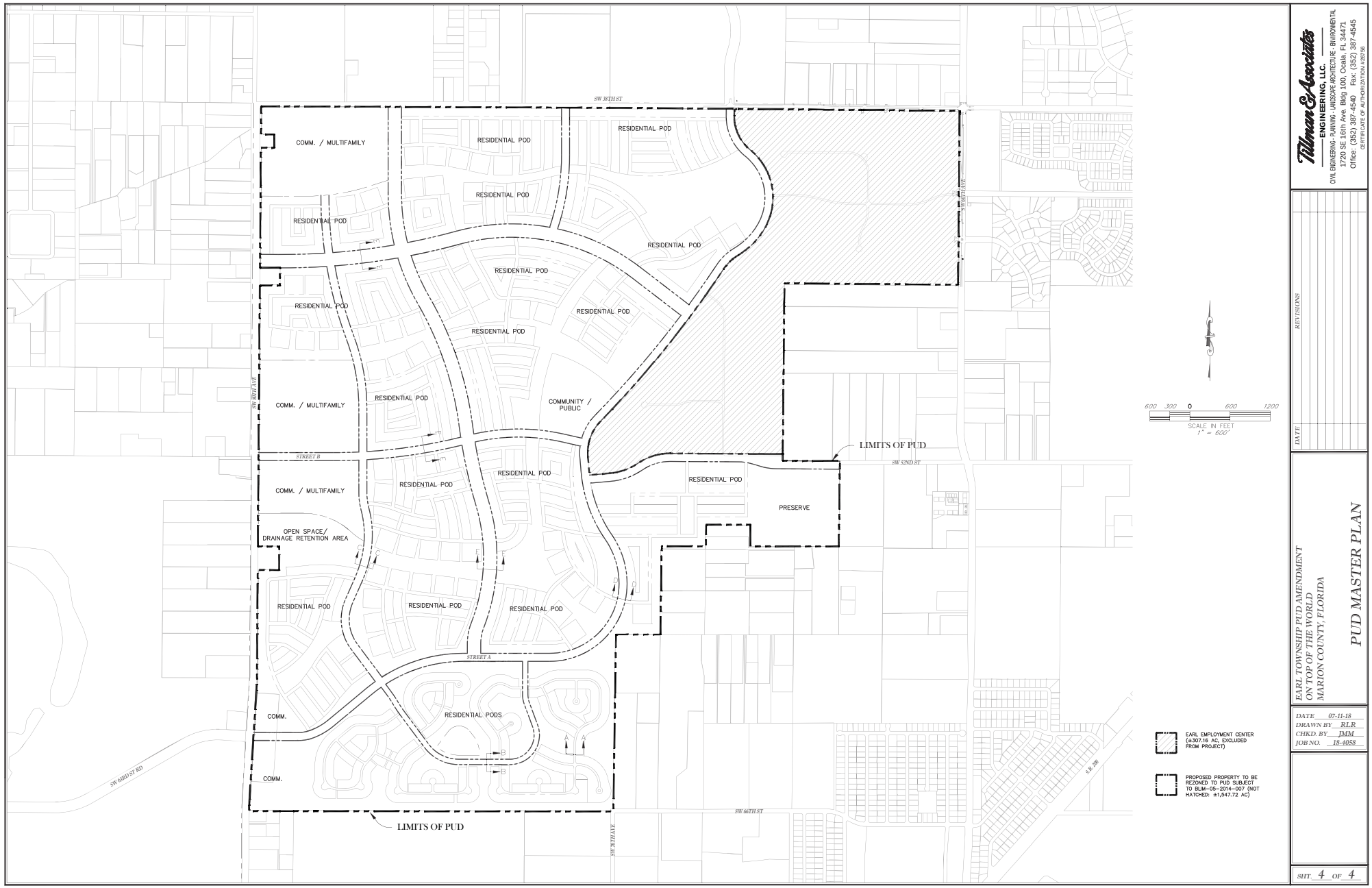
Sincerely,

Michael E. May/JB

Michael E. May
Zoning Director

MEM:cw
Enclosures (stated within)
c: Thomas D. MacNamara, Assistant County Attorney

ATTACHMENT "3"



Tillman & Associates ENGINEERING, LLC.
CIVIL ENGINEERING · PLANNING · LANDSCAPE ARCHITECTURE · ENVIRONMENTAL
1720 SE 16th Ave. Bldg 100, Ocala, FL 34471
Office: (352) 387-4540 Fax: (352) 387-4545
CERTIFICATE OF AUTHORIZATION # 28788

REVISIONS

DATE

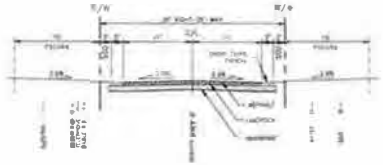
EARL TOWNSHIP PUD AMENDMENT
ON TOP OF THE WORLD
MARION COUNTY, FLORIDA

PUD MASTER PLAN

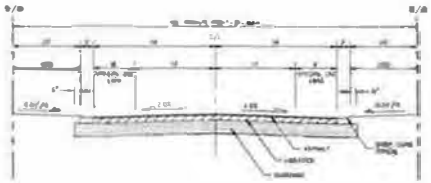
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DRAWN BY RLR
CHKD. BY JMM
JOB NO. 18-4058

SHT. 4 OF 4

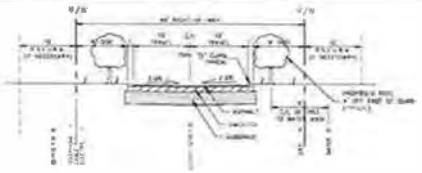
ATTACHMENT "4"



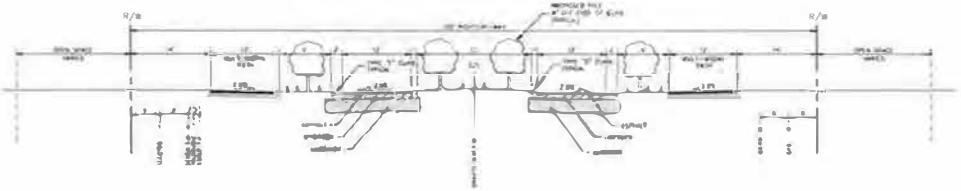
SECTION 'A'-'A'
30' RIGHT-OF-WAY
N.T.S.



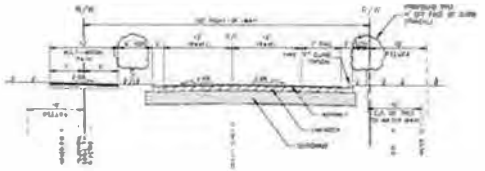
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(80' RIGHT-OF-WAY)
N.T.S.



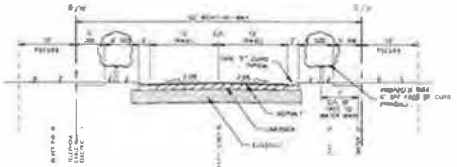
SECTION 'F'-'F'
40' RIGHT-OF-WAY
N.T.S.



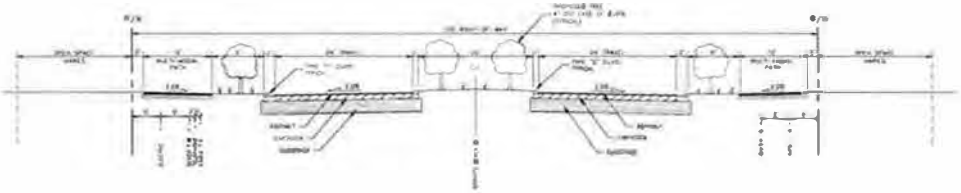
SECTION 'C'-'C'
120' RIGHT-OF-WAY (2 LANE)
N.T.S.



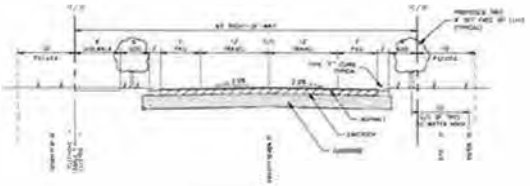
SECTION 'G'-'G'
50' RIGHT-OF-WAY (SINGLE PARKING)
N.T.S.



SECTION 'H'-'H'
50' RIGHT-OF-WAY
N.T.S.



SECTION 'D'-'D'
120' RIGHT-OF-WAY (4 LANE)
N.T.S.



SECTION 'I'-'I'
60' RIGHT-OF-WAY (DUAL PARKING)
N.T.S.



SECTION 'E'-'E'
200' RIGHT-OF-WAY
N.T.S.

Tillman & Associates
ENGINEERING, LLC.
CIVIL ENGINEERING · PLANNING · LANDSCAPE ARCHITECTURE · ENVIRONMENTAL
1720 SE 16th Ave, Bldg 100, Ocala, FL 34471
Office: (352) 387-4510 Fax: (352) 387-4515
CERTIFICATE OF AUTHORIZATION #6796

EARL TOWNSHIP MIXED USE PUD MASTER PLAN
ON TOP OF THE WORLD
MARION COUNTY, FLORIDA

TYPICAL ROADWAY CROSS SECTIONS

DATE 1-15-19
DRAWN BY MJK
CHKD BY LWM
JOB NO 12-3047

SHT 12 OF 12

ATTACHMENT 5 - CALESA PROJECT ABSORPTION SCHEDULE AND STUDENT GENERATION DEMAND

Calendar Year	50' Product/3 BR	60' Product/3 BR	70' Product/4 BR	Multi Family	Total Closings	Cumulative K-8	Cumulative High School	Cumulative Total
Q4 2021	15	15	N/A		30	6	3	9
CY 2022	60	60	30		150	35	17	52
CY 2023	70	70	40		180	69	34	103
CY 2024	80	80	60		220	111	55	166
CY 2025	82	82	82		246	158	78	236
CY 2026	82	82	82	250	496	252	124	376
CY 2027	82	82	82		246	299	147	446
CY 2028	82	82	82		246	346	170	516
CY 2029	82	82	82		246	393	193	586
CY 2030	82	82	82		246	440	216	656
CY 2031	82	82	82		246	487	239	726
CY 2032	82	82	82	234	480	578	284	862
CY 2033	82	82	82		246	625	307	932
CY 2034	82	82	82		246	672	330	1002
CY 2035	82	82	82		246	719	353	1072
CY 2036	82	82	82		246	766	376	1142
CY 2037	82	82	82		246	813	399	1212
CY 2038	82	82	82		246	860	422	1282
CY 2039	82	82	82		246	907	445	1352
CY 2040	82	82	82		230	**951**	**467**	**1418**
Total					4984			

Note: Student Generation Rate from Marion County 2006 Impact Fee Study converted from students/unit to students/bedroom.
Calesa unit count = 5,000 units with 4,984 projected to close by 2040.

ATTACHMENT 5.1 - Calesa Student Generation Rate

	Marion County				Calesa Project		
Bedrooms/Unit	Units by # of Bedrooms	Perc. Dist.	# of Bedrooms	Units by # of Bedrooms	Perc. Dist.	# of Bedrooms
0	2168	1.30%	0			0
1	7598	4.57%	7598			0
2	58369	35.09%	116738	250		500
3	81663	49.09%	244989	3324	66.48%	9972
4	14472	8.70%	57888	1426	28.52%	5704
5	2087	1.25%	10435	0		0
Total	**166357**	100.00%	**437648**	5000		16176

Data Source: ACS Table B25041

% Single Family in Marion County	91.56%	(ACS 2017 Five Year - Table B25024)		
K-8 Student Generation Rate per Single Family Unit	0.0158	(2006 Impact Fee Study)		
K-8 Student Generation Rate per Multifamily Unit	0.0780	(2006 Impact Fee Study)		
K-8 Student Generation per Unit	0.153	(weighted average based on 91.56% single family)		
K-8 Students	25428	(C11 x C17)	940	(H11 x C19)
K-8 Students/Bedroom	0.0581	(C18/D11)		
Calesa K-8 Student Generation Rate/S.F. Unit			0.188	(H18/F11)
High School Student Generation Rate per Single Family Unit	0.078	(2006 Impact Fee Study)		
K-8 Student Generation Rate per Multifamily Unit	0.04	(2006 Impact Fee Study)		
High School Student Generation Rate	0.075	(weighted average based on 91.56% single family confirmed by ACS Table B25024)		
High School Students	12442	(C11 x C23)	460	(H11 x C25)
High School Students/Bedroom	0.028	(C24/E11)		
Calesa High School Student Generation Rate/Unit			0.092	(H24/F11)

Attachment U: Evidence of Facility Funding Sources

COLEN FAMILY
CHARITABLE TRUST

January 25, 2020

Dear Board Members of Ina A. Colen Academy:

On behalf of the Colen Family Charitable Trust ("Trust), I am pleased to confirm with you that the Trust has commenced designing the Ina A. Colen Academy ("IACA"), a K-8 charter school, and is prepared to construct the IACA which is estimated to cost approximately $25 million, and will be the subject of a long term lease with Ina A. Colen Academy, LLC. I'm excited about IACA, and look forward to working with you to implement the vision of IACA which has been created by the Trust.

The Trust is a not for profit organization whose mission is to create and support educational initiatives that develop passionate learners capable of making the best decisions for themselves and the society in which they live. IACA will be a testament to that mission.

Sincerely,



Kenneth D. Colen
Trustee
Colen Family Charitable Trust

8435 SW 80TH STREET | SUITE 2 | OCALA, FL 34481
(O) 352.387.7492 | (C) 352.239.8144

Attachment W: Florida Charter School Revenue Estimating Worksheet

Revenue Estimate Summary for Ina A. Colen Academy K-8

	Year 1	Year 2	Year 3	Year 4	Year 5
Base Student Allocation	$4,279.49	$4,322.28	$4,365.51	$4,409.16	$4,453.25
Assumed Base FEFP Percentage Increase	0.000%	1.000%	1.000%	1.000%	1.000%
Assumed Other Funds Percentage Increase	0.000%	1.000%	1.000%	1.000%	1.000%
Assumed ESE Guarantee Income % Increase	0.000%	0.000%	0.000%	0.000%	0.000%
District Cost Differential	0.9487	0.9487	0.9487	0.9487	0.9487

FEFP State and Local Funding

	Year 1			Year 2			Year 3			Year 4			Year 5		
	Enr.	Cost Factor	Base Funding	Enr.	Cost Factor	Base Funding	Enr.	Cost Factor	Base Funding	Enr.	Cost Factor	Base Funding	Enr.	Cost Factor	Base Funding
101 Basic K-3	95.000	1.120	$ 431,979	134.000	1.106	$ 607,718	186.000	1.106	$ 851,985	238.000	1.106	$ 1,101,076	277.000	1.106	$ 1,294,319
111 Basic K-3 with ESE Services	21.000	1.120	$ 95,490	32.000	1.106	$ 145,127	46.000	1.106	$ 210,706	58.000	1.106	$ 268,329	68.000	1.106	$ 317,739
102 Basic 4-8	70.000	1.000	$ 284,197	152.000	1.000	$ 623,284	233.000	1.000	$ 964,983	296.000	1.000	$ 1,238,160	357.000	1.000	$ 1,508,254
112 Basic 4-8 with ESE Services	13.000	1.000	$ 52,779	32.000	1.000	$ 131,218	52.000	1.000	$ 215,361	69.000	1.000	$ 288,625	88.000	1.000	$ 371,783
103 Basic 9-12	-	1.005	$ -	-	1.001	$ -	-	1.001	$ -	-	1.001	$ -	-	1.001	$ -
113 Basic 9-12 with ESE Services	-	1.005	$ -	-	1.001	$ -	-	1.001	$ -	-	1.001	$ -	-	1.001	$ -
254 ESE Level 4 (Grade Level PK-3)	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -
254 ESE Level 4 (Grade Level 4-8)	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -
254 ESE Level 4 (Grade Level 9-12)	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -	-	3.637	$ -
255 ESE Level 5 (Grade Level PK-3)	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -
255 ESE Level 5 (Grade Level 4-8)	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -
255 ESE Level 5 (Grade Level 9-12)	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -	-	5.587	$ -
130 ESOL (Grade Level PK-3)	10.000	1.181	$ 47,948	14.000	1.181	$ 67,799	20.000	1.181	$ 97,824	28.000	1.181	$ 138,323	33.000	1.181	$ 164,653
130 ESOL (Grade Level 4-8)	5.000	1.181	$ 23,974	14.000	1.181	$ 67,799	23.000	1.181	$ 112,497	31.000	1.181	$ 153,143	39.000	1.181	$ 194,590
130 ESOL (Grade Level 9-12)	-	1.181	$ -	-	1.181	$ -	-	1.181	$ -	-	1.181	$ -	-	1.181	$ -
300 Career Education (Grades 9-12)	-	1.005	$ -	-	1.001	$ -	-	1.001	$ -	-	1.001	$ -	-	1.001	$ -
Total Enrollment	**214.000**		**$ 936,367**	**378.000**		**$ 1,642,945**	**560.000**		**$ 2,453,356**	**720.000**		**$ 3,187,656**	**862.000**		**$ 3,851,338**

Additional FTE

Advanced Placement	-		-	-		-	-		-	-		-	-		-
International Baccalaureate	-		-	-		-	-		-	-		-	-		-
Advanced International Certificate	-		-	-		-	-		-	-		-	-		-
Industry Certified Career Education	-		-	-		-	-		-	-		-	-		-
Early High School Graduation	-		-	-		-	-		-	-		-	-		-
Small District ESE Supplement	-		-	-		-	-		-	-		-	-		-
Total Additional Funding	**0.00**		**$ -**	**0.00**		**$ -**	**0.00**		**$ -**	**0.00**		**$ -**	**0.00**		**$ -**

Total Unweighted FTE	**214.000**	**378.000**	**560.000**	**720.000**	**862.000**
Total Weighted FTE	**230.635**	**400.664**	**592.375**	**762.055**	**911.602**
Total Base Funding	**$ 936,367**	**$ 1,642,945**	**$ 2,453,356**	**$ 3,187,656**	**$ 3,851,338**

ESE Guranteed Allocation

	Year 1			Year 2			Year 3			Year 4			Year 5		
	Enr.	ESE Rate	ESE Amt	Enr.	ESE Rate	ESE Amt	Enr.	ESE Rate	ESE Amt	Enr.	ESE Rate	ESE Amt	Enr.	ESE Rate	ESE Amt
PK-3 (Matrix Level 251)	21.000	$ 962	$ 20,202	32.000	$ 962	$ 30,784	46.000	$ 962	$ 44,252	58.000	$ 962	$ 55,796	68.000	$ 962	$ 65,416
PK-3 (Matrix Level 252)	-	$ 3,107	$ -	-	$ 3,107	$ -	-	$ 3,107	$ -	-	$ 3,107	$ -	-	$ 3,107	$ -
PK-3 (Matrix Level 253)	-	$ 6,341	$ -	-	$ 6,341	$ -	-	$ 6,341	$ -	-	$ 6,341	$ -	-	$ 6,341	$ -
4-8 (Matrix Level 251)	13.000	$ 1,079	$ 14,027	32.000	$ 1,079	$ 34,528	52.000	$ 1,079	$ 56,108	69.000	$ 1,079	$ 74,451	88.000	$ 1,079	$ 94,952
4-8 (Matrix Level 252)	-	$ 3,224	$ -	-	$ 3,224	$ -	-	$ 3,224	$ -	-	$ 3,224	$ -	-	$ 3,224	$ -
4-8 (Matrix Level 253)	-	$ 6,457	$ -	-	$ 6,457	$ -	-	$ 6,457	$ -	-	$ 6,457	$ -	-	$ 6,457	$ -
9-12 (Matrix Level 251)	-	$ 768	$ -	-	$ 768	$ -	-	$ 768	$ -	-	$ 768	$ -	-	$ 768	$ -
9-12 (Matrix Level 252)	-	$ 2,913	$ -	-	$ 2,913	$ -	-	$ 2,913	$ -	-	$ 2,913	$ -	-	$ 2,913	$ -
9-12 (Matrix Level 253)	-	$ 6,146	$ -	-	$ 6,146	$ -	-	$ 6,146	$ -	-	$ 6,146	$ -	-	$ 6,146	$ -
Total ESE Guarantee			**$ 34,229**			**$ 65,312**			**$ 100,360**			**$ 130,247**			**$ 160,368**

Additional Calculations

	Year 1		Year 2		Year 3		Year 4		Year 5	
	UFTE	WFTE	UFTE	WFTE	UFTE	WFTE	UFTE	WFTE	UFTE	WFTE
Charter School Enrollment	214.0	230.6	378.0	400.7	560.0	592.4	720.0	762.1	862.0	911.6
Overall District Enrollment	42,460.2	45,968.3	42,460.2	45,968.3	42,460.2	45,968.3	42,460.2	45,968.3	42,460.2	45,968.3
Charter Percentage of District	**0.504000%**	**0.501700%**	**0.8902%**	**0.8716%**	**1.3189%**	**1.2887%**	**1.6957%**	**1.6578%**	**2.0301%**	**1.9831%**

UFTE Shares																
Supplemental Academic Instruction	$ 12,979,091	0.5040%	$ 65,415	$ 13,108,882	0.8902%	$ 116,695	$ 13,239,971	1.3189%	$ 174,622	$ 13,372,370	1.6957%	$ 226,755	$ 13,506,094	2.0301%	$ 274,187
Discretionary Millage Compression Allocation	$ 8,509,865	0.5040%	$ 42,890	$ 8,594,964	0.8902%	$ 76,512	$ 8,680,913	1.3189%	$ 114,493	$ 8,767,722	1.6957%	$ 148,674	$ 8,855,400	2.0301%	$ 179,773
Digital Classrooms Allocation	$ 278,275	0.5040%	$ 1,403	$ 281,058	0.8902%	$ 2,502	$ 283,868	1.3189%	$ 3,744	$ 286,707	1.6957%	$ 4,862	$ 289,574	2.0301%	$ 5,879
Safe Schools Allocation	$ 2,711,730	0.5040%	$ 13,667	$ 2,738,847	0.8902%	$ 24,381	$ 2,766,236	1.3189%	$ 36,484	$ 2,793,898	1.6957%	$ 47,376	$ 2,821,837	2.0301%	$ 57,286
Instructional Materials Allocation	$ 3,220,720	0.5040%	$ 16,232	$ 3,252,927	0.8902%	$ 28,958	$ 3,285,456	1.3189%	$ 43,332	$ 3,318,311	1.6957%	$ 56,269	$ 3,351,494	2.0301%	$ 68,039
Mental Health Assistance Allocation	$ 1,122,777	0.5040%	$ 5,659	$ 1,134,005	0.8902%	$ 10,095	$ 1,145,345	1.3189%	$ 15,106	$ 1,156,798	1.6957%	$ 19,616	$ 1,168,366	2.0301%	$ 23,719
Total Funds Compression Allocation	$ 3,417,714	0.5040%	$ 17,225	$ 3,451,891	0.8902%	$ 30,729	$ 3,486,410	1.3189%	$ 45,982	$ 3,521,274	1.6957%	$ 59,710	$ 3,556,487	2.0301%	$ 72,200
WFTE Shares																
Declining Enrollment	$ 159,576	0.5017%	$ 801	$ 161,172	0.8716%	$ 1,405	$ 162,783	1.2887%	$ 2,098	$ 164,411	1.6578%	$ 2,726	$ 166,055	1.9831%	$ 3,293
Sparsity Supplement	$ -	0.5017%	$ -	$ -	0.8716%	$ -	$ -	1.2887%	$ -	$ -	1.6578%	$ -	$ -	1.9831%	$ -
Reading Allocations	$ 1,810,006	0.5017%	$ 9,081	$ 1,828,106	0.8716%	$ 15,934	$ 1,846,387	1.2887%	$ 23,794	$ 1,864,851	1.6578%	$ 30,915	$ 1,883,500	1.9831%	$ 37,352
Discretionary Local Effort	$ 14,835,876	0.5017%	$ 74,432	$ 14,984,235	0.8716%	$ 130,603	$ 15,134,077	1.2887%	$ 195,033	$ 15,285,418	1.6578%	$ 253,402	$ 15,438,272	1.9831%	$ 306,156
Proration to Funds Available	$ -	0.5017%	$ -	$ -	0.8716%	$ -	$ -	1.2887%	$ -	$ -	1.6578%	$ -	$ -	1.9831%	$ -
Discretionary Lottery	$ 137,539	0.5017%	$ 690	$ 138,914	0.8716%	$ 1,211	$ 140,304	1.2887%	$ 1,808	$ 141,707	1.6578%	$ 2,349	$ 143,124	1.9831%	$ 2,838
Class Size Reduction (PK-3)	141.730	$ 1,321	$ 177,673	200.130	$ 1,335	$ 253,392	280.212	$ 1,348	$ 358,335	360.444	$ 1,361	$ 465,545	420.543	$ 1,375	$ 548,600
Class Size Reduction (4-8)	88.905	$ 901	$ 76,021	200.534	$ 910	$ 173,188	312.163	$ 919	$ 272,290	401.611	$ 929	$ 353,816	491.059	$ 938	$ 436,945
Class Size Reduction (9-12)	-	$ 904	$ -	-	$ 913	$ -	-	$ 922	$ -	-	$ 931	$ -	-	$ 940	$ -
Class Size Reduction Totals	**230.635**		**$ 253,694**	**400.664**		**$ 426,580**	**592.375**		**$ 630,625**	**762.055**		**$ 819,361**	**911.602**		**$ 985,545**
Transportation - All Fundable Riders	103.000	$ 417	$ 42,951	181.000	$ 421	$ 76,232	269.000	$ 425	$ 114,428	346.000	$ 430	$ 148,654	414.000	$ 434	$ 179,648
Transportation - ESE Riders	-	$ 1,483	$ -	-	$ 1,498	$ -	-	$ 1,513	$ -	-	$ 1,528	$ -	-	$ 1,543	$ -
Federal Military & Indian Lands	-	$0	$ -	-	$ -	$ -	-	$ -	$ -	-	$ -	$ -	-	$ -	$ -
Federal Civilians on Federal Lands	-	$ -	$ -	-	$ -	$ -	-	$ -	$ -	-	$ -	$ -	-	$ -	$ -
Federal Students with Disabilities	-	$0	$ -	-	$ -	$ -	-	$ -	$ -	-	$ -	$ -	-	$ -	$ -
Fed. Connected Student Supplement	**0.000**		**$ -**	**0.000**		**$ -**	**0.000**		**$ -**	**0.000**		**$ -**	**0.000**		**$ -**
300 Lowest Performing Schools Allocation			$ -			$ -			$ -			$ -			$ -
Dual Enrollment Instructional Materials			$ -			$ -			$ -			$ -			$ -
ESE Applications Allocation			$ -			$ -			$ -			$ -			$ -
Florida Teachers Classroom Supply Assistance	0	$ -	$ -	0	$ -	$ -	0	$ -	$ -	0	$ -	$ -	0	$ -	$ -

FEFP Totals					
Total Funding	**$ 1,514,736**	**$ 2,650,094**	**$ 3,955,265**	**$ 5,138,572**	**$ 6,207,621**
Per Student Average	**$ 7,078**	**$ 7,011**	**$ 7,063**	**$ 7,137**	**$ 7,201**
District Fee Percentage	**5.00%**	**5.00%**	**5.00%**	**5.00%**	**5.00%**
Maximum Students For Fee	**250**	**250**	**250**	**250**	**250**
Total District Fee	**$ 75,737**	**$ 87,635**	**$ 88,287**	**$ 89,211**	**$ 90,018**
Total To Reallocate To Capital Outlay	**$ -**	**$ 44,869**	**$ 109,476**	**$ 167,717**	**$ 220,363**

Revenue Estimate Worksheet for Ina A. Colen Academy K-8

Based on the 2019-20 FEFP Conference Calculation

School District: Marion

1. 2019-20 FEFP State and Local Funding

Base Student Allocation $4,279.49 District Cost Differential: 0.9487

Program	Number of FTE	Program Cost Factor	Weighted FTE (2) x (3)	2019-20 Base Funding (WFTE x BSA x DCD)
(1)	(2)	(3)	(4)	(5)
101 Basic K-3	95.00	1.120	106.4000	$ 431,979
111 Basic K-3 with ESE Services	21.00	1.120	23.5200	$ 95,490
102 Basic 4-8	70.00	1.000	70.0000	$ 284,197
112 Basic 4-8 with ESE Services	13.00	1.000	13.0000	$ 52,779
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)*	0.00	3.637	0.0000	$ -
254 ESE Level 4 *(Grade Level 4-8)*	0.00	3.637	0.0000	$ -
254 ESE Level 4 *(Grade Level 9-12)*	0.00	3.637	0.0000	$ -
255 ESE Level 5 *(Grade Level PK-3)*	0.00	5.587	0.0000	$ -
255 ESE Level 5 *(Grade Level 4-8)*	0.00	5.587	0.0000	$ -
255 ESE Level 5 *(Grade Level 9-12)*	0.00	5.587	0.0000	$ -
130 ESOL *(Grade Level PK-3)*	10.00	1.181	11.8100	$ 47,948
130 ESOL *(Grade Level 4-8)*	5.00	1.181	5.9050	$ 23,974
130 ESOL *(Grade Level 9-12)*	0.00	1.181	0.0000	$ -
300 Career Education *(Grades 9-12)*		1.005	0.0000	$ -
Totals	214.00		230.6350	$ 936,367

Letters in Parentheses Refer to Notes at Bottom of Worksheet:

Additional FTE (a)	Number of FTE *Charter schools should contact their school district sponsor regarding eligible FTE. Please note that "Number of FTE" is NOT equivalent to number of students enrolled in these courses or programs. Please refer to footnote (a) below.*	2019-20 Base Funding (WFTE x BSA x DCD)
Advanced Placement	0.00	$ -
International Baccalaureate	0.00	$ -
Advanced International Certificate	0.00	$ -
Industry Certified Career Education	0.00	$ -
Early High School Graduation	0.00	$ -
Small District ESE Supplement	0.00	$ -

Total Additional FTE	0.0000	Additional Base Funds	$ -
Total Funded Weighted FTE	230.6350	Total Base Funding	$ 936,367

2. ESE Guaranteed Allocation:

FTE	Grade Level	Matrix Level	Guarantee Per Student	
21.00	PK-3	251	$ 962	$ 20,202
0.00	PK-3	252	$ 3,107	$ -
0.00	PK-3	253	$ 6,341	$ -
13.00	4-8	251	$ 1,079	$ 14,027
0.00	4-8	252	$ 3,224	$ -
0.00	4-8	253	$ 6,457	$ -
0.00	9-12	251	$ 768	$ -
0.00	9-12	252	$ 2,913	$ -
0.00	9-12	253	$ 6,146	$ -
34.00			Total ESE Guarantee	$ 34,229

Additional Funding from the ESE Guaranteed Allocation. Enter the FTE from 111,112 and 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. This total should equal all FTE from programs 111, 112 and 113 above.

Total FTE with ESE Services

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: 214.00 ÷ District's Total UFTE: 42,460.16 = 0.5040%

3B. Divide school's Weighted FTE (WFTE) total computed in Section 1, cell E37 above by the district's total WFTE to obtain school's WFTE share. Charter School WFTE: 230.64 ÷ District's Total WFTE: 45,968.33 = 0.5017%

4. Supplemental Academic Instruction (UFTE share)	(b)	12,979,091	x	0.5040%	$	65,415
5. Discretionary Millage Compression Allocation .748 Mills (UFTE share)	(b)	8,509,865	x	0.5040%	$	42,890
6. Digital Classrooms Allocation (UFTE share)	(b)(d)	278,275	x	0.5040%	$	1,403
7. Safe Schools Allocation (UFTE share)	(b)	2,711,730	x	0.5040%	$	13,667
8. Instructional Materials Allocation (UFTE share)	(b)	3,220,720	x	0.5040%	$	16,232
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. Mental Health Assistance Allocation (UFTE share)	(b)	1,122,777	x	0.5040%	$	5,659
10. Total Funds Compression Allocation (UFTE share)	(b)	3,417,714	x	0.5040%	$	17,225
11. Declining Enrollment (WFTE share)	(c)	159,576	x	0.5017%	$	801
12. Sparsity Supplement (WFTE share)	(c)	0	x	0.5017%	$	-
13. Reading Allocation (WFTE share)	(c)	1,810,006	x	0.5017%	$	9,081
14. Best and Brightest Teacher/Principal Allocation	(f)					
15. Discretionary Local Effort (WFTE share)	(c)	14,835,876	x	0.5017%	$	74,432
16. Proration to Funds Available (WFTE share)	(c)	0	x	0.5017%	$	-
17. Discretionary Lottery (WFTE share)	(c)	137,539	x	0.5017%	$	690

18. Class Size Reduction Funds:

	Weighted FTE (not including Add-On)	X	DCD	X	Allocation factors				
PK - 3	141.7300		0.9487		1,321.39	=	177,673		
4-8	88.9050		0.9487		901.32	=	76,021		
9-12	0.0000		0.9487		903.50	=	0		
Total *	230.6350						Total Class Size Reduction Funds	$	253,694

*(*Total FTE should equal total in Section 1, column (4) and should not include any additional FTE from Section 1.)*

19. Student Transportation	(g)					
Enter All Adjusted Fundable Riders	$	103.00	x	417	$	42,951
Enter All Adjusted ESE Riders	$	-	x	1,483	$	-

20. Federally Connected Student Supplement (h)

Impact Aid Student Type	Number of Students	Exempt Property Allocation	Impact Aid Student Allocation		Total
Military and Indian Lands	0	$0.00	$0.00	$	-
Civilians on Federal Lands	0	$0.00	$0.00	$	-
Students with Disabilities	0		$0.00	$	-
Total				$	-

21. Florida Teachers Classroom Supply Assistance Program	(i)		$	-
22. Food Service Allocation	(j)		$	-
		Total	$	1,514,736

Attachment X: Proposed Operating Budget

Ina A. Colen Academy K-8
Five Year Budget Projections
Complete Budget - Marion County

Func	Obj	Description	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates	214 (of est. 214)	378 (of est. 378)	560 (of est. 560)	720 (of est. 720)	862 (of est. 862)	
Income Estimates								
FEFP Calculations								
3310		FEFP - Base Funding	$ 936,367	$ 1,642,945	$ 2,453,356	$ 3,187,656	$ 3,851,338	2019-20 FEFP Conf Report; 1% Yearly Inflation in Year 2; ESOL- 9%, ESE-Disabilities:13% Gifted 6%;
3310		FEFP - ESE Guarantee	$ 34,229	$ 65,312	$ 100,360	$ 130,247	$ 160,368	
3310		FEFP - Supplemental Academic Instruction	$ 65,415	$ 116,695	$ 174,622	$ 226,755	$ 274,187	
3310		FEFP - Discretionary Millage Compression	$ 42,890	$ 76,512	$ 114,493	$ 148,674	$ 179,773	
3310		FEFP - Digital Classroom Allocation	$ 1,403	$ 2,502	$ 3,744	$ 4,862	$ 5,879	
3310		FEFP - Safe Schools Allocations	$ 13,667	$ 24,381	$ 36,484	$ 47,376	$ 57,286	
3310		FEFP - Instructional Materials Allocation	$ 16,232	$ 28,958	$ 43,332	$ 56,269	$ 68,039	
3310		FEFP - Mental Health Assistance Allocation	$ 5,659	$ 10,095	$ 15,106	$ 19,616	$ 23,719	
3310		FEFP - Total Funds Compression Allocation	$ 17,225	$ 30,729	$ 45,982	$ 59,710	$ 72,200	
3310		FEFP - Declining Enrollment	$ 801	$ 1,405	$ 2,098	$ 2,726	$ 3,293	
3310		FEFP - Reading Allocation	$ 9,081	$ 15,934	$ 23,794	$ 30,915	$ 37,352	
3310		FEFP - Discretionary Local Effort	$ 74,432	$ 130,603	$ 195,033	$ 253,402	$ 306,156	
3310		FEFP - Discretionary Lottery	$ 690	$ 1,211	$ 1,808	$ 2,349	$ 2,838	
3355		FEFP - Class Size Reductions	$ 253,694	$ 426,580	$ 630,625	$ 819,361	$ 985,545	
3492		Transportation (All Riders)	$ 42,951	$ 76,232	$ 114,428	$ 148,654	$ 179,648	48% Transportation Participation
Other Income								
3261		School Lunch Reimbursements	$ 60,175.80	$ 107,839.80	$ 160,270.20	$ 207,338.40	$ 248,448.60	FRL rates at 77%, assumes 75% FRL student participation; NSLP reimbursement rates Free: $3.31, Reduced: $2.91; Reduced lunch $0.40/meal; Yr 1: 101 fte, Yr 2: 181 fte, Yr 3: 269 fte, Yr 4: 348 fte, Yr 5: 417 fte;
3397		Capital Outlay Funds	$ -	$ -	$ 281,418	$ 361,823	$ 433,183	$502 per student (eligible beginning year 3)
3451		School Lunch Collections	$ 6,048.00	$ 9,936.00	$ 14,688.00	$ 18,576.00	$ 22,032.00	Assumes 25% non FRL student participation; Full price lunch $2.40/meal; Yr 1: 14 fte, Yr 2: 23 fte, Yr 3: 34 fte, Yr 4: 43 fte, Yr 5: 51 fte;
3720		Financing / Loan Proceeds	$ 500,000.00	$ 375,000.00	$ 50,000.00	$ -	$ -	Startup and operating loans; Interest only Years 1-5 at 3% interest;
		Total Income	**$ 2,080,960**	**$ 3,142,870**	**$ 4,461,641**	**$ 5,726,309**	**$ 6,911,284**	
Expense Estimates								Salaried Positions at 1.875% annual increase and Hourly Positions at 1.5% annual increase; Other expenses at 1% annual inflation;
Function 5100 - Basic Instruction								
5100	120	Classroom Teacher Salaries	$ 495,000	$ 871,031	$ 1,307,693	$ 1,712,844	$ 2,084,258	See Staffing Plan; Average Teacher Salary $45,000; 1.875% Annual Raise;
5100	130	Other Certified Staff Member	$ -	$ 45,844	$ 93,407	$ 119,469	$ 145,413	See Staffing Plan; Average ELL Teacher Salary $45,000; 1.875% Annual Raise;
5100	140	Substitute Teachers	$ 8,800	$ 16,000	$ 24,000	$ 30,800	$ 36,800	8 days / teacher / year at $100 / day
5100	210	Retirement	$ 14,850	$ 27,506	$ 42,033	$ 54,969	$ 66,890	3% of salaries
5100	220	FICA	$ 37,868	$ 70,141	$ 107,184	$ 140,172	$ 170,570	7.65% of salaries
5100	230	Group Insurance	$ 39,600	$ 73,350	$ 112,088	$ 146,585	$ 178,374	8% of salaries
5100	240	Worker's Compensation	$ 6,188	$ 11,461	$ 17,514	$ 22,904	$ 27,871	1.25% of salaries
5100	250	Unemployment Compensation	$ 2,079	$ 3,780	$ 5,670	$ 7,277	$ 8,694	2.7% on first $7,000 / employee
5100	360	Rentals	$ 21,400	$ 38,178	$ 57,126	$ 74,182	$ 89,700	$100 / student / year
5100	510	Supplies	$ 10,700	$ 19,089	$ 28,563	$ 37,091	$ 44,850	$50 / student / year
5100	520	Textbooks	$ 55,105	$ 55,131	$ 70,081	$ 75,624	$ 81,131	$250 / new student / yr + $50 / returning student / yr + $7.50 / student / yr
5100	641	Furniture, Fixtures-Capitalized	$ 70,200	$ 47,268	$ 53,708	$ 54,245	$ 42,191	$5,850 / new classroom Year 1: 12, Year 2: 8, Year 3: 9, Year 4: 9, Year 5: 7

Func	Obj	Description	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates	214 (of est. 214)	378 (of est. 378)	560 (of est. 560)	720 (of est. 720)	862 (of est. 862)	
5100	644	Computer Hardware (Non Capitalized)	$ 48,000	$ 24,240	$ 35,499	$ 50,691	$ 37,462	2 computers per new classroom at $600 per unit + 25 unit computer lab at $600 per unit (Yr 1 & Yr 4)+ 20% refresh beginning in year 3 + $1,800 / new classroom / year;
5100	730	Dues and Fees	$ 107	$ 191	$ 286	$ 371	$ 449	$0.50 / student / year
5100	750	Other Personnel Services	$ 6,188	$ 11,461	$ 17,514	$ 22,904	$ 27,871	1.25% of salaries (payroll fees)
		5100 Sub Total	**$ 816,084**	**$ 1,314,671**	**$ 1,972,365**	**$ 2,550,128**	**$ 3,042,523**	
		Function 5200 - Exceptional Education						
5200	130	Other Certified Staff Member	$ 112,500	$ 114,778	$ 186,813	$ 237,895	$ 242,356	See Staffing Plan; ESE/Gifted Average Teacher Salary $45,000; 1.875% Annual Raise;
5200	140	Substitute Teachers	$ 2,000	$ 2,000	$ 3,200	$ 4,000	$ 4,000	8 days / teacher / year at $100 / day
5200	210	Retirement	$ 2,700	$ 2,751	$ 5,604	$ 7,137	$ 7,271	3% of salaries
5200	220	FICA	$ 8,606	$ 8,781	$ 14,291	$ 18,199	$ 18,540	7.65% of salaries
5200	230	Group Insurance	$ 7,200	$ 7,335	$ 14,945	$ 19,032	$ 19,388	8% of salaries
5200	240	Worker's Compensation	$ 1,406	$ 1,435	$ 2,335	$ 2,974	$ 3,029	1.25% of salaries
5200	250	Unemployment Compensation	$ 567	$ 567	$ 756	$ 945	$ 945	2.7% on first $7,000 / employee
5200	310	Professional and Technical Services	$ 11,500	$ 22,725	$ 35,193	$ 45,848	$ 56,193	$500 / ESE student w/ Disabilities / year
5200	510	Supplies	$ 345	$ 682	$ 1,056	$ 1,375	$ 1,686	$15 / student / year
5200	750	Other Personnel Services	$ 1,406	$ 1,435	$ 2,335	$ 2,974	$ 3,029	1.25% of salaries (payroll fees)
		5200 Sub Total	**$ 148,231**	**$ 162,487**	**$ 266,530**	**$ 340,379**	**$ 356,437**	
		Function 6100 - Pupil Services						
6100	130	Other Certified Staff Member	$ 50,000	$ 101,875	$ 103,785	$ 105,731	$ 107,714	See Staffing Plan; School Counselor Salary $50,000; 1.875% Annual Raise; Startup: 3 mo;
6100	160	Other Support Personnel	$ -	$ 48,558	$ 49,286	$ 50,025	$ 50,776	See Staffing Plan; School Nurse: $23/hr 40hr/wk 52wk/yr; 1.5% Annual Raise;
6100	210	Retirement	$ 1,500	$ 4,513	$ 4,592	$ 4,673	$ 4,755	3% of salaries
6100	220	FICA	$ 3,825	$ 11,508	$ 11,710	$ 11,915	$ 12,124	7.65% of salaries
6100	230	Group Insurance	$ 4,000	$ 12,035	$ 12,246	$ 12,461	$ 12,679	8% of salaries
6100	240	Worker's Compensation	$ 625	$ 1,880	$ 1,913	$ 1,947	$ 1,981	1.25% of salaries
6100	250	Unemployment Compensation	$ 189	$ 567	$ 567	$ 567	$ 567	2.7% on first $7,000 / employee
6100	510	Supplies	$ 1,284	$ 2,291	$ 3,428	$ 4,451	$ 5,382	$6 / student / year
6100	641	Furniture, Fixtures-Capitalized	$ 152	$ 3,152	$ 459	$ 618	$ 468	$1,500 / new staff + $150 /returning staff
6100	750	Other Personnel Services	$ 625	$ 1,880	$ 1,913	$ 1,947	$ 1,981	1.25% of salaries (payroll fees)
		6100 Sub Total	**$ 62,200**	**$ 188,258**	**$ 189,899**	**$ 194,335**	**$ 198,427**	
		Function 6200 - Instructional Media Services						
6200	510	Supplies	$ 963	$ 1,718	$ 2,571	$ 3,338	$ 4,037	$4.50 / student / year
		6200 Sub Total	**$ 963**	**$ 1,718**	**$ 2,571**	**$ 3,338**	**$ 4,037**	
		Function 6300 - Instructional/Curriculum Development						
6300	130	Other Certified Staff Member	$ 48,000	$ 48,900	$ 49,817	$ 101,502	$ 103,405	See Staffing Plan; Curriculum/Intervention Specialist Average Salary $48,000; 1.875% Annual Raise;
6300	210	Retirement	$ 1,440	$ 1,467	$ 1,495	$ 3,045	$ 3,102	3% of salaries
6300	220	FICA	$ 3,672	$ 3,741	$ 3,811	$ 7,765	$ 7,910	7.65% of salaries
6300	230	Group Insurance	$ 3,840	$ 3,912	$ 3,985	$ 8,120	$ 8,272	8% of salaries
6300	240	Worker's Compensation	$ 600	$ 611	$ 623	$ 1,269	$ 1,293	1.25% of salaries
6300	250	Unemployment Compensation	$ 189	$ 189	$ 189	$ 378	$ 378	2.7% on first $7,000 / employee
6300	510	Supplies	$ 1,284	$ 2,291	$ 3,428	$ 4,451	$ 5,382	$6 / student / year
6300	641	Furniture, Fixtures-Capitalized	$ 1,515	$ 152	$ 153	$ 1,700	$ 312	$1,500 / new staff + $150 /returning staff
6300	750	Other Personnel Services	$ 600	$ 611	$ 623	$ 1,269	$ 1,293	1.25% of salaries (payroll fees)
		6300 Sub Total	**$ 61,140**	**$ 61,874**	**$ 64,123**	**$ 129,498**	**$ 131,347**	
		Function 6400 - Instructional Staff Training						
6400	310	Professional and Technical Services	$ 27,188	$ 44,503	$ 68,857	$ 87,898	$ 103,410	$1,875 / teacher and administrator / year
6400	330	Travel	$ 9,063	$ 14,834	$ 22,952	$ 29,299	$ 34,470	$625 / teacher and administrator / year
6400	510	Supplies	$ 500	$ 510	$ 520	$ 531	$ 541	$500 / year
		6400 Sub Total	**$ 36,750**	**$ 59,848**	**$ 92,329**	**$ 117,727**	**$ 138,421**	

Func	Obj	Description	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates	214 (of est. 214)	378 (of est. 378)	560 (of est. 560)	720 (of est. 720)	862 (of est. 862)	
Function 6500 - Instructional-Related Technology								
6500	310	Professional and Technical Services	$ 12,000	$ 12,120	$ 12,241	$ 12,364	$ 12,487	$12,000 / year
		6500 Sub Total	**$ 12,000**	**$ 12,120**	**$ 12,241**	**$ 12,364**	**$ 12,487**	
Function 7100 - Board								
7100	310	Professional and Technical Services	$ 2,500	$ 2,550	$ 3,101	$ 2,653	$ 2,706	Startup: $5,500; Year 1 - Year 5: $2,500 / year;
7100	320	Insurance and Bond Premiums	$ 7,490	$ 13,362	$ 19,994	$ 25,964	$ 31,395	$35 /student / year
7100	330	Travel	$ 2,000	$ 2,020	$ 2,040	$ 2,061	$ 2,081	Startup: $2,000; Year 1 - Year 5: $2,000 / year
		7100 Sub Total	**$ 11,990**	**$ 17,932**	**$ 25,135**	**$ 30,677**	**$ 36,182**	
Function 7200 - General / District Administration								
7200	730	Dues and Fees	$ 75,737	$ 87,635	$ 88,287	$ 89,211	$ 90,018	5% of FEFP at 250 FTE
		7200 Sub Total	**$ 75,737**	**$ 87,635**	**$ 88,287**	**$ 89,211**	**$ 90,018**	
Function 7300 - School Administration								
7300	110	Administrator Salaries	$ 95,000	$ 96,781	$ 171,246	$ 174,456	$ 177,727	See Staffing Plan; Principal $95,000 + AP $70,000; 1.875% Annual Raise; Startup: Principal 6 mo.;
7300	160	Other Support Personnel	$ 56,160	$ 57,002	$ 57,857	$ 58,725	$ 59,606	See Staffing Plan; Office Manager $15/hr 40hr/wk 52wk/yr + Data Clerk $12/hr 40hr/wk 52wk/yr; 1.5% Annual Raise; Startup: OM 12 weeks;
7300	210	Retirement	$ 4,535	$ 4,614	$ 6,873	$ 6,995	$ 7,120	3% of salaries
7300	220	FICA	$ 11,564	$ 11,764	$ 17,526	$ 17,838	$ 18,156	7.65% of salaries
7300	230	Group Insurance	$ 12,093	$ 12,303	$ 18,328	$ 18,655	$ 18,987	8% of salaries
7300	240	Worker's Compensation	$ 1,890	$ 1,922	$ 2,864	$ 2,915	$ 2,967	1.25% of salaries
7300	250	Unemployment Compensation	$ 567	$ 567	$ 756	$ 756	$ 756	2.7% on first $7,000 / employee
7300	310	Professional and Technical Services	$ 642	$ 1,145	$ 1,714	$ 2,225	$ 2,691	$3 / student / year
7300	360	Rentals	$ 4,708	$ 8,399	$ 12,568	$ 16,320	$ 19,734	$22 / student / year
7300	370	Communications	$ 856	$ 1,527	$ 2,285	$ 2,967	$ 3,588	$4 / student / year
7300	390	Other Purchased Services	$ 2,140	$ 3,818	$ 5,713	$ 7,418	$ 8,970	Startup: $15,000; Year 1 - Year 5: $10 / student / year;
7300	510	Supplies	$ 4,708	$ 8,399	$ 12,568	$ 16,320	$ 19,734	$22 / student / year
7300	641	Furniture, Fixtures-Capitalized	$ 1,500	$ 455	$ 1,989	$ 618	$ 624	$1,500 / new staff + $150 / returning staff
7300	644	Computer Hardware (Non Capitalized)	$ 1,706	$ 1,527	$ 3,169	$ 2,967	$ 3,588	$850 / new staff + $4 / student / year
7300	690	Computer Software	$ 3,000	$ 303	$ 1,326	$ 412	$ 416	$1,000 / new staff + $100 / returning staff
7300	730	Dues and Fees	$ 856	$ 1,527	$ 2,285	$ 2,967	$ 3,588	$4 / student / year
7300	750	Other Personnel Services	$ 1,890	$ 1,922	$ 2,864	$ 2,915	$ 2,967	1.25% of salaries (payroll fees)
		7300 Sub Total	**$ 203,813**	**$ 213,976**	**$ 321,931**	**$ 335,471**	**$ 351,219**	
Function 7500 - Fiscal Services								
7500	310	Professional and Technical Services	$ 41,731	$ 79,249	$ 111,983	$ 138,934	$ 154,550	Backoffice: Year 1: 2.9% net FEFP, Year 2: 2.8%, Year 3: 2.7%, Year 4: 2.6%, Year 5: 2.4% + Auditor: $7,500 / year beginning Year 2
7500	720	Interest Payment / Debt Service	$ 18,900	$ 30,150	$ 31,650	$ 31,650	$ 31,650	Year 1 -5: 3% interest only payments on startup and operating loans;
		7500 Sub Total	**$ 60,631**	**$ 109,399**	**$ 143,633**	**$ 170,584**	**$ 186,200**	
Function 7600 - Food Services								
7600	160	Other Support Personnel	$ 11,880	$ 24,116	$ 24,478	$ 24,845	$ 37,827	See Staffing Plan; Food Service Workers: $11/hr 30hr/wk 36wk/yr; 1.5% Annual Raise;
7600	210	Retirement	$ 356	$ 723	$ 734	$ 745	$ 1,135	3% of salaries
7600	220	FICA	$ 909	$ 1,845	$ 1,873	$ 1,901	$ 2,894	7.65% of salaries
7600	230	Group Insurance	$ 950	$ 1,929	$ 1,958	$ 1,988	$ 3,026	8% of salaries
7600	240	Worker's Compensation	$ 149	$ 301	$ 306	$ 311	$ 473	1.25% of salaries
7600	250	Unemployment Compensation	$ 189	$ 378	$ 378	$ 378	$ 567	2.7% on first $7,000 / employee
7600	570	Food	$ 49,680	$ 88,128	$ 130,896	$ 168,912	$ 202,176	$2.40 / student meal at 180 days; FRL rates at 77%, assumes 75% FRL student participation and 25% other participation; (52% total student participation); Yr 1: 115 fte, Yr 2: 204 fte, Yr 3: 303 fte, Yr 4: 391 fte, Yr 5: 468 fte:
7600	641	Furniture, Fixtures-Capitalized	$ 5,000	$ 1,000	$ 1,010	$ 1,020	$ 1,030	Year 1: $5,000, Year 2 - 5: $1,000 per year;
7600	642	Furniture, Fixtures (Non Capitalized)	$ 1,000	$ 500	$ 505	$ 510	$ 515	Year 1: $1,000, Year 2 - 5: $500 per year;
7600	750	Other Personnel Services	$ 149	$ 301	$ 306	$ 311	$ 473	1.25% of salaries (payroll fees)
		7600 Sub Total	**$ 70,262**	**$ 119,223**	**$ 162,444**	**$ 200,920**	**$ 250,116**	

Func	Obj	Description	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates	214 (of est. 214)	378 (of est. 378)	560 (of est. 560)	720 (of est. 720)	862 (of est. 862)	
Function 7800 - Pupil Transportation								
7800	390	Other Purchased Services	$ 129,600	$ 174,528	$ 264,410	$ 356,072	$ 404,587	48% transportation participation; 48 students / bus at $240 / bus / day at 180 days per year; Buses / year: Year 1: 3, Year 2: 4, Year 3: 6, Year 4: 8, Year 5: 9;
		7800 Sub Total	**$ 129,600**	**$ 174,528**	**$ 264,410**	**$ 356,072**	**$ 404,587**	
Function 7900 - Operation of Plant								
7900	160	Other Support Personnel	$ 24,960	$ 50,669	$ 77,143	$ 78,300	$ 79,475	See Staffing Plan; Custodian (Day Porter): $12/hr 40hr/wk 52wk/yr; 1.5% Annual Raise;
7900	210	Retirement	$ 749	$ 1,520	$ 2,314	$ 2,349	$ 2,384	3% of salaries
7900	220	FICA	$ 1,909	$ 3,876	$ 5,901	$ 5,990	$ 6,080	7.65% of salaries
7900	230	Group Insurance	$ 1,997	$ 4,054	$ 6,171	$ 6,264	$ 6,358	8% of salaries
7900	240	Worker's Compensation	$ 312	$ 633	$ 964	$ 979	$ 993	1.25% of salaries
7900	250	Unemployment Compensation	$ 189	$ 378	$ 567	$ 567	$ 567	2.7% on first $7,000 / employee
7900	310	Professional and Technical Services	$ 60,000	$ 60,600	$ 61,206	$ 61,818	$ 62,436	SRO at $60,000 per year;
7900	320	Insurance and Bond Premiums	$ 12,038	$ 21,475	$ 32,133	$ 41,727	$ 50,456	$.75/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	350	Repairs and Maintenance	$ 25,000	$ 25,250	$ 25,503	$ 25,758	$ 26,015	Year 1-5 $25,000 / year;
7900	360	Rentals	$ 106,032	$ 185,507	$ 276,869	$ 462,471	$ 744,915	Year 1 - 3 at 7% of FEFP revenue, Year 4 at 9% of FEFP, and Year 5 at 12% of FEFP;
7900	370	Communications	$ 18,000	$ 18,180	$ 18,362	$ 18,545	$ 18,731	Year 1-5: $1,500 / mo; Startup: 2 months at year 1 cost;
7900	380	Public Utilities	$ 12,038	$ 21,475	$ 32,133	$ 41,727	$ 50,456	$.75/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	390	Other Purchased Services	$ 31,620	$ 53,742	$ 78,731	$ 101,237	$ 121,709	Pest Control, Fire Monitoring etc: $85 / classroom (Classrooms: Year 1: 11, Year 2: 19, Year 3: 28, Year 4: 36, Year 5: 43); HVAC: $1,000 / year; Inspections: $2,400 / year; Landscape: $0.75 / SF; Contract Custodial: $0.95/SF; (Square Footage: Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF); Startup: 2 months at year 1 cost;
7900	430	Electricity	$ 20,063	$ 35,792	$ 53,555	$ 69,545	$ 84,094	$1.25/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	510	Supplies	$ 5,350	$ 9,545	$ 14,281	$ 18,545	$ 22,425	$25 / student / year; Startup: 2 months at year 1 cost;
7900	750	Other Personnel Services	$ 312	$ 633	$ 964	$ 979	$ 993	1.25% of salaries (payroll fees)
		7900 Sub Total	**$ 320,567**	**$ 493,329**	**$ 686,799**	**$ 936,803**	**$ 1,278,088**	
		Reserve Fund	$ 45,442	$ 79,503	$ 118,658	$ 154,157	$ 186,229	3% Net FEFP
		Total Expenses	**$ 2,055,409**	**$ 3,096,501**	**$ 4,411,355**	**$ 5,621,665**	**$ 6,666,318**	

Totals

Revenue	**$ 2,080,960**	**$ 3,142,870**	**$ 4,461,641**	**$ 5,726,309**	**$ 6,911,284**
Expenses	**$ 2,055,409**	**$ 3,096,501**	**$ 4,411,355**	**$ 5,621,665**	**$ 6,666,318**
Net Revenue	**$ 25,551**	**$ 46,369**	**$ 50,286**	**$ 104,644**	**$ 244,967**
Cash Balance	**$ 31,845**	**$ 78,215**	**$ 128,501**	**$ 233,145**	**$ 478,112**

Ina A. Colen Academy K-8

Five Year Staffing Projections

	Year 1	Year 2	Year 3	Year 4	Year 5
Principal	1	1	1	1	1
Assistant Principal	0	0	1	1	1
Classroom Teachers K-5	9	14	19	24	29
Classroom Teachers 6-8	2	5	9	12	14
ESE Teacher/Specialist	2	2	3	4	4
Gifted Teacher	0.5	0.5	1	1	1
ELL Coordinator/Specialist	0	1	2	2.5	3
School Counselor	1	2	2	2	2
Curriculum/Intervention Specialist	1	1	1	2	2
Office Manager	1	1	1	1	1
Registrar/Data Entry	1	1	1	1	1
School Nurse	0	1	1	1	1
Custodian (Day Porter)	1	2	3	3	3
Food Service Workers	1	2	2	2	3
Total Employees	**20.5**	**33.5**	**47**	**57.5**	**66**

Ina A. Colen Academy K-8
Year 1 Budget Projections
Year 1 Budget - Marion County

Func	Obj	Description	Pln Yr Total	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June
Income Estimates															
FEFP Calculations															
3310		FEFP - Base Funding	$ 936,367	$ 78,031	$ 78,031	$ 78,031	$ 78,031	$ 78,031	$ 78,031	$ 78,031	$ 78,031	$ 78,031	$ 78,031	$ 78,031	$ 78,031
3310		FEFP - ESE Guarantee	$ 34,229	$ 2,852	$ 2,852	$ 2,852	$ 2,852	$ 2,852	$ 2,852	$ 2,852	$ 2,852	$ 2,852	$ 2,852	$ 2,852	$ 2,852
3310		FEFP - Supplemental Academic Instruction	$ 65,415	$ 5,451	$ 5,451	$ 5,451	$ 5,451	$ 5,451	$ 5,451	$ 5,451	$ 5,451	$ 5,451	$ 5,451	$ 5,451	$ 5,451
3310		FEFP - Discretionary Millage Compression	$ 42,890	$ 3,574	$ 3,574	$ 3,574	$ 3,574	$ 3,574	$ 3,574	$ 3,574	$ 3,574	$ 3,574	$ 3,574	$ 3,574	$ 3,574
3310		FEFP - Digital Classroom Allocation	$ 1,403	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117
3310		FEFP - Safe Schools Allocations	$ 13,667	$ 1,139	$ 1,139	$ 1,139	$ 1,139	$ 1,139	$ 1,139	$ 1,139	$ 1,139	$ 1,139	$ 1,139	$ 1,139	$ 1,139
3310		FEFP - Instructional Materials Allocation	$ 16,232	$ 1,353	$ 1,353	$ 1,353	$ 1,353	$ 1,353	$ 1,353	$ 1,353	$ 1,353	$ 1,353	$ 1,353	$ 1,353	$ 1,353
3310		FEFP - Mental Health Assistance Allocation	$ 5,659	$ 472	$ 472	$ 472	$ 472	$ 472	$ 472	$ 472	$ 472	$ 472	$ 472	$ 472	$ 472
3310		FEFP - Total Funds Compression Allocation	$ 17,225	$ 1,435	$ 1,435	$ 1,435	$ 1,435	$ 1,435	$ 1,435	$ 1,435	$ 1,435	$ 1,435	$ 1,435	$ 1,435	$ 1,435
3310		FEFP - Declining Enrollment	$ 801	$ 67	$ 67	$ 67	$ 67	$ 67	$ 67	$ 67	$ 67	$ 67	$ 67	$ 67	$ 67
3310		FEFP - Reading Allocation	$ 9,081	$ 757	$ 757	$ 757	$ 757	$ 757	$ 757	$ 757	$ 757	$ 757	$ 757	$ 757	$ 757
3310		FEFP - Discretionary Local Effort	$ 74,432	$ 6,203	$ 6,203	$ 6,203	$ 6,203	$ 6,203	$ 6,203	$ 6,203	$ 6,203	$ 6,203	$ 6,203	$ 6,203	$ 6,203
3310		FEFP - Discretionary Lottery	$ 690	$ 58	$ 58	$ 58	$ 58	$ 58	$ 58	$ 58	$ 58	$ 58	$ 58	$ 58	$ 58
3355		FEFP - Class Size Reductions	$ 253,694	$ 21,141	$ 21,141	$ 21,141	$ 21,141	$ 21,141	$ 21,141	$ 21,141	$ 21,141	$ 21,141	$ 21,141	$ 21,141	$ 21,141
3492		Transportation (All Riders)	$ 42,951	$ 3,579	$ 3,579	$ 3,579	$ 3,579	$ 3,579	$ 3,579	$ 3,579	$ 3,579	$ 3,579	$ 3,579	$ 3,579	$ 3,579
Other Income															
3261		School Lunch Reimbursements	$ 60,176	$ -	$ 3,343	$ 6,686	$ 6,686	$ 6,686	$ 6,686	$ 6,686	$ 6,686	$ 6,686	$ 6,686	$ 3,343	$ -
3451		School Lunch Collections	$ 6,048	$ -	$ 336	$ 672	$ 672	$ 672	$ 672	$ 672	$ 672	$ 672	$ 672	$ 336	$ -
3720		Financing / Loan Proceeds	$ 500,000	$ 500,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
		Total Income	**$ 2,080,960**	**$ 626,228**	**$ 129,907**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 129,907**	**$ 126,228**
Expense Estimates															
Function 5100 - Basic Instruction															
5100	120	Classroom Teacher Salaries	$ 495,000	$ -	$ 20,625	$ 41,250	$ 41,250	$ 41,250	$ 41,250	$ 41,250	$ 41,250	$ 41,250	$ 41,250	$ 41,250	$ 103,125
5100	140	Substitute Teachers	$ 8,800	$ -	$ 489	$ 978	$ 978	$ 978	$ 978	$ 978	$ 978	$ 978	$ 978	$ 489	$ -
5100	210	Retirement	$ 14,850	$ -	$ 619	$ 1,238	$ 1,238	$ 1,238	$ 1,238	$ 1,238	$ 1,238	$ 1,238	$ 1,238	$ 1,238	$ 3,094
5100	220	FICA	$ 37,868	$ -	$ 1,578	$ 3,156	$ 3,156	$ 3,156	$ 3,156	$ 3,156	$ 3,156	$ 3,156	$ 3,156	$ 3,156	$ 7,889
5100	230	Group Insurance	$ 39,600	$ -	$ 3,300	$ 3,300	$ 3,300	$ 3,300	$ 3,300	$ 3,300	$ 3,300	$ 3,300	$ 3,300	$ 3,300	$ 6,600
5100	240	Worker's Compensation	$ 6,188	$ -	$ 258	$ 516	$ 516	$ 516	$ 516	$ 516	$ 516	$ 516	$ 516	$ 516	$ 1,289
5100	250	Unemployment Compensation	$ 2,079	$ -	$ 574	$ 1,147	$ 358	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
5100	360	Rentals	$ 21,400	$ 5,350	$ 3,210	$ 3,210	$ 3,210	$ 3,210	$ 3,210	$ -	$ -	$ -	$ -	$ -	$ -
5100	510	Supplies	$ 10,700	$ 2,675	$ 730	$ 730	$ 730	$ 730	$ 730	$ 730	$ 730	$ 730	$ 730	$ 730	$ 730
5100	520	Textbooks	$ 55,105	$ 13,776	$ 8,266	$ 8,266	$ 8,266	$ 8,266	$ 8,266	$ -	$ -	$ -	$ -	$ -	$ -
5100	641	Furniture, Fixtures-Capitalized	$ 70,200	$ 17,550	$ 10,530	$ 10,530	$ 10,530	$ 10,530	$ 10,530	$ -	$ -	$ -	$ -	$ -	$ -
5100	644	Computer Hardware (Non Capitalized)	$ 48,000	$ 12,000	$ 7,200	$ 7,200	$ 7,200	$ 7,200	$ 7,200	$ -	$ -	$ -	$ -	$ -	$ -
5100	730	Dues and Fees	$ 107	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9
5100	750	Other Personnel Services	$ 6,188	$ -	$ 258	$ 516	$ 516	$ 516	$ 516	$ 516	$ 516	$ 516	$ 516	$ 516	$ 1,289
		5100 Sub Total	**$ 816,084**	**$ 51,360**	**$ 57,644**	**$ 82,044**	**$ 81,255**	**$ 80,896**	**$ 80,896**	**$ 51,691**	**$ 51,691**	**$ 51,691**	**$ 51,691**	**$ 51,202**	**$ 124,024**
Function 5200 - Exceptional Education															
5200	130	Other Certified Staff Member	$ 112,500	$ -	$ 4,688	$ 9,375	$ 9,375	$ 9,375	$ 9,375	$ 9,375	$ 9,375	$ 9,375	$ 9,375	$ 9,375	$ 23,438
5200	140	Substitute Teachers	$ 2,000	$ -	$ 111	$ 222	$ 222	$ 222	$ 222	$ 222	$ 222	$ 222	$ 222	$ 111	$ -
5200	210	Retirement	$ 2,700	$ -	$ 113	$ 225	$ 225	$ 225	$ 225	$ 225	$ 225	$ 225	$ 225	$ 225	$ 563
5200	220	FICA	$ 8,606	$ -	$ 359	$ 717	$ 717	$ 717	$ 717	$ 717	$ 717	$ 717	$ 717	$ 717	$ 1,793
5200	230	Group Insurance	$ 7,200	$ -	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 1,200
5200	240	Worker's Compensation	$ 1,406	$ -	$ 59	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 293
5200	250	Unemployment Compensation	$ 567	$ -	$ 130	$ 259	$ 178	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
5200	310	Professional and Technical Services	$ 11,500	$ -	$ 639	$ 1,278	$ 1,278	$ 1,278	$ 1,278	$ 1,278	$ 1,278	$ 1,278	$ 1,278	$ 639	$ -
5200	510	Supplies	$ 345	$ 86	$ 24	$ 24	$ 24	$ 24	$ 24	$ 24	$ 24	$ 24	$ 24	$ 24	$ 24
5200	750	Other Personnel Services	$ 1,406	$ -	$ 59	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 117	$ 293
		5200 Sub Total	**$ 148,231**	**$ 86**	**$ 6,779**	**$ 12,934**	**$ 12,853**	**$ 12,675**	**$ 12,675**	**$ 12,675**	**$ 12,675**	**$ 12,675**	**$ 12,675**	**$ 11,925**	**$ 27,602**

Func	Obj	Description	Pln Yr Total	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June
Function 6100 - Pupil Services															
6100	130	Other Certified Staff Member	$ 50,000	$ 4,167	$ 4,167	$ 4,167	$ 4,167	$ 4,167	$ 4,167	$ 4,167	$ 4,167	$ 4,167	$ 4,167	$ 4,167	$ 4,167
6100	210	Retirement	$ 1,500	$ 125	$ 125	$ 125	$ 125	$ 125	$ 125	$ 125	$ 125	$ 125	$ 125	$ 125	$ 125
6100	220	FICA	$ 3,825	$ 319	$ 319	$ 319	$ 319	$ 319	$ 319	$ 319	$ 319	$ 319	$ 319	$ 319	$ 319
6100	230	Group Insurance	$ 4,000	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333
6100	240	Worker's Compensation	$ 625	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52
6100	250	Unemployment Compensation	$ 189	$ 116	$ 73	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
6100	510	Supplies	$ 1,284	$ 321	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88
6100	641	Furniture, Fixtures-Capitalized	$ 152	$ 38	$ 23	$ 23	$ 23	$ 23	$ 23	$ -	$ -	$ -	$ -	$ -	$ -
6100	750	Other Personnel Services	$ 625	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52	$ 52
		6100 Sub Total	**$ 62,200**	**$ 5,523**	**$ 5,231**	**$ 5,158**	**$ 5,158**	**$ 5,158**	**$ 5,158**	**$ 5,135**	**$ 5,135**	**$ 5,135**	**$ 5,135**	**$ 5,135**	**$ 5,135**
Function 6200 - Instructional Media Services															
6200	510	Supplies	$ 963	$ 241	$ 66	$ 66	$ 66	$ 66	$ 66	$ 66	$ 66	$ 66	$ 66	$ 66	$ 66
		6200 Sub Total	**$ 963**	**$ 241**	**$ 66**	**$ 66**	**$ 66**	**$ 66**	**$ 66**	**$ 66**	**$ 66**	**$ 66**	**$ 66**	**$ 66**	**$ 66**
Function 6300 - Instructional/Curriculum Development															
6300	130	Other Certified Staff Member	$ 48,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000
6300	210	Retirement	$ 1,440	$ 120	$ 120	$ 120	$ 120	$ 120	$ 120	$ 120	$ 120	$ 120	$ 120	$ 120	$ 120
6300	220	FICA	$ 3,672	$ 306	$ 306	$ 306	$ 306	$ 306	$ 306	$ 306	$ 306	$ 306	$ 306	$ 306	$ 306
6300	230	Group Insurance	$ 3,840	$ 320	$ 320	$ 320	$ 320	$ 320	$ 320	$ 320	$ 320	$ 320	$ 320	$ 320	$ 320
6300	240	Worker's Compensation	$ 600	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50
6300	250	Unemployment Compensation	$ 189	$ 111	$ 78	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
6300	510	Supplies	$ 1,284	$ 321	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88	$ 88
6300	641	Furniture, Fixtures-Capitalized	$ 1,515	$ 379	$ 227	$ 227	$ 227	$ 227	$ 227	$ -	$ -	$ -	$ -	$ -	$ -
6300	750	Other Personnel Services	$ 600	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50	$ 50
		6300 Sub Total	**$ 61,140**	**$ 5,657**	**$ 5,239**	**$ 5,161**	**$ 5,161**	**$ 5,161**	**$ 5,161**	**$ 4,934**	**$ 4,934**	**$ 4,934**	**$ 4,934**	**$ 4,934**	**$ 4,934**
Function 6400 - Instructional Staff Training															
6400	310	Professional and Technical Services	$ 27,188	$ 13,594	$ -	$ -	$ -	$ -	$ -	$ 13,594	$ -	$ -	$ -	$ -	$ -
6400	330	Travel	$ 9,063	$ 4,531	$ -	$ -	$ -	$ -	$ -	$ 4,531	$ -	$ -	$ -	$ -	$ -
6400	510	Supplies	$ 500	$ 125	$ 34	$ 34	$ 34	$ 34	$ 34	$ 34	$ 34	$ 34	$ 34	$ 34	$ 34
		6400 Sub Total	**$ 36,750**	**$ 18,250**	**$ 34**	**$ 34**	**$ 34**	**$ 34**	**$ 34**	**$ 18,159**	**$ 34**	**$ 34**	**$ 34**	**$ 34**	**$ 34**
Function 6500 - Instructional-Related Technology															
6500	310	Professional and Technical Services	$ 12,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000
		6500 Sub Total	**$ 12,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**	**$ 1,000**
Function 7100 - Board															
7100	310	Professional and Technical Services	$ 2,500	$ 208	$ 208	$ 208	$ 208	$ 208	$ 208	$ 208	$ 208	$ 208	$ 208	$ 208	$ 208
7100	320	Insurance and Bond Premiums	$ 7,490	$ 1,873	$ 624	$ 624	$ 624	$ 624	$ 624	$ 624	$ 624	$ 624	$ 624	$ -	$ -
7100	330	Travel	$ 2,000	$ 1,000	$ -	$ -	$ -	$ -	$ -	$ 1,000	$ -	$ -	$ -	$ -	$ -
		7100 Sub Total	**$ 11,990**	**$ 3,081**	**$ 833**	**$ 833**	**$ 833**	**$ 833**	**$ 833**	**$ 1,833**	**$ 833**	**$ 833**	**$ 833**	**$ 208**	**$ 208**
Function 7200 - General / District Administration															
7200	730	Dues and Fees	$ 75,737	$ 6,311	$ 6,311	$ 6,311	$ 6,311	$ 6,311	$ 6,311	$ 6,311	$ 6,311	$ 6,311	$ 6,311	$ 6,311	$ 6,311
		7200 Sub Total	**$ 75,737**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**	**$ 6,311**
Function 7300 - School Administration															
7300	110	Administrator Salaries	$ 95,000	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917
7300	160	Other Support Personnel	$ 56,160	$ 4,680	$ 4,680	$ 4,680	$ 4,680	$ 4,680	$ 4,680	$ 4,680	$ 4,680	$ 4,680	$ 4,680	$ 4,680	$ 4,680
7300	210	Retirement	$ 4,535	$ 378	$ 378	$ 378	$ 378	$ 378	$ 378	$ 378	$ 378	$ 378	$ 378	$ 378	$ 378
7300	220	FICA	$ 11,564	$ 964	$ 964	$ 964	$ 964	$ 964	$ 964	$ 964	$ 964	$ 964	$ 964	$ 964	$ 964
7300	230	Group Insurance	$ 12,093	$ 1,008	$ 1,008	$ 1,008	$ 1,008	$ 1,008	$ 1,008	$ 1,008	$ 1,008	$ 1,008	$ 1,008	$ 1,008	$ 1,008
7300	240	Worker's Compensation	$ 1,890	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157
7300	250	Unemployment Compensation	$ 567	$ 340	$ 126	$ 101	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
7300	310	Professional and Technical Services	$ 642	$ 642	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
7300	360	Rentals	$ 4,708	$ 392	$ 392	$ 392	$ 392	$ 392	$ 392	$ 392	$ 392	$ 392	$ 392	$ 392	$ 392
7300	370	Communications	$ 856	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71
7300	390	Other Purchased Services	$ 2,140	$ 178	$ 178	$ 178	$ 178	$ 178	$ 178	$ 178	$ 178	$ 178	$ 178	$ 178	$ 178
7300	510	Supplies	$ 4,708	$ 1,177	$ 321	$ 321	$ 321	$ 321	$ 321	$ 321	$ 321	$ 321	$ 321	$ 321	$ 321
7300	641	Furniture, Fixtures-Capitalized	$ 1,500	$ 375	$ 225	$ 225	$ 225	$ 225	$ 225	$ -	$ -	$ -	$ -	$ -	$ -
7300	644	Computer Hardware (Non Capitalized)	$ 1,706	$ 427	$ 256	$ 256	$ 256	$ 256	$ 256	$ -	$ -	$ -	$ -	$ -	$ -
7300	690	Computer Software	$ 3,000	$ 750	$ 450	$ 450	$ 450	$ 450	$ 450	$ -	$ -	$ -	$ -	$ -	$ -
7300	730	Dues and Fees	$ 856	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71	$ 71
7300	750	Other Personnel Services	$ 1,890	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157	$ 157
		7300 Sub Total	**$ 203,813**	**$ 19,685**	**$ 17,352**	**$ 17,327**	**$ 17,226**	**$ 17,226**	**$ 17,226**	**$ 16,295**	**$ 16,295**	**$ 16,295**	**$ 16,295**	**$ 16,295**	**$ 16,295**

Func	Obj	Description	Pln Yr Total	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June
Function 7500 - Fiscal Services															
7500	310	Professional and Technical Services	$ 41,731	$ 3,478	$ 3,478	$ 3,478	$ 3,478	$ 3,478	$ 3,478	$ 3,478	$ 3,478	$ 3,478	$ 3,478	$ 3,478	$ 3,478
7500	720	Interest Payment / Debt Service	$ 18,900	$ 1,575	$ 1,575	$ 1,575	$ 1,575	$ 1,575	$ 1,575	$ 1,575	$ 1,575	$ 1,575	$ 1,575	$ 1,575	$ 1,575
		7500 Sub Total	**$ 60,631**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**	**$ 5,053**
Function 7600 - Food Services															
7600	160	Other Support Personnel	$ 11,880	$ -	$ 660	$ 1,320	$ 1,320	$ 1,320	$ 1,320	$ 1,320	$ 1,320	$ 1,320	$ 1,320	$ 660	$ -
7600	210	Retirement	$ 356	$ -	$ 20	$ 40	$ 40	$ 40	$ 40	$ 40	$ 40	$ 40	$ 40	$ 20	$ -
7600	220	FICA	$ 909	$ -	$ 50	$ 101	$ 101	$ 101	$ 101	$ 101	$ 101	$ 101	$ 101	$ 50	$ -
7600	230	Group Insurance	$ 950	$ 79	$ 79	$ 79	$ 79	$ 79	$ 79	$ 79	$ 79	$ 79	$ 79	$ 79	$ 79
7600	240	Worker's Compensation	$ 149	$ -	$ 8	$ 17	$ 17	$ 17	$ 17	$ 17	$ 17	$ 17	$ 17	$ 8	$ -
7600	250	Unemployment Compensation	$ 189	$ -	$ 18	$ 101	$ 71	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
7600	570	Food	$ 49,680	$ -	$ 2,760	$ 5,520	$ 5,520	$ 5,520	$ 5,520	$ 5,520	$ 5,520	$ 5,520	$ 5,520	$ 2,760	$ -
7600	641	Furniture, Fixtures-Capitalized	$ 5,000	$ 1,250	$ 750	$ 750	$ 750	$ 750	$ 750	$ -	$ -	$ -	$ -	$ -	$ -
7600	642	Furniture, Fixtures (Non Capitalized)	$ 1,000	$ 250	$ 150	$ 150	$ 150	$ 150	$ 150	$ -	$ -	$ -	$ -	$ -	$ -
7600	750	Other Personnel Services	$ 149	$ -	$ 8	$ 17	$ 17	$ 17	$ 17	$ 17	$ 17	$ 17	$ 17	$ 8	$ -
		7600 Sub Total	**$ 70,262**	**$ 1,579**	**$ 4,504**	**$ 8,093**	**$ 8,063**	**$ 7,993**	**$ 7,993**	**$ 7,093**	**$ 7,093**	**$ 7,093**	**$ 7,093**	**$ 3,586**	**$ 79**
Function 7800 - Pupil Transportation															
7800	390	Other Purchased Services	$ 129,600	$ -	$ 12,960	$ 12,960	$ 12,960	$ 12,960	$ 12,960	$ 12,960	$ 12,960	$ 12,960	$ 12,960	$ 12,960	$ -
		7800 Sub Total	**$ 129,600**	**$ -**	**$ 12,960**	**$ 12,960**	**$ 12,960**	**$ 12,960**	**$ 12,960**	**$ 12,960**	**$ 12,960**	**$ 12,960**	**$ 12,960**	**$ 12,960**	**$ -**
Function 7900 - Operation of Plant															
7900	160	Other Support Personnel	$ 24,960	$ 2,080	$ 2,080	$ 2,080	$ 2,080	$ 2,080	$ 2,080	$ 2,080	$ 2,080	$ 2,080	$ 2,080	$ 2,080	$ 2,080
7900	210	Retirement	$ 749	$ 62	$ 62	$ 62	$ 62	$ 62	$ 62	$ 62	$ 62	$ 62	$ 62	$ 62	$ 62
7900	220	FICA	$ 1,909	$ 159	$ 159	$ 159	$ 159	$ 159	$ 159	$ 159	$ 159	$ 159	$ 159	$ 159	$ 159
7900	230	Group Insurance	$ 1,997	$ 166	$ 166	$ 166	$ 166	$ 166	$ 166	$ 166	$ 166	$ 166	$ 166	$ 166	$ 166
7900	240	Worker's Compensation	$ 312	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26
7900	250	Unemployment Compensation	$ 189	$ 56	$ 56	$ 56	$ 21	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
7900	310	Professional and Technical Services	$ 60,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000
7900	320	Insurance and Bond Premiums	$ 12,038	$ 3,009	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ -	$ -
7900	350	Repairs and Maintenance	$ 25,000	$ 2,083	$ 2,083	$ 2,083	$ 2,083	$ 2,083	$ 2,083	$ 2,083	$ 2,083	$ 2,083	$ 2,083	$ 2,083	$ 2,083
7900	360	Rentals	$ 106,032	$ 8,836	$ 8,836	$ 8,836	$ 8,836	$ 8,836	$ 8,836	$ 8,836	$ 8,836	$ 8,836	$ 8,836	$ 8,836	$ 8,836
7900	370	Communications	$ 18,000	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500
7900	380	Public Utilities	$ 12,038	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003	$ 1,003
7900	390	Other Purchased Services	$ 31,620	$ 2,635	$ 2,635	$ 2,635	$ 2,635	$ 2,635	$ 2,635	$ 2,635	$ 2,635	$ 2,635	$ 2,635	$ 2,635	$ 2,635
7900	430	Electricity	$ 20,063	$ 1,672	$ 1,672	$ 1,672	$ 1,672	$ 1,672	$ 1,672	$ 1,672	$ 1,672	$ 1,672	$ 1,672	$ 1,672	$ 1,672
7900	510	Supplies	$ 5,350	$ 1,338	$ 365	$ 365	$ 365	$ 365	$ 365	$ 365	$ 365	$ 365	$ 365	$ 365	$ 365
7900	750	Other Personnel Services	$ 312	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26	$ 26
		7900 Sub Total	**$ 320,567**	**$ 29,652**	**$ 26,673**	**$ 26,673**	**$ 26,638**	**$ 26,617**	**$ 26,617**	**$ 26,617**	**$ 26,617**	**$ 26,617**	**$ 26,617**	**$ 25,614**	**$ 25,614**
		Reserve Fund	$ 45,442	$ 3,787	$ 3,787	$ 3,787	$ 3,787	$ 3,787	$ 3,787	$ 3,787	$ 3,787	$ 3,787	$ 3,787	$ 3,787	$ 3,787
		Total Expenses	**$ 2,055,409**	**$ 151,265**	**$ 153,465**	**$ 187,433**	**$ 186,397**	**$ 185,769**	**$ 185,769**	**$ 173,608**	**$ 154,483**	**$ 154,483**	**$ 154,483**	**$ 148,110**	**$ 220,143**

Totals

Revenue	**$ 2,080,960**	**$ 626,228**	**$ 129,907**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 133,586**	**$ 129,907**	**$ 126,228**
Expenses	**$ 2,055,409**	**$ 151,265**	**$ 153,465**	**$ 187,433**	**$ 186,397**	**$ 185,769**	**$ 185,769**	**$ 173,608**	**$ 154,483**	**$ 154,483**	**$ 154,483**	**$ 148,110**	**$ 220,143**
Net Revenue	**$ 25,551**	**$ 474,963**	**$ (23,558)**	**$ (53,847)**	**$ (52,811)**	**$ (52,183)**	**$ (52,183)**	**$ (40,022)**	**$ (20,897)**	**$ (20,897)**	**$ (20,897)**	**$ (18,203)**	**$ (93,915)**
Cash Balance	**$ 31,845**	**$ 474,963**	**$ 451,405**	**$ 397,558**	**$ 344,747**	**$ 292,564**	**$ 240,381**	**$ 200,359**	**$ 179,462**	**$ 158,566**	**$ 137,669**	**$ 119,466**	**$ 25,551**

Ina A. Colen Academy K-8 - 75% Enrollment
Five Year Budget Projections
Complete Budget - Marion County

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates		156 (of est. 156)	272 (of est. 272)	418 (of est. 418)	538 (of est. 538)	658 (of est. 658)	
Income Estimates									
FEFP Calculations									
3310		FEFP - Base Funding		$ 680,890	$ 1,194,217	$ 1,833,999	$ 2,384,349	$ 2,945,841	2019-20 FEFP Conf Report; 1% Yearly Inflation in Year 2; ESOL- 9%, ESE-Disabilities:13% Gifted 6%;
3310		FEFP - ESE Guarantee		$ 24,141	$ 44,200	$ 72,397	$ 94,965	$ 118,729	
3310		FEFP - Supplemental Academic Instruction		$ 47,685	$ 83,975	$ 130,348	$ 169,441	$ 209,304	
3310		FEFP - Discretionary Millage Compression		$ 31,265	$ 55,059	$ 85,464	$ 111,096	$ 137,232	
3310		FEFP - Digital Classroom Allocation		$ 1,022	$ 1,800	$ 2,795	$ 3,633	$ 4,488	
3310		FEFP - Safe Schools Allocations		$ 9,963	$ 17,545	$ 27,234	$ 35,401	$ 43,730	
3310		FEFP - Instructional Materials Allocation		$ 11,833	$ 20,838	$ 32,345	$ 42,046	$ 51,938	
3310		FEFP - Mental Health Assistance Allocation		$ 4,125	$ 7,264	$ 11,276	$ 14,658	$ 18,106	
3310		FEFP - Total Funds Compression Allocation		$ 12,557	$ 22,113	$ 34,324	$ 44,618	$ 55,115	
3310		FEFP - Declining Enrollment		$ 582	$ 1,021	$ 1,568	$ 2,039	$ 2,519	
3310		FEFP - Reading Allocation		$ 6,603	$ 11,583	$ 17,786	$ 23,124	$ 28,571	
3310		FEFP - Discretionary Local Effort		$ 54,121	$ 94,940	$ 145,787	$ 189,539	$ 234,183	
3310		FEFP - Discretionary Lottery		$ 502	$ 880	$ 1,352	$ 1,757	$ 2,171	
3355		FEFP - Class Size Reductions		$ 183,722	$ 324,029	$ 475,748	$ 617,230	$ 761,594	
3492		Transportation (All Riders)		$ 31,275	$ 55,173	$ 85,502	$ 110,846	$ 137,122	48% Transportation Participation
Other Income									
3261		School Lunch Reimbursements	$ -	$ 42,897.60	$ 76,262.40	$ 119,160.00	$ 153,716.40	$ 189,464.40	FRL rates at 77%, assumes 75% FRL student participation; NSLP reimbursement rates Free: $3.31, Reduced: $2.91; Reduced lunch at $0.40/meal; Yr 1: 72 fte, Yr 2: 128 fte, Yr 3: 200 fte, Yr 4: 258 fte, Yr 5: 318 fte;
3397		Capital Outlay Funds	$ -	$ -	$ -	$ 210,058	$ 270,362	$ 330,666	$502 per student (eligible beginning year 3)
3451		School Lunch Collections	$ -	$ 4,752.00	$ 7,344.00	$ 11,232.00	$ 14,256.00	$ 16,848.00	Assumes 25% non FRL student participation; Full price lunch $2.40/meal; Yr 1: 11 fte, Yr 2: 17 fte, Yr 3: 26 fte, Yr 4: 33 fte, Yr 5: 39 fte;
3720		Financing / Loan Proceeds	$ 130,000.00	$ 500,000.00	$ 500,000.00	$ 275,000.00	$ 275,000.00	$ 225,000.00	Startup and operating loans; Interest only Years 1-5 at 3% interest;
		Total Income	**$ 130,000**	**$ 1,647,936**	**$ 2,518,243**	**$ 3,573,375**	**$ 4,558,077**	**$ 5,512,622**	
Expense Estimates									Salaried Positions at 1.875% annual increase and Hourly Positions at 1.5% annual increase; Other expenses at 1% annual inflation;
Function 5100 - Basic Instruction									
5100	120	Classroom Teacher Salaries	$ -	$ 360,000	$ 641,813	$ 980,770	$ 1,284,633	$ 1,599,547	See Staffing Plan; Average Teacher Salary $45,000; 1.875% Annual Raise;
5100	130	Other Certified Staff Member	$ -	$ -	$ 45,844	$ 70,398	$ 95,158	$ 121,884	See Staffing Plan; Average ELL Teacher Salary $45,000; 1.875% Annual Raise;
5100	140	Substitute Teachers	$ -	$ 6,400	$ 12,000	$ 18,000	$ 23,200	$ 28,400	8 days / teacher / year at $100 / day
5100	210	Retirement	$ -	$ 10,800	$ 20,630	$ 31,535	$ 41,394	$ 51,643	3% of salaries
5100	220	FICA	$ -	$ 27,540	$ 52,606	$ 80,414	$ 105,554	$ 131,689	7.65% of salaries
5100	230	Group Insurance	$ -	$ 28,800	$ 55,013	$ 84,093	$ 110,383	$ 137,714	8% of salaries
5100	240	Worker's Compensation	$ -	$ 4,500	$ 8,596	$ 13,140	$ 17,247	$ 21,518	1.25% of salaries
5100	250	Unemployment Compensation	$ -	$ 1,512	$ 2,835	$ 4,253	$ 5,481	$ 6,710	2.7% on first $7,000 / employee
5100	360	Rentals	$ -	$ 15,600	$ 27,472	$ 42,640	$ 55,430	$ 68,472	$100 / student / year
5100	510	Supplies	$ -	$ 7,800	$ 13,736	$ 21,320	$ 27,715	$ 34,236	$50 / student / year
5100	520	Textbooks	$ -	$ 40,170	$ 39,430	$ 54,458	$ 56,703	$ 64,450	$250 / new student / yr + $50 / returning student / yr + $7.50 / student / yr
5100	641	Furniture, Fixtures-Capitalized	$ -	$ 52,650	$ 35,451	$ 41,773	$ 42,191	$ 36,164	$5,850 / new classroom Year 1: 9, Year 2: 6, Year 3: 7, Year 4: 6, Year 5: 6

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates		156 (of est. 156)	272 (of est. 272)	418 (of est. 418)	538 (of est. 538)	658 (of est. 658)	
5100	644	Computer Hardware (Non Capitalized)	$ -	$ 39,000	$ 18,180	$ 28,155	$ 42,654	$ 31,842	2 computers per new classroom at $600 per unit + 25 unit computer lab at $600 per unit (Yr 1 & Yr 4)+ 20% refresh beginning in year 3 + $1,800 / new classroom / year;
5100	730	Dues and Fees	$ -	$ 78	$ 137	$ 213	$ 277	$ 342	$0.50 / student / year
5100	750	Other Personnel Services	$ -	$ 4,500	$ 8,596	$ 13,140	$ 17,247	$ 21,518	1.25% of salaries (payroll fees)
		5100 Sub Total	**$ -**	**$ 599,350**	**$ 982,337**	**$ 1,484,301**	**$ 1,925,268**	**$ 2,356,128**	
		Function 5200 - Exceptional Education							
5200	130	Other Certified Staff Member	$ -	$ 67,500	$ 92,025	$ 140,110	$ 190,316	$ 218,826	See Staffing Plan; ESE/Gifted Average Teacher Salary $45,000; 1.875% Annual Raise;
5200	140	Substitute Teachers	$ -	$ 1,200	$ 1,600	$ 2,400	$ 3,200	$ 3,600	8 days / teacher / year at $100 / day
5200	210	Retirement	$ -	$ 1,350	$ 2,068	$ 4,203	$ 5,709	$ 6,565	3% of salaries
5200	220	FICA	$ -	$ 5,164	$ 7,040	$ 10,718	$ 14,559	$ 16,740	7.65% of salaries
5200	230	Group Insurance	$ -	$ 3,600	$ 5,515	$ 11,209	$ 15,225	$ 17,506	8% of salaries
5200	240	Worker's Compensation	$ -	$ 844	$ 1,150	$ 1,751	$ 2,379	$ 2,735	1.25% of salaries
5200	250	Unemployment Compensation	$ -	$ 378	$ 473	$ 567	$ 756	$ 851	2.7% on first $7,000 / employee
5200	310	Professional and Technical Services	$ -	$ 8,000	$ 15,150	$ 25,503	$ 34,000	$ 42,144	$500 / ESE student w/ Disabilities / year
5200	510	Supplies	$ -	$ 240	$ 455	$ 765	$ 1,020	$ 1,264	$15 / student / year
5200	750	Other Personnel Services	$ -	$ 844	$ 1,150	$ 1,751	$ 2,379	$ 2,735	1.25% of salaries (payroll fees)
		5200 Sub Total	**$ -**	**$ 89,119**	**$ 126,625**	**$ 198,978**	**$ 269,544**	**$ 312,967**	
		Function 6100 - Pupil Services							
6100	130	Other Certified Staff Member	$ 12,500	$ 50,000	$ 50,938	$ 103,785	$ 105,731	$ 107,714	See Staffing Plan; School Counselor Salary $50,000; 1.875% Annual Raise; Startup: 3 mo;
6100	160	Other Support Personnel	$ -	$ -	$ 48,558	$ 49,286	$ 50,025	$ 50,776	See Staffing Plan; School Nurse: $23/hr 40hr/wk 52wk/yr; 1.5% Annual Raise;
6100	210	Retirement	$ -	$ 1,500	$ 2,985	$ 4,592	$ 4,673	$ 4,755	3% of salaries
6100	220	FICA	$ 956	$ 3,825	$ 7,611	$ 11,710	$ 11,915	$ 12,124	7.65% of salaries
6100	230	Group Insurance	$ -	$ 4,000	$ 7,960	$ 12,246	$ 12,461	$ 12,679	8% of salaries
6100	240	Worker's Compensation	$ 156	$ 625	$ 1,244	$ 1,913	$ 1,947	$ 1,981	1.25% of salaries
6100	250	Unemployment Compensation	$ 189	$ 189	$ 378	$ 567	$ 567	$ 567	2.7% on first $7,000 / employee
6100	510	Supplies	$ -	$ 936	$ 1,648	$ 2,558	$ 3,326	$ 4,108	$6 / student / year
6100	641	Furniture, Fixtures-Capitalized	$ 1,500	$ 152	$ 1,652	$ 1,836	$ 618	$ 468	$1,500 / new staff + $150 /returning staff
6100	750	Other Personnel Services	$ 156	$ 625	$ 1,244	$ 1,913	$ 1,947	$ 1,981	1.25% of salaries (payroll fees)
		6100 Sub Total	**$ 15,458**	**$ 61,852**	**$ 124,216**	**$ 190,407**	**$ 193,210**	**$ 197,153**	
		Function 6200 - Instructional Media Services							
6200	510	Supplies	$ -	$ 702	$ 1,236	$ 1,919	$ 2,494	$ 3,081	$4.50 / student / year
		6200 Sub Total	**$ -**	**$ 702**	**$ 1,236**	**$ 1,919**	**$ 2,494**	**$ 3,081**	
		Function 6300 - Instructional/Curriculum Development							
6300	130	Other Certified Staff Member	$ -	$ 48,000	$ 48,900	$ 49,817	$ 50,751	$ 51,703	See Staffing Plan; Curriculum/Intervention Specialist Average Salary $48,000; 1.875% Annual Raise;
6300	210	Retirement	$ -	$ 1,440	$ 1,467	$ 1,495	$ 1,523	$ 1,551	3% of salaries
6300	220	FICA	$ -	$ 3,672	$ 3,741	$ 3,811	$ 3,882	$ 3,955	7.65% of salaries
6300	230	Group Insurance	$ -	$ 3,840	$ 3,912	$ 3,985	$ 4,060	$ 4,136	8% of salaries
6300	240	Worker's Compensation	$ -	$ 600	$ 611	$ 623	$ 634	$ 646	1.25% of salaries
6300	250	Unemployment Compensation	$ -	$ 189	$ 189	$ 189	$ 189	$ 189	2.7% on first $7,000 / employee
6300	510	Supplies	$ -	$ 936	$ 1,648	$ 2,558	$ 3,326	$ 4,108	$6 / student / year
6300	641	Furniture, Fixtures-Capitalized	$ -	$ 1,515	$ 152	$ 153	$ 155	$ 156	$1,500 / new staff + $150 /returning staff
6300	750	Other Personnel Services	$ -	$ 600	$ 611	$ 623	$ 634	$ 646	1.25% of salaries (payroll fees)
		6300 Sub Total	**$ -**	**$ 60,792**	**$ 61,231**	**$ 63,254**	**$ 65,154**	**$ 67,091**	
		Function 6400 - Instructional Staff Training							
6400	310	Professional and Technical Services	$ -	$ 19,688	$ 34,088	$ 50,686	$ 67,614	$ 81,948	$1,875 / teacher and administrator / year
6400	330	Travel	$ -	$ 6,563	$ 11,363	$ 16,895	$ 22,538	$ 27,316	$625 / teacher and administrator / year
6400	510	Supplies	$ -	$ 500	$ 510	$ 520	$ 531	$ 541	$500 / year
		6400 Sub Total	**$ -**	**$ 26,750**	**$ 45,960**	**$ 68,102**	**$ 90,682**	**$ 109,805**	

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates		156 (of est. 156)	272 (of est. 272)	418 (of est. 418)	538 (of est. 538)	658 (of est. 658)	
Function 6500 - Instructional-Related Technology									
6500	310	Professional and Technical Services	$ -	$ 12,000	$ 12,120	$ 12,241	$ 12,364	$ 12,487	$12,000 / year
		6500 Sub Total	**$ -**	**$ 12,000**	**$ 12,120**	**$ 12,241**	**$ 12,364**	**$ 12,487**	
Function 7100 - Board									
7100	310	Professional and Technical Services	$ 5,500	$ 2,500	$ 2,550	$ 3,101	$ 2,653	$ 2,706	Startup: $5,500; Year 1 - Year 5: $2,500 / year;
7100	320	Insurance and Bond Premiums	$ -	$ 5,460	$ 9,615	$ 14,924	$ 19,401	$ 23,965	$35 /student / year
7100	330	Travel	$ 2,000	$ 2,000	$ 2,020	$ 2,040	$ 2,061	$ 2,081	Startup: $2,000; Year 1 - Year 5: $2,000 / year
		7100 Sub Total	**$ 7,500**	**$ 9,960**	**$ 14,185**	**$ 20,065**	**$ 24,114**	**$ 28,752**	
Function 7200 - General / District Administration									
7200	730	Dues and Fees	$ -	$ 55,014	$ 88,908	$ 88,455	$ 89,330	$ 90,248	5% of FEFP at 250 FTE
		7200 Sub Total	**$ -**	**$ 55,014**	**$ 88,908**	**$ 88,455**	**$ 89,330**	**$ 90,248**	
Function 7300 - School Administration									
7300	110	Administrator Salaries	$ 47,500	$ 95,000	$ 96,781	$ 98,596	$ 174,456	$ 177,727	See Staffing Plan; Principal $95,000 + AP $70,000; 1.875% Annual Raise; Startup: Principal 6 mo.;
7300	160	Other Support Personnel	$ 7,200	$ 56,160	$ 57,002	$ 57,857	$ 58,725	$ 59,606	See Staffing Plan; Office Manager $15/hr 40hr/wk 52wk/yr + Data Clerk $12/hr 40hr/wk 52wk/yr; 1.5% Annual Raise; Startup: OM 12 weeks;
7300	210	Retirement	$ -	$ 4,535	$ 4,614	$ 4,694	$ 6,995	$ 7,120	3% of salaries
7300	220	FICA	$ 4,185	$ 11,564	$ 11,764	$ 11,969	$ 17,838	$ 18,156	7.65% of salaries
7300	230	Group Insurance	$ -	$ 12,093	$ 12,303	$ 12,516	$ 18,655	$ 18,987	8% of salaries
7300	240	Worker's Compensation	$ 684	$ 1,890	$ 1,922	$ 1,956	$ 2,915	$ 2,967	1.25% of salaries
7300	250	Unemployment Compensation	$ 378	$ 567	$ 567	$ 567	$ 756	$ 756	2.7% on first $7,000 / employee
7300	310	Professional and Technical Services	$ -	$ 468	$ 824	$ 1,279	$ 1,663	$ 2,054	$3 / student / year
7300	360	Rentals	$ -	$ 3,432	$ 6,044	$ 9,381	$ 12,195	$ 15,064	$22 / student / year
7300	370	Communications	$ -	$ 624	$ 1,099	$ 1,706	$ 2,217	$ 2,739	$4 / student / year
7300	390	Other Purchased Services	$ 15,000	$ 1,560	$ 2,747	$ 4,264	$ 5,543	$ 6,847	Startup: $15,000; Year 1 - Year 5: $10 / student / year;
7300	510	Supplies	$ -	$ 3,432	$ 6,044	$ 9,381	$ 12,195	$ 15,064	$22 / student / year
7300	641	Furniture, Fixtures-Capitalized	$ 3,000	$ 1,500	$ 455	$ 459	$ 2,009	$ 624	$1,500 / new staff + $150 / returning staff
7300	644	Computer Hardware (Non Capitalized)	$ 1,700	$ 1,474	$ 1,099	$ 1,706	$ 3,119	$ 2,739	$850 / new staff + $4 / student / year
7300	690	Computer Software	$ -	$ 3,000	$ 303	$ 306	$ 1,339	$ 416	$1,000 / new staff + $100 / returning staff
7300	730	Dues and Fees	$ -	$ 624	$ 1,099	$ 1,706	$ 2,217	$ 2,739	$4 / student / year
7300	750	Other Personnel Services	$ 684	$ 1,890	$ 1,922	$ 1,956	$ 2,915	$ 2,967	1.25% of salaries (payroll fees)
		7300 Sub Total	**$ 80,330**	**$ 199,811**	**$ 206,589**	**$ 220,297**	**$ 325,753**	**$ 336,572**	
Function 7500 - Fiscal Services									
7500	310	Professional and Technical Services	$ -	$ 30,313	$ 59,180	$ 85,051	$ 105,291	$ 124,237	Backoffice: Year 1: 2.9% net FEFP, Year 2: 2.8%, Year 3: 2.7%, Year 4: 2.6%, Year 5: 2.5% + Auditor: $7,500 / year beginning Year 2
7500	720	Interest Payment / Debt Service	$ 3,900	$ 18,900	$ 33,900	$ 42,150	$ 50,400	$ 57,150	Year 1 -5: 3% interest only payments on startup and operating loans;
		7500 Sub Total	**$ 3,900**	**$ 49,213**	**$ 93,080**	**$ 127,201**	**$ 155,691**	**$ 181,387**	
Function 7600 - Food Services									
7600	160	Other Support Personnel	$ -	$ 11,880	$ 24,116	$ 24,478	$ 24,845	$ 37,827	See Staffing Plan; Food Service Workers: $11/hr 30hr/wk 36wk/yr; 1.5% Annual Raise;
7600	210	Retirement	$ -	$ 356	$ 723	$ 734	$ 745	$ 1,135	3% of salaries
7600	220	FICA	$ -	$ 909	$ 1,845	$ 1,873	$ 1,901	$ 2,894	7.65% of salaries
7600	230	Group Insurance	$ -	$ 950	$ 1,929	$ 1,958	$ 1,988	$ 3,026	8% of salaries
7600	240	Worker's Compensation	$ -	$ 149	$ 301	$ 306	$ 311	$ 473	1.25% of salaries
7600	250	Unemployment Compensation	$ -	$ 189	$ 378	$ 378	$ 378	$ 567	2.7% on first $7,000 / employee
7600	570	Food	$ -	$ 35,856	$ 62,640	$ 97,632	$ 125,712	$ 154,224	$2.40 / student meal at 180 days; FRL rates at 77%, assumes 75% FRL student participation and 25% other participation; Yr 1: 83 fte, Yr 2: 145 fte, Yr 3: 226 fte, Yr 4: 291 fte, Yr 5: 357 fte;
7600	641	Furniture, Fixtures-Capitalized	$ -	$ 5,000	$ 1,000	$ 1,010	$ 1,020	$ 1,030	Year 1: $5,000, Year 2 - 5: $1,000 per year;
7600	642	Furniture, Fixtures (Non Capitalized)	$ -	$ 1,000	$ 500	$ 505	$ 510	$ 515	Year 1: $1,000, Year 2 - 5: $500 per year;
7600	750	Other Personnel Services	$ -	$ 149	$ 301	$ 306	$ 311	$ 473	1.25% of salaries (payroll fees)
		7600 Sub Total	**$ -**	**$ 56,438**	**$ 93,735**	**$ 129,180**	**$ 157,720**	**$ 202,164**	

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates		156 (of est. 156)	272 (of est. 272)	418 (of est. 418)	538 (of est. 538)	658 (of est. 658)	
Function 7800 - Pupil Transportation									
7800	390	Other Purchased Services	$ -	$ 86,400	$ 130,896	$ 220,342	$ 267,054	$ 314,679	48% transportation participation; 48 students / bus at $240 / bus / day at 180 days per year; Buses / year: Year 1: 2, Year 2: 3, Year 3: 5, Year 4: 6, Year 5: 7;
		7800 Sub Total	**$ -**	**$ 86,400**	**$ 130,896**	**$ 220,342**	**$ 267,054**	**$ 314,679**	
Function 7900 - Operation of Plant									
7900	160	Other Support Personnel	$ -	$ 24,960	$ 50,669	$ 77,143	$ 78,300	$ 79,475	See Staffing Plan; Custodian (Day Porter): $12/hr 40hr/wk 52wk/yr; 1.5% Annual Raise;
7900	210	Retirement	$ -	$ 749	$ 1,520	$ 2,314	$ 2,349	$ 2,384	3% of salaries
7900	220	FICA	$ -	$ 1,909	$ 3,876	$ 5,901	$ 5,990	$ 6,080	7.65% of salaries
7900	230	Group Insurance	$ -	$ 1,997	$ 4,054	$ 6,171	$ 6,264	$ 6,358	8% of salaries
7900	240	Worker's Compensation	$ -	$ 312	$ 633	$ 964	$ 979	$ 993	1.25% of salaries
7900	250	Unemployment Compensation	$ -	$ 189	$ 378	$ 567	$ 567	$ 567	2.7% on first $7,000 / employee
7900	310	Professional and Technical Services	$ -	$ 60,000	$ 60,600	$ 61,206	$ 61,818	$ 62,436	SRO at $60,000 per year;
7900	320	Insurance and Bond Premiums	$ 2,006	$ 12,038	$ 21,475	$ 32,133	$ 41,727	$ 50,456	$.75/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	350	Repairs and Maintenance	$ -	$ 25,000	$ 25,250	$ 25,503	$ 25,758	$ 26,015	Year 1-5 $25,000 / year;
7900	360	Rentals	$ -	$ 77,020	$ 135,425	$ 207,055	$ 346,027	$ 570,077	Year 1 - 3 at 7% of FEFP revenue, Year 4 at 9% of FEFP, and Year 5 at 12% of FEFP;
7900	370	Communications	$ 3,000	$ 18,000	$ 18,180	$ 18,362	$ 18,545	$ 18,731	Year 1-5: $1,500 / mo; Startup: 2 months at year 1 cost;
7900	380	Public Utilities	$ 2,006	$ 12,038	$ 21,475	$ 32,133	$ 41,727	$ 50,456	$.75/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	390	Other Purchased Services	$ 5,270	$ 31,620	$ 53,742	$ 78,731	$ 101,237	$ 121,709	Pest Control, Fire Monitoring etc: $85 / classroom (Classrooms: Year 1: 11, Year 2: 19, Year 3: 28, Year 4: 36, Year 5: 43); HVAC: $1,000 / year; Inspections: $2,400 / year; Landscape: $0.75 / SF; Contract Custodial: $0.95/SF; (Square Footage: Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF); Startup: 2 months at year 1 cost;
7900	430	Electricity	$ 3,344	$ 20,063	$ 35,792	$ 53,555	$ 69,545	$ 84,094	$1.25/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	510	Supplies	$ 650	$ 3,900	$ 6,868	$ 10,660	$ 13,858	$ 17,118	$25 / student / year; Startup: 2 months at year 1 cost;
7900	750	Other Personnel Services	$ -	$ 312	$ 633	$ 964	$ 979	$ 993	1.25% of salaries (payroll fees)
		7900 Sub Total	**$ 16,276**	**$ 290,106**	**$ 440,570**	**$ 613,364**	**$ 815,670**	**$ 1,097,944**	
		Reserve Fund	$ -	$ 33,009	$ 58,039	$ 88,738	$ 115,342	$ 142,519	3% Net FEFP
		Total Expenses	**$ 123,464**	**$ 1,630,515**	**$ 2,479,729**	**$ 3,526,843**	**$ 4,509,391**	**$ 5,452,977**	

Totals

Revenue	**$ 130,000**	**$ 1,647,936**	**$ 2,518,243**	**$ 3,573,375**	**$ 4,558,077**	**$ 5,512,622**
Expenses	**$ 123,464**	**$ 1,630,515**	**$ 2,479,729**	**$ 3,526,843**	**$ 4,509,391**	**$ 5,452,977**
Net Revenue	**$ 6,536**	**$ 17,421**	**$ 38,514**	**$ 46,533**	**$ 48,686**	**$ 59,645**
Cash Balance	**$ 6,536**	**$ 23,957**	**$ 62,471**	**$ 109,004**	**$ 157,689**	**$ 217,334**

Ina A. Colen Academy K-8 - 75% Enrollment

Five Year Staffing Projections

	Year 1	Year 2	Year 3	Year 4	Year 5
Principal	1	1	1	1	1
Assistant Principal	0	0	0	1	1
Classroom Teachers K-5	7	12	16	20	23
Classroom Teachers 6-8	1	2	5	7	10
ESE Teacher/Specialist	1	1.5	2	3	3.5
Gifted Teacher	0.5	0.5	1	1	1
ELL Coordinator/Specialist	0	1	1.5	2	2.5
School Counselor	1	1	2	2	2
Curriculum/Intervention Specialist	1	1	1	1	1
Office Manager	1	1	1	1	1
Registrar/Data Entry	1	1	1	1	1
School Nurse	0	1	1	1	1
Custodian (Day Porter)	1	2	3	3	3
Food Service Workers	1	2	2	2	3
Total Employees	**16.5**	**27**	**37.5**	**46**	**54**

Ina A. Colen Academy K-8 - 50% Enrollment
Five Year Budget Projections
Complete Budget - Marion County

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates		108 (of est. 108)	190 (of est. 190)	280 (of est. 280)	356 (of est. 356)	436 (of est. 436)	
Income Estimates									
FEFP Calculations									
3310		FEFP - Base Funding		$ 475,279	$ 828,562	$ 1,224,804	$ 1,581,669	$ 1,955,284	2019-20 FEFP Conf Report; 1% Yearly Inflation in Year 2; ESOL- 9%, ESE-Disabilities:13% Gifted 6%;
3310		FEFP - ESE Guarantee		$ 16,939	$ 28,340	$ 45,019	$ 59,917	$ 76,245	
3310		FEFP - Supplemental Academic Instruction		$ 33,019	$ 58,662	$ 87,304	$ 112,114	$ 138,681	
3310		FEFP - Discretionary Millage Compression		$ 21,649	$ 38,462	$ 57,242	$ 73,509	$ 90,927	
3310		FEFP - Digital Classroom Allocation		$ 708	$ 1,258	$ 1,872	$ 2,404	$ 2,973	
3310		FEFP - Safe Schools Allocations		$ 6,899	$ 12,256	$ 18,241	$ 23,424	$ 28,975	
3310		FEFP - Instructional Materials Allocation		$ 8,194	$ 14,557	$ 21,664	$ 27,821	$ 34,413	
3310		FEFP - Mental Health Assistance Allocation		$ 2,856	$ 5,075	$ 7,552	$ 9,699	$ 11,997	
3310		FEFP - Total Funds Compression Allocation		$ 8,695	$ 15,447	$ 22,989	$ 29,522	$ 36,518	
3310		FEFP - Declining Enrollment		$ 406	$ 709	$ 1,047	$ 1,352	$ 1,672	
3310		FEFP - Reading Allocation		$ 4,610	$ 8,036	$ 11,878	$ 15,340	$ 18,963	
3310		FEFP - Discretionary Local Effort		$ 37,787	$ 65,871	$ 97,358	$ 125,738	$ 155,433	
3310		FEFP - Discretionary Lottery		$ 350	$ 611	$ 903	$ 1,166	$ 1,441	
3355		FEFP - Class Size Reductions		$ 132,334	$ 220,125	$ 314,918	$ 415,295	$ 511,378	
3492		Transportation (All Riders)		$ 21,684	$ 38,326	$ 57,001	$ 73,468	$ 90,692	48% Transportation Participation
Other Income									
3261		School Lunch Reimbursements	$ -	$ 28,598.40	$ 53,026.20	$ 78,645.60	$ 101,286.00	$ 123,926.40	FRL rates at 77%, assumes 75% FRL student participation; NSLP reimbursement rates Free: $3.31, Reduced: $2.91; Reduced lunch at $0.40/meal; Yr 1: 48 fte, Yr 2: 89 fte, Yr 3: 132 fte, Yr 4: 170 fte, Yr 5: 208 fte;
3397		Capital Outlay Funds	$ -	$ -	$ -	$ 140,709	$ 178,901	$ 219,104	$502 per student (eligible beginning year 3)
3451		School Lunch Collections	$ -	$ 3,456.00	$ 5,616.00	$ 7,776.00	$ 9,504.00	$ 11,664.00	Assumes 25% non FRL student participation; Full price lunch $2.40/meal; Yr 1: 8 fte, Yr 2: 13 fte, Yr 3: 18 fte, Yr 4: 22 fte, Yr 5: 27 fte;
3720		Financing / Loan Proceeds	$ 130,000.00	$ 650,000.00	$ 590,000.00	$ 450,000.00	$ 430,000.00	$ 680,000.00	Startup and operating loans; Interest only Years 1-5 at 3% interest;
		Total Income	**$ 130,000**	**$ 1,453,463**	**$ 1,984,939**	**$ 2,646,923**	**$ 3,272,129**	**$ 4,190,286**	
Expense Estimates									Salaried Positions at 1.875% annual increase and Hourly Positions at 1.5% annual increase; Other expenses at 1% annual inflation;
Function 5100 - Basic Instruction									
5100	120	Classroom Teacher Salaries	$ -	$ 315,000	$ 458,438	$ 653,846	$ 856,422	$ 1,066,365	See Staffing Plan; Average Teacher Salary $45,000; 1.875% Annual Raise;
5100	130	Other Certified Staff Member	$ -	$ -	$ 23,091	$ 46,703	$ 47,579	$ 73,413	See Staffing Plan; Average ELL Teacher Salary $45,000; 1.875% Annual Raise;
5100	140	Substitute Teachers	$ -	$ 5,600	$ 8,400	$ 12,000	$ 15,200	$ 18,800	8 days / teacher / year at $100 / day
5100	210	Retirement	$ -	$ 9,450	$ 13,753	$ 21,016	$ 27,120	$ 34,193	3% of salaries
5100	220	FICA	$ -	$ 24,098	$ 36,837	$ 53,592	$ 69,156	$ 87,193	7.65% of salaries
5100	230	Group Insurance	$ -	$ 25,200	$ 36,675	$ 56,044	$ 72,320	$ 91,182	8% of salaries
5100	240	Worker's Compensation	$ -	$ 3,938	$ 6,019	$ 8,757	$ 11,300	$ 14,247	1.25% of salaries
5100	250	Unemployment Compensation	$ -	$ 1,323	$ 2,079	$ 2,835	$ 3,591	$ 4,442	2.7% on first $7,000 / employee
5100	360	Rentals	$ -	$ 10,800	$ 19,190	$ 28,563	$ 36,679	$ 45,370	$100 / student / year
5100	510	Supplies	$ -	$ 5,400	$ 9,595	$ 14,281	$ 18,339	$ 22,685	$50 / student / year
5100	520	Textbooks	$ -	$ 27,810	$ 27,699	$ 34,785	$ 36,751	$ 42,946	$250 / new student / yr + $50 / returning student / yr + $7.50 / student / yr
5100	641	Furniture, Fixtures-Capitalized	$ -	$ 46,800	$ 17,726	$ 23,870	$ 30,136	$ 24,109	$5,850 / new classroom Year 1: 7, Year 2: 4, Year 3: 4, Year 4: 4, Year 5: 4

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates		108 (of est. 108)	190 (of est. 190)	280 (of est. 280)	356 (of est. 356)	436 (of est. 436)	
5100	644	Computer Hardware (Non Capitalized)	$ -	$ 33,000	$ 12,120	$ 17,750	$ 34,618	$ 23,726	2 computers per new classroom at $600 per unit + 25 unit computer lab at $600 per unit (Yr 1 & Yr 4)+ 20% refresh beginning in year 3 + $1,800 / new classroom / year;
5100	730	Dues and Fees	$ -	$ 54	$ 96	$ 143	$ 183	$ 227	$0.50 / student / year
5100	750	Other Personnel Services	$ -	$ 3,938	$ 6,019	$ 8,757	$ 11,300	$ 14,247	1.25% of salaries (payroll fees)
		5100 Sub Total	**$ -**	**$ 512,410**	**$ 677,736**	**$ 982,944**	**$ 1,270,695**	**$ 1,563,144**	
		Function 5200 - Exceptional Education							
5200	130	Other Certified Staff Member	$ -	$ 45,000	$ 68,934	$ 94,092	$ 119,469	$ 170,355	See Staffing Plan; ESE/Gifted Average Teacher Salary $45,000; 1.875% Annual Raise;
5200	140	Substitute Teachers	$ -	$ 800	$ 1,200	$ 1,600	$ 2,000	$ 2,800	8 days / teacher / year at $100 / day
5200	210	Retirement	$ -	$ -	$ 1,375	$ 2,112	$ 2,855	$ 5,111	3% of salaries
5200	220	FICA	$ -	$ 3,443	$ 5,273	$ 7,198	$ 9,139	$ 13,032	7.65% of salaries
5200	230	Group Insurance	$ -	$ -	$ 3,668	$ 5,632	$ 7,613	$ 13,628	8% of salaries
5200	240	Worker's Compensation	$ -	$ 563	$ 862	$ 1,176	$ 1,493	$ 2,129	1.25% of salaries
5200	250	Unemployment Compensation	$ -	$ 378	$ 378	$ 473	$ 567	$ 662	2.7% on first $7,000 / employee
5200	310	Professional and Technical Services	$ -	$ 6,000	$ 9,595	$ 15,302	$ 21,121	$ 27,576	$500 / ESE student w/ Disabilities / year
5200	510	Supplies	$ -	$ 180	$ 288	$ 459	$ 634	$ 827	$15 / student / year
5200	750	Other Personnel Services	$ -	$ 563	$ 862	$ 1,176	$ 1,493	$ 2,129	1.25% of salaries (payroll fees)
		5200 Sub Total	**$ -**	**$ 56,926**	**$ 92,435**	**$ 129,219**	**$ 166,384**	**$ 238,250**	
		Function 6100 - Pupil Services							
6100	130	Other Certified Staff Member	$ 12,500	$ 50,000	$ 50,938	$ 51,893	$ 52,866	$ 107,714	See Staffing Plan; School Counselor Salary $50,000; 1.875% Annual Raise; Startup: 3 mo;
6100	160	Other Support Personnel	$ -	$ -	$ 48,558	$ 49,286	$ 50,025	$ 50,776	See Staffing Plan; School Nurse: $23/hr 40hr/wk 52wk/yr; 1.5% Annual Raise;
6100	210	Retirement	$ -	$ 1,500	$ 2,985	$ 3,035	$ 3,087	$ 4,755	3% of salaries
6100	220	FICA	$ 956	$ 3,825	$ 7,611	$ 7,740	$ 7,871	$ 12,124	7.65% of salaries
6100	230	Group Insurance	$ -	$ 4,000	$ 7,960	$ 8,094	$ 8,231	$ 12,679	8% of salaries
6100	240	Worker's Compensation	$ 156	$ 625	$ 1,244	$ 1,265	$ 1,286	$ 1,981	1.25% of salaries
6100	250	Unemployment Compensation	$ 189	$ 189	$ 378	$ 378	$ 378	$ 567	2.7% on first $7,000 / employee
6100	510	Supplies	$ -	$ 648	$ 1,151	$ 1,714	$ 2,201	$ 2,722	$6 / student / year
6100	641	Furniture, Fixtures-Capitalized	$ 1,500	$ 152	$ 1,652	$ 306	$ 309	$ 1,873	$1,500 / new staff + $150 /returning staff
6100	750	Other Personnel Services	$ 156	$ 625	$ 1,244	$ 1,265	$ 1,286	$ 1,981	1.25% of salaries (payroll fees)
		6100 Sub Total	**$ 15,458**	**$ 61,564**	**$ 123,719**	**$ 124,976**	**$ 127,540**	**$ 197,172**	
		Function 6200 - Instructional Media Services							
6200	510	Supplies	$ -	$ 486	$ 864	$ 1,285	$ 1,651	$ 2,042	$4.50 / student / year
		6200 Sub Total	**$ -**	**$ 486**	**$ 864**	**$ 1,285**	**$ 1,651**	**$ 2,042**	
		Function 6300 - Instructional/Curriculum Development							
6300	130	Other Certified Staff Member	$ -	$ 48,000	$ 48,900	$ 49,817	$ 50,751	$ 51,703	See Staffing Plan; Curriculum/Intervention Specialist Average Salary $48,000; 1.875% Annual Raise;
6300	210	Retirement	$ -	$ 1,440	$ 1,467	$ 1,495	$ 1,523	$ 1,551	3% of salaries
6300	220	FICA	$ -	$ 3,672	$ 3,741	$ 3,811	$ 3,882	$ 3,955	7.65% of salaries
6300	230	Group Insurance	$ -	$ 3,840	$ 3,912	$ 3,985	$ 4,060	$ 4,136	8% of salaries
6300	240	Worker's Compensation	$ -	$ 600	$ 611	$ 623	$ 634	$ 646	1.25% of salaries
6300	250	Unemployment Compensation	$ -	$ 189	$ 189	$ 189	$ 189	$ 189	2.7% on first $7,000 / employee
6300	510	Supplies	$ -	$ 648	$ 1,151	$ 1,714	$ 2,201	$ 2,722	$6 / student / year
6300	641	Furniture, Fixtures-Capitalized	$ -	$ 1,515	$ 152	$ 153	$ 155	$ 156	$1,500 / new staff + $150 /returning staff
6300	750	Other Personnel Services	$ -	$ 600	$ 611	$ 623	$ 634	$ 646	1.25% of salaries (payroll fees)
		6300 Sub Total	**$ -**	**$ 60,504**	**$ 60,734**	**$ 62,409**	**$ 64,029**	**$ 65,705**	
		Function 6400 - Instructional Staff Training							
6400	310	Professional and Technical Services	$ -	$ 16,875	$ 24,619	$ 34,428	$ 43,466	$ 56,583	$1,875 / teacher and administrator / year
6400	330	Travel	$ -	$ 5,625	$ 8,206	$ 11,476	$ 14,489	$ 18,861	$625 / teacher and administrator / year
6400	510	Supplies	$ -	$ 500	$ 510	$ 520	$ 531	$ 541	$500 / year
		6400 Sub Total	**$ -**	**$ 23,000**	**$ 33,335**	**$ 46,425**	**$ 58,485**	**$ 75,985**	

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates		108 (of est. 108)	190 (of est. 190)	280 (of est. 280)	356 (of est. 356)	436 (of est. 436)	
Function 6500 - Instructional-Related Technology									
6500	310	Professional and Technical Services	$ -	$ 12,000	$ 12,120	$ 12,241	$ 12,364	$ 12,487	$12,000 / year
		6500 Sub Total	**$ -**	**$ 12,000**	**$ 12,120**	**$ 12,241**	**$ 12,364**	**$ 12,487**	
Function 7100 - Board									
7100	310	Professional and Technical Services	$ 5,500	$ 2,500	$ 2,550	$ 3,101	$ 2,653	$ 2,706	Startup: $5,500; Year 1 - Year 5: $2,500 / year;
7100	320	Insurance and Bond Premiums	$ -	$ 3,780	$ 6,717	$ 9,997	$ 12,838	$ 15,880	$35 /student / year
7100	330	Travel	$ 2,000	$ 2,000	$ 2,020	$ 2,040	$ 2,061	$ 2,081	Startup: $2,000; Year 1 - Year 5: $2,000 / year
		7100 Sub Total	**$ 7,500**	**$ 8,280**	**$ 11,287**	**$ 15,138**	**$ 17,551**	**$ 20,667**	
Function 7200 - General / District Administration									
7200	730	Dues and Fees	$ -	$ 38,570	$ 66,815	$ 87,937	$ 89,622	$ 90,470	5% of FEFP at 250 FTE
		7200 Sub Total	**$ -**	**$ 38,570**	**$ 66,815**	**$ 87,937**	**$ 89,622**	**$ 90,470**	
Function 7300 - School Administration									
7300	110	Administrator Salaries	$ 47,500	$ 95,000	$ 96,781	$ 98,596	$ 100,445	$ 177,727	See Staffing Plan; Principal $95,000 + AP $70,000; 1.875% Annual Raise; Startup: Principal 6 mo.;
7300	160	Other Support Personnel	$ 7,200	$ 56,160	$ 57,002	$ 57,857	$ 58,725	$ 59,606	See Staffing Plan; Office Manager $15/hr 40hr/wk 52wk/yr + Data Clerk $12/hr 40hr/wk 52wk/yr; 1.5% Annual Raise; Startup: OM 12 weeks;
7300	210	Retirement	$ -	$ 4,535	$ 4,614	$ 4,694	$ 4,775	$ 7,120	3% of salaries
7300	220	FICA	$ 4,185	$ 11,564	$ 11,764	$ 11,969	$ 12,176	$ 18,156	7.65% of salaries
7300	230	Group Insurance	$ -	$ 12,093	$ 12,303	$ 12,516	$ 12,734	$ 18,987	8% of salaries
7300	240	Worker's Compensation	$ 684	$ 1,890	$ 1,922	$ 1,956	$ 1,990	$ 2,967	1.25% of salaries
7300	250	Unemployment Compensation	$ 378	$ 567	$ 567	$ 567	$ 567	$ 756	2.7% on first $7,000 / employee
7300	310	Professional and Technical Services	$ -	$ 324	$ 576	$ 857	$ 1,100	$ 1,361	$3 / student / year
7300	360	Rentals	$ -	$ 2,376	$ 4,222	$ 6,284	$ 8,069	$ 9,981	$22 / student / year
7300	370	Communications	$ -	$ 432	$ 768	$ 1,143	$ 1,467	$ 1,815	$4 / student / year
7300	390	Other Purchased Services	$ 15,000	$ 1,080	$ 1,919	$ 2,856	$ 3,668	$ 4,537	Startup: $15,000; Year 1 - Year 5: $10 / student / year;
7300	510	Supplies	$ -	$ 2,376	$ 4,222	$ 6,284	$ 8,069	$ 9,981	$22 / student / year
7300	641	Furniture, Fixtures-Capitalized	$ 3,000	$ 1,500	$ 455	$ 459	$ 464	$ 2,029	$1,500 / new staff + $150 / returning staff
7300	644	Computer Hardware (Non Capitalized)	$ 1,700	$ 1,282	$ 768	$ 1,143	$ 1,467	$ 2,735	$850 / new staff + $4 / student / year
7300	690	Computer Software	$ -	$ 3,000	$ 303	$ 306	$ 309	$ 1,353	$1,000 / new staff + $100 / returning staff
7300	730	Dues and Fees	$ -	$ 432	$ 768	$ 1,143	$ 1,467	$ 1,815	$4 / student / year
7300	750	Other Personnel Services	$ 684	$ 1,890	$ 1,922	$ 1,956	$ 1,990	$ 2,967	1.25% of salaries (payroll fees)
		7300 Sub Total	**$ 80,330**	**$ 196,499**	**$ 200,874**	**$ 210,584**	**$ 219,482**	**$ 323,893**	
Function 7500 - Fiscal Services									
7500	310	Professional and Technical Services	$ -	$ 21,985	$ 44,315	$ 62,149	$ 76,610	$ 90,486	Backoffice: Year 1: 3% net FEFP, Year 2: 2.9%, Year 3: 2.9%, Year 4: 2.8%, Year 5: 2.7% + Auditor: $7,500 / year beginning Year 2
7500	720	Interest Payment / Debt Service	$ 3,900	$ 23,400	$ 41,100	$ 54,600	$ 67,500	$ 87,900	Year 1 -5: 3% interest only payments on startup and operating loans;
		7500 Sub Total	**$ 3,900**	**$ 45,385**	**$ 85,415**	**$ 116,749**	**$ 144,110**	**$ 178,386**	
Function 7600 - Food Services									
7600	160	Other Support Personnel	$ -	$ 11,880	$ 24,116	$ 24,478	$ 24,845	$ 37,827	See Staffing Plan; Food Service Workers: $11/hr 30hr/wk 36wk/yr; 1.5% Annual Raise;
7600	210	Retirement	$ -	$ 356	$ 723	$ 734	$ 745	$ 1,135	3% of salaries
7600	220	FICA	$ -	$ 909	$ 1,845	$ 1,873	$ 1,901	$ 2,894	7.65% of salaries
7600	230	Group Insurance	$ -	$ 950	$ 1,929	$ 1,958	$ 1,988	$ 3,026	8% of salaries
7600	240	Worker's Compensation	$ -	$ 149	$ 301	$ 306	$ 311	$ 473	1.25% of salaries
7600	250	Unemployment Compensation	$ -	$ 189	$ 378	$ 378	$ 378	$ 567	2.7% on first $7,000 / employee
7600	570	Food	$ -	$ 24,192	$ 44,064	$ 64,800	$ 82,944	$ 101,520	$2.40 / student meal at 180 days; FRL rates at 77%, assumes 75% FRL student participation and 25% other participation; Yr 1: 56 fte, Yr 2: 102 fte, Yr 3: 150 fte, Yr 4: 192 fte, Yr 5: 235 fte;
7600	641	Furniture, Fixtures-Capitalized	$ -	$ 5,000	$ 1,000	$ 1,010	$ 1,020	$ 1,030	Year 1: $5,000, Year 2 - 5: $1,000 per year;
7600	642	Furniture, Fixtures (Non Capitalized)	$ -	$ 1,000	$ 500	$ 505	$ 510	$ 515	Year 1: $1,000, Year 2 - 5: $500 per year;
7600	750	Other Personnel Services	$ -	$ 149	$ 301	$ 306	$ 311	$ 473	1.25% of salaries (payroll fees)
		7600 Sub Total	**$ -**	**$ 44,774**	**$ 75,159**	**$ 96,348**	**$ 114,952**	**$ 149,460**	

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5	
		Enrollment Estimates		108 (of est. 108)	190 (of est. 190)	280 (of est. 280)	356 (of est. 356)	436 (of est. 436)	
Function 7800 - Pupil Transportation									
7800	390	Other Purchased Services	$ -	$ 86,400	$ 87,264	$ 132,205	$ 178,036	$ 224,770	48% transportation participation; 48 students / bus at $240 / bus / day at 180 days per year; Buses / year: Year 1: 2, Year 2: 2, Year 3: 3, Year 4: 4, Year 5: 5;
		7800 Sub Total	**$ -**	**$ 86,400**	**$ 87,264**	**$ 132,205**	**$ 178,036**	**$ 224,770**	
Function 7900 - Operation of Plant									
7900	160	Other Support Personnel	$ -	$ 24,960	$ 50,669	$ 77,143	$ 78,300	$ 79,475	See Staffing Plan; Custodian (Day Porter): $12/hr 40hr/wk 52wk/yr; 1.5% Annual Raise;
7900	210	Retirement	$ -	$ 749	$ 1,520	$ 2,314	$ 2,349	$ 2,384	3% of salaries
7900	220	FICA	$ -	$ 1,909	$ 3,876	$ 5,901	$ 5,990	$ 6,080	7.65% of salaries
7900	230	Group Insurance	$ -	$ 1,997	$ 4,054	$ 6,171	$ 6,264	$ 6,358	8% of salaries
7900	240	Worker's Compensation	$ -	$ 312	$ 633	$ 964	$ 979	$ 993	1.25% of salaries
7900	250	Unemployment Compensation	$ -	$ 189	$ 378	$ 567	$ 567	$ 567	2.7% on first $7,000 / employee
7900	310	Professional and Technical Services	$ -	$ 60,000	$ 60,600	$ 61,206	$ 61,818	$ 62,436	SRO at $60,000 per year;
7900	320	Insurance and Bond Premiums	$ 2,006	$ 12,038	$ 21,475	$ 32,133	$ 41,727	$ 50,456	$.75/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	350	Repairs and Maintenance	$ -	$ 25,000	$ 25,250	$ 25,503	$ 25,758	$ 26,015	Year 1-5 $25,000 / year;
7900	360	Rentals	$ -	$ 53,999	$ 93,541	$ 137,885	$ 229,719	$ 378,671	Year 1 - 3 at 7% of FEFP revenue, Year 4 at 9% of FEFP, and Year 5 at 12% of FEFP;
7900	370	Communications	$ 3,000	$ 18,000	$ 18,180	$ 18,362	$ 18,545	$ 18,731	Year 1-5: $1,500 / mo; Startup: 2 months at year 1 cost;
7900	380	Public Utilities	$ 2,006	$ 12,038	$ 21,475	$ 32,133	$ 41,727	$ 50,456	$.75/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	390	Other Purchased Services	$ 5,270	$ 31,620	$ 53,742	$ 78,731	$ 101,237	$ 121,709	Pest Control, Fire Monitoring etc: $85 / classroom (Classrooms: Year 1: 11, Year 2: 19, Year 3: 28, Year 4: 36, Year 5: 43); HVAC: $1,000 / year; Inspections: $2,400 / year; Landscape: $0.75 / SF; Contract Custodial: $0.95/SF; (Square Footage: Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF); Startup: 2 months at year 1 cost;
7900	430	Electricity	$ 3,344	$ 20,063	$ 35,792	$ 53,555	$ 69,545	$ 84,094	$1.25/SF; Year 1-5 at 75 SF / student; Year 1: 16,050 SF, Year 2: 28,350 SF, Year 3: 42,000 SF, Year 4: 54,000 SF, Year 5: 64,650 SF; Startup: 2 months at year 1 cost;
7900	510	Supplies	$ 450	$ 2,700	$ 4,798	$ 7,141	$ 9,170	$ 11,343	$25 / student / year; Startup: 2 months at year 1 cost;
7900	750	Other Personnel Services	$ -	$ 312	$ 633	$ 964	$ 979	$ 993	1.25% of salaries (payroll fees)
		7900 Sub Total	**$ 16,076**	**$ 265,884**	**$ 396,616**	**$ 540,675**	**$ 694,675**	**$ 900,762**	
		Reserve Fund	$ -	$ 23,142	$ 40,089	$ 59,094	$ 76,573	$ 94,668	3% Net FEFP
		Total Expenses	**$ 123,264**	**$ 1,435,824**	**$ 1,964,461**	**$ 2,618,228**	**$ 3,236,149**	**$ 4,137,860**	

Totals

Revenue	**$ 130,000**	**$ 1,453,463**	**$ 1,984,939**	**$ 2,646,923**	**$ 3,272,129**	**$ 4,190,286**
Expenses	**$ 123,264**	**$ 1,435,824**	**$ 1,964,461**	**$ 2,618,228**	**$ 3,236,149**	**$ 4,137,860**
Net Revenue	**$ 6,736**	**$ 17,640**	**$ 20,478**	**$ 28,694**	**$ 35,980**	**$ 52,426**
Cash Balance	**$ 6,736**	**$ 24,376**	**$ 44,854**	**$ 73,548**	**$ 109,528**	**$ 161,954**

Ina A. Colen Academy K-8 - 50% Enrollment

Five Year Staffing Projections

	Year 1	Year 2	Year 3	Year 4	Year 5
Principal	1	1	1	1	1
Assistant Principal	0	0	0	0	1
Classroom Teachers K-5	6	8	10	13	16
Classroom Teachers 6-8	1	2	4	5	6
ESE Teacher/Specialist	0.5	1	1.5	2	2.5
Gifted Teacher	0.5	0.5	0.5	0.5	1
ELL Coordinator/Specialist	0	0.5	1	1	1.5
School Counselor	1	1	1	1	2
Curriculum/Intervention Specialist	1	1	1	1	1
Office Manager	1	1	1	1	1
Registrar/Data Entry	1	1	1	1	1
School Nurse	0	1	1	1	1
Custodian (Day Porter)	1	2	3	3	3
Food Service Workers	1	2	2	2	3
Total Employees	**15**	**22**	**28**	**32.5**	**41**

Attachment Y: Proposed Start-up Budget

Ina A. Colen Academy K-8
Startup Budget Projections
Startup Budget - Marion County

Func	Obj	Description	Plng Year	
Income Estimates				
3720		Financing / Loan Proceeds	$ 130,000.00	Startup and operating loans; Interest only Years 1-5 at 3% interest;
		Total Income	**$ 130,000**	
Expense Estimates				
Function 6100 - Pupil Services				
6100	130	Other Certified Staff Member	$ 12,500	See Staffing Plan; School Counselor Salary $50,000; Startup: 3 mo;
6100	220	FICA	$ 956	7.65% of salaries
6100	240	Worker's Compensation	$ 156	1.25% of salaries
6100	250	Unemployment Compensation	$ 189	2.7% on first $7,000 / employee
6100	641	Furniture, Fixtures-Capitalized	$ 1,500	$1,500 / new staff + $150 /returning staff
6100	750	Other Personnel Services	$ 156	1.25% of salaries (payroll fees)
		6100 Sub Total	**$ 15,458**	
Function 7100 - Board				
7100	310	Professional and Technical Services	$ 5,500	Startup: $5,500;
7100	330	Travel	$ 2,000	Startup: $2,000;
		7100 Sub Total	**$ 7,500**	
Function 7300 - School Administration				
7300	110	Administrator Salaries	$ 47,500	See Staffing Plan; Principal $95,000; Startup: Principal 6 mo.;
7300	160	Other Support Personnel	$ 7,200	See Staffing Plan; Office Manager $15/hr 40hr/wk 52wk/yr; Startup: Office Manager 12 weeks;
7300	220	FICA	$ 4,185	7.65% of salaries
7300	240	Worker's Compensation	$ 684	1.25% of salaries
7300	250	Unemployment Compensation	$ 378	2.7% on first $7,000 / employee
7300	390	Other Purchased Services	$ 15,000	Startup: $15,000;
7300	641	Furniture, Fixtures-Capitalized	$ 3,000	$1,500 / new staff
7300	644	Computer Hardware (Non Capitalized)	$ 1,700	$850 / new staff
7300	750	Other Personnel Services	$ 684	1.25% of salaries (payroll fees)
		7300 Sub Total	**$ 80,330**	
Function 7500 - Fiscal Services				
7500	720	Interest Payment / Debt Service	$ 3,900	3% interest only payments on startup loan
		7500 Sub Total	**$ 3,900**	

Func	Obj	Description	Plng Year	
Function 7900 - Operation of Plant				
7900	320	Insurance and Bond Premiums	$ 2,006	$.75/SF; Year 1 at 75 SF / student; Year 1: 16,050 SF; Startup: 2 months at year 1 cost;
7900	370	Communications	$ 3,000	Year 1: $1,500 / mo; Startup: 2 months at year 1 cost;
7900	380	Public Utilities	$ 2,006	$.75/SF; Year 1 at 75 SF / student; Year 1: 16,050 SF; Startup: 2 months at year 1 cost;
7900	390	Other Purchased Services	$ 5,270	Pest Control, Fire Monitoring etc: $85 / classroom (Classrooms: Year 1: 11); HVAC: $1,000 / year; Inspections: $2,400 / year; Landscape: $0.75 / SF; Contract Custodial: $0.95/SF; (Square Footage: Year 1: 16,050 SF); Startup: 2 months at year 1 cost;
7900	430	Electricity	$ 3,344	$1.25/SF; Year 1 at 75 SF / student; Year 1: 16,050 SF; Startup: 2 months at year 1 cost;
7900	510	Supplies	$ 892	$25 / student / year; Startup: 2 months at year 1 cost;
		7900 Sub Total	**$ 16,518**	

Total Expenses	**$ 123,706**

Totals

Revenue	**$ 130,000**
Expenses	**$ 123,706**
Net Revenue	**$ 6,294**
Cash Balance	**$ 6,294**

Ina A. Colen Academy K-8
Startup Year Cash Flow Projections
Startup Budget - Marion County

Func	Obj	Description	Pln Yr Total	Jan.	Feb.	Mar.	Apr.	May	June
Income Estimates									
		Other Income							
3720		Financing / Loan Proceeds	$ 130,000	$ 130,000	$ -	$ -	$ -	$ -	$ -
		Total Income	**$ 130,000**	**$ 130,000**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
Expense Estimates									
		Function 6100 - Pupil Services							
6100	130	Other Certified Staff Member	$ 12,500	$ -	$ -	$ -	$ 4,167	$ 4,167	$ 4,167
6100	220	FICA	$ 956	$ -	$ -	$ -	$ 319	$ 319	$ 319
6100	240	Worker's Compensation	$ 156	$ -	$ -	$ -	$ 52	$ 52	$ 52
6100	250	Unemployment Compensation	$ 189	$ -	$ -	$ -	$ 113	$ 77	$ -
6100	641	Furniture, Fixtures-Capitalized	$ 1,500	$ -	$ -	$ -	$ 1,500	$ -	$ -
6100	750	Other Personnel Services	$ 156	$ -	$ -	$ -	$ 52	$ 52	$ 52
		6100 Sub Total	**$ 15,458**	**$ -**	**$ -**	**$ -**	**$ 6,202**	**$ 4,666**	**$ 4,590**
		Function 7100 - Board							
7100	310	Professional and Technical Services	$ 5,500	$ 917	$ 917	$ 917	$ 917	$ 917	$ 917
7100	330	Travel	$ 2,000	$ 1,000	$ 200	$ 200	$ 200	$ 200	$ 200
		7100 Sub Total	**$ 7,500**	**$ 1,917**	**$ 1,117**	**$ 1,117**	**$ 1,117**	**$ 1,117**	**$ 1,117**
		Function 7300 - School Administration							
7300	110	Administrator Salaries	$ 47,500	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917	$ 7,917
7300	160	Other Support Personnel	$ 7,200	$ -	$ -	$ -	$ 2,400	$ 2,400	$ 2,400
7300	220	FICA	$ 4,185	$ 606	$ 606	$ 606	$ 789	$ 789	$ 789
7300	240	Worker's Compensation	$ 684	$ 99	$ 99	$ 99	$ 129	$ 129	$ 129
7300	250	Unemployment Compensation	$ 378	$ 189	$ -	$ -	$ 65	$ 65	$ 59
7300	390	Other Purchased Services	$ 15,000	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
7300	641	Furniture, Fixtures-Capitalized	$ 3,000	$ 1,500	$ -	$ -	$ 1,500	$ -	$ -
7300	644	Computer Hardware (Non Capitalized)	$ 1,700	$ 850	$ -	$ -	$ 850	$ -	$ -
7300	750	Other Personnel Services	$ 684	$ 99	$ 99	$ 99	$ 129	$ 129	$ 129
		7300 Sub Total	**$ 80,330**	**$ 13,759**	**$ 11,220**	**$ 11,220**	**$ 16,279**	**$ 13,929**	**$ 13,923**
		Function 7500 - Fiscal Services							
7500	720	Interest Payment / Debt Service	$ 3,900	$ 650	$ 650	$ 650	$ 650	$ 650	$ 650
		7500 Sub Total	**$ 3,900**	**$ 650**	**$ 650**	**$ 650**	**$ 650**	**$ 650**	**$ 650**
		Function 7900 - Operation of Plant							
7900	320	Insurance and Bond Premiums	$ 2,006	$ -	$ -	$ -	$ -	$ 1,003	$ 1,003
7900	370	Communications	$ 3,000	$ -	$ -	$ -	$ -	$ 1,500	$ 1,500
7900	380	Public Utilities	$ 2,006	$ -	$ -	$ -	$ -	$ 1,003	$ 1,003
7900	390	Other Purchased Services	$ 5,270	$ -	$ -	$ -	$ -	$ 2,635	$ 2,635
7900	430	Electricity	$ 3,344	$ -	$ -	$ -	$ -	$ 1,672	$ 1,672
7900	510	Supplies	$ 892	$ -	$ -	$ -	$ -	$ 446	$ 446
		7900 Sub Total	**$ 16,518**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 8,259**	**$ 8,259**
		Total Expenses	**$ 123,706**	**$ 16,326**	**$ 12,987**	**$ 12,987**	**$ 24,247**	**$ 28,620**	**$ 28,538**
Totals									
		Revenue	**$ 130,000**	**$ 130,000**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
		Expenses	**$ 123,706**	**$ 16,326**	**$ 12,987**	**$ 12,987**	**$ 24,247**	**$ 28,620**	**$ 28,538**
		Net Revenue	**$ 6,294**	**$ 113,674**	**$ (12,987)**	**$ (12,987)**	**$ (24,247)**	**$ (28,620)**	**$ (28,538)**
		Cash Balance	**$ 6,294**	**$ 113,674**	**$ 100,687**	**$ 87,700**	**$ 63,453**	**$ 34,833**	**$ 6,294**

Ina A. Colen Academy K-8
BALANCE SHEET
FISCAL YEAR 2021 (STARTUP)

ASSETS

Cash	**6,294**

LIABILITIES AND FUND BALANCE

LIABILITIES	
Accounts Payable	-
FUND BALANCE	
Unrestricted	6,294
Total Liabilities and Fund Balance	**6,294**

Attachment Z: Evidence of External Funding, if Applicable

COLEN FAMILY
CHARITABLE TRUST

January 25, 2020

Dear Board Members of Ina A. Colen Academy:

On behalf of the Colen Family Charitable Trust, it is my pleasure to offer the Ina A. Colen Academy ("IACA") a loan in support of the mission of IACA to cultivate passionate learners in an inclusive school community in which individuality and diversity are valued and students develop understanding and empathy for others through collaboration and active learning. This loan is intended to provide financial support for the Academy to ensure the educational program is implemented to its fullest intent.

The Colen Family Charitable Trust offers the following loan terms to IACA:

- Loan: The Trust will provide a line of credit to cover the proposed shortfall in the amount of up to but not to exceed $1.5 million. In the event student enrollment is below 75% of budgeted projections, the line of credit will be increased to $3 million.

- Term: The term of the Loan will be ten (10) years from the end of the interest only period.

- Repayment: The payment on the loan shall be interest only through the later of instructional year 5 or the instructional year that IACA breaks even. The interest payments shall be made quarterly at an interest rate determined by the Colen Family Charitable Trust but not to exceed 3% per annum. Thereafter, the line of credit will convert to a term loan at an interest rate determined by Colen Family Charitable Trust but not to exceed 3% per annum. The principal and interest payments shall be made quarterly based on a 10-year amortization.

- At the Colen Family Charitable Trust's sole discretion, all or a portion of the Loan may be converted to a grant at any time during the loan term.

The Colen Family Charitable Trust is a not for profit organization whose mission is to create and support educational initiatives that develop passionate learners capable of making the best decisions for themselves and the society in which they live. The Ina A. Colen Academy is a testament to that mission.

Sincerely,

Kenneth D. Colen
Trustee
Colen Family Charitable Trust

8435 SW 80TH STREET | SUITE 2 | OCALA, FL 34481
(O) 352.387.7492 | (C) 352.239.8144

Attachment FF: Applicant's Additional Attachments

Applicant's Additional Attachment FF: Comparison Schools' Data (2018-19 School Year)

All data were retrieved from FLDOE:

- The 20119 School Grades report is the source for proficiency, learning gains, school grades, Title I, and minority student data.
- The K-20 Portal is the source for economically disadvantaged, students with disabilities, English language learners, and total enrollment data.
- The Membership in Programs for Exceptional Students report is the source for district gifted data.

	School Name	% ELA Passing	% ELA Learning Gains	% ELA LGs Lowest 25%	% Mathematics Passing	% Mathematics Learning Gains	% Mathematics LGs Lowest 25%	% Science Achievement	% Social Studies Achievement	%Middle School Acceleration	Grade 2019	Grade 2018	Grade 2017	Grade 2016	Baseline Grade 2015	Title I	% Minority Students	Ec Dis per School Grades	Total K-5 Enrollment*
0651	College Park ES* -48	36	49	59	43	48	33	28			C	D	C	C	C	Y	83.5	100	820
0311	Dr. N.H. Jones ES	91	78	77	93	81	71	90			A	A	A	A	A	N	43.2	34.1	683
0711	Hammett Bowen ES	59	58	52	62	68	53	48			B	C	C	C	B	Y	54.2	79.1	812
0731	Marion Oaks ES* -47	38	51	46	53	59	49	36			C	D	B	D	C	Y	67.8	100	892
0681	Saddlewood ES* -37	59	57	55	70	76	58	47			B	B	B	C	B	Y	60.6	87.5	872
0551	Shady Hill ES	57	58	44	68	71	54	56			B	C	B	C	B	Y	45.4	86.1	639
0571	Sunrise ES* -47 (K-4)	41	43	39	40	49	42				C	D	B	D	D	Y	73.8	100	836
	Average – K-5 Schools	**54**	**56**	**53**	**61**	**65**	**51**	**44**											**5,554**
0051	Howard MS	58	59	50	61	60	48	56	70	83	B	B	B	C	A	Y	68.2	67.7	1,060
0691	Liberty MS	48	54	43	52	58	48	44	75	63	B	C	C	C	C	Y	62.5	64.9	1,277
0361	Osceola MS	61	55	46	69	68	58	65	74	74	A	B	B	B	B	N	37.1	45.9	968
9695	*Ocali Charter MS*	*49*	*50*	*52*	*43*	*49*	*43*	*47*	*74*	*5*	*C*	*C*	*F*	*D*	*D*	*Y*	*53.2*	*79.1*	*141*
	Average – 6-8 Schools	**56**	**56**	**46**	**61**	**62**	**51**	**55**	**73**	**73**							**56**	**60**	**3,305**
	District	**48**	**53**	**44**	**50**	**55**	**44**	**44/44~**	**65^**	**68**	**B**	**B**	**C**	**C**	**B**		**59.63**	**42,941**	

** School includes prekindergarten students; these students were not included in the total K-5 enrollment for comparison purposes; some or all of these are likely children served in the district's PK ESE program, and therefore reflected in the rate of students with disabilities attending the school*

~ 51% is the total for grades five and eight and Biology 1. The district rate for grades five and eight alone was 44%.

^ 70% is the total for Civics and U.S. History. The district rate for Civics alone was 65%.

	School Name	% Economically Disadvantaged*	% Students with Disabilities*	% Gifted Students	% English Language Learners*	Total K-5 Enrollment*	Stability Rate	FRPL Status
0651	College Park ES* -48	72.3	15.6		23.4	820	96.1	100.0
0311	Dr. N.H. Jones ES	20.1	4.4		-	683	99.6	34.1
0711	Hammett Bowen ES	45.3	14.5		9.6	812	98.1	79.1
0731	Marion Oaks ES* -47	63.2	22.0		16.5	892	97.8	100.0
0681	Saddlewood ES* -37	50.0	16.1		10.2	872	97.8	87.5
0551	Shady Hill ES	51.3	12.5		4.4	639	97.2	86.1
0571	Sunrise ES* -47 (K-4)	69.6	12.7		14.6	836	97.8	100.0
	Average – K-5 Schools	**53.11**	**13.97**		**11.24**	**793**	**97.77**	**83.83**
0051	Howard MS	66.4	10.8		3.8	1,060	96.7	67.7
0691	Liberty MS	61.6	13.8		6.7	1,277	97.8	64.9
0361	Osceola MS	43.3	10.8		3.2	968	97.7	45.9
9695	*Ocali Charter MS*	*75.2*	*12.8*		-	*141*		
	Average – 6-8 Schools	**57.1**	**11.8**		**4.57**	**1,102**	**97.4**	**59.5**
	Average – K-8	**54.3**	**13.3**		**9.24**			**76.53**
	District	**63.0**	**15.4**	**5.7**	**5.5**			
	State		**14.1**	**6.1**	**10.2**			