

Florida Charter School Application Evaluation Instrument

Imagine Charter School at North Port

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

The following definitions should guide the ratings:

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

OVERALL ASSESSMENT – COMPLETE THIS SECTION LAST

General comments:

This application is very comprehensive and clearly-written. The Charter Review Committee feels that the applicant fully met 12 of the 19 criteria and partially met the remaining 7. The description of the educational program, curriculum and assessment is complete and offers a different approach for students in Sarasota County. The organizational structure is confusing since the applicant states that they are not working with an Educational Service Provider and yet agreements and discussions indicate that Imagine Schools is providing some service that would be defined as such. With significant resources going to that entity, the relationship and services need to be clearly articulated. Some confusion is also evident in the reporting relationship of the principal to someone other than the governing board.

The applicant has secured a site for their school and has a reasonable plan for being able to open their school on time. However, the application does not indicate that they have received zoning and other required approvals.

It is recommended that the applicant provide more detail in several sections of the document.

I. Educational Plan

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

1. Mission, Guiding Principles and Purpose

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

Statutory References:

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
The applicant clearly documents its purpose and values. It is comprehensive in its description of its overall direction and methodologies.	
The approach of project CHILD (Changing How Instruction for Learning is Delivered) is not used in the district so it definitely offers a model that is unique. Offering alternative delivery methods is one of the stated objectives of Florida Charter School statutes.	
Concerns and Additional Questions	Reference

2. Target Population and Student Body

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

- An understanding of the students the charter school intends to serve.
- A manageable plan tied to enrollment projections that will allow the school to meet its constitutional class size obligations.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
The grade levels and location of the school are clearly articulated. The location of the school in the North Port area specifically targets students in overcrowded schools. This is an objective of Florida Charter School Statutes.	

Concerns and Additional Questions	Reference
The applicant should clearly identify how it will recruit students from the proposed geographic area and how it will ensure serving a diverse population.	

Applicant Response:

As stated on page 97 of our application, we will recruit through an extensive public information campaign that provides widespread notification throughout all segments of the community. This will include direct mailings, public advertisement the local and community press and informational meetings at a variety of locations using both English and Spanish where appropriate. All of these media will be selected with an eye toward ensuring that our demographic represents a racial/ethnic balance reflective of the community. For example, we will strive to hold public informational meetings in a variety of diverse locations that will be as welcoming as possible to the different racial/ethnic groups throughout the community.

3. Educational Program Design

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

Statutory Reference(s):

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

Evaluation Criteria:

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

- Is clear and coherent;

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
Well written; each criterion is addressed and there is sufficient detail to explain the educational practices, teaching methods and high standards for student learning.	

Concerns and Additional Questions	Reference
The Sample Day Schedule on page 19 raises the question of how they will fit any special other than the required PE into the day.	Page 19
The application includes visual art and music in its plan but it is not clear that there will be time in the day for it.	

Applicant Response:

The Project CHILD instructional model provides time and opportunities for the integration of Visual Arts and Music throughout the standard school curriculum. Our vision is that by infusing arts throughout the curriculum, students will be provided with ongoing opportunities to enhance learning, develop talents and abilities, and gain an appreciation for the role of the arts in and beyond the school walls. Three ways in which Imagine Charter School in North Port will specifically ensure the integration of the arts in the CHILD Learning Blocks Schedule include:

- **Dedicated time within the daily schedule**
The CHILD Daily Learning Blocks schedule provides for Specials, which will include the required 150 minutes of Physical Education each week, and an additional 50 minutes of instruction in the Arts each week. Students will also engage in a variety of experiences through arts infusion and station activities each day.
- **Arts infusion through interdisciplinary thematic units of instruction**
The infusion of Visual Arts through interdisciplinary thematic units will generate enthusiasm for the arts as well as for different cultural and historical connections. Infusion allows for the exploration of various artists, art processes and art experiences all linked to the content of each unit, providing a seamless opportunity for making relevant connections across the curriculum.
- **Dedicated CHILD Stations for Visual Arts and Music integration**

Imagine Schools Standards-based curriculum provides Visual Arts and Music standards correlated with Sunshine State Standards for all grade levels. These standards will be the focus of a Station during Writing/Social Studies and Mathematics/Science instruction at each grade level. Once the Arts standards have been introduced and taught, students will engage in hands-on activities to support and apply their learning at these stations throughout the implementation of each interdisciplinary unit of instruction.

Example of arts infusion at one grade level:

Fourth grade students will explore the overarching theme of systems throughout the year. Below is an example of ways Music and the Visual Arts would be infused into one interdisciplinary unit related to this theme:

Sampling of Arts Infusion Across the Curriculum <u>Grade 4 Theme: Systems</u> <i>Thematic Unit: Exploring the similarities and differences of various ecosystems across space and time</i>	
Mathematics and Science Block • Students study and analyze various geometric shapes found in nature • Students create 2 and 3-D art representations of various ecosystems using • A variety of media (pencil, water color, chalk, etc.) • Students recognize prominent art works representing nature/environment • Students study and replicate ways animals are portrayed through art and music • Students recognize various compositions representing natural environments • Students compose original songs to teach others about specific ecosystem • Students create art works from natural materials • Students study ways in which math and music are related	Writing and Social Studies Block • Students write and illustrate original books based on studies of various ecosystems • Students learn about the arts of various cultures that inhabited ecosystems, past and present • Students write and compose original songs to teach concepts of various ecosystems • Students study and replicate ways animals are portrayed in art throughout history • Students listen to various compositions by noted musicians and artists and respond in writing • Students study the geography of various ecosystems and portray understanding through various media • Students compare and contrast various art genres portraying ecosystems

4. Curriculum Plan

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

Statutory Reference(s):

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

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

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

- Will be appropriate for all students at all levels.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Final X ☐	X ☐	☐

Strengths	Reference
Comments: ▪ <i>Provides a clear and coherent framework for teaching and learning</i> +There is a Comprehensive Reading Plan that details the reading program and clearly articulates that reading is a school-wide focus. There is also a discussion of the leadership for literacy (school literacy team). +There is a description of the mechanisms for delivering the 5 essential components of reading and a clear description of the reading block for all grade levels and achievement levels of students. There is clear explanation of the use of Project CHILD. This program is an <i>organizational structure</i>, not a curriculum. There is mention of the E. D. Hirsch curriculum, but it isn't clear what the context of that curriculum will be—arts? basic skills? There is indication that a core reading program (approved by the Florida Center for Reading Research) will be selected by the principal and staff. Imagine schools in other districts in Florida have clearly delineated curriculum—some that focus on advanced/college preparatory curriculum, some on infusing arts in the curriculum, etc. There is a need to be more specific about what the actual focus of the curriculum plan will be here in Sarasota. ▪ <i>Will enable all students to attain Sunshine State Standards and receive a year's work of learning for each year enrolled</i> In order to attain the Sunshine State Standards, students will need to have specific experiences with hands-on science activities beyond “centers.”	

Concerns and Additional Questions	Reference
The schedule provided does not make it clear when and how “specials” in art or music will be available to students (only daily physical education is mentioned). The Sarasota community places a high value on the arts, so these areas need to be more specifically addressed.	

Applicant Response:

- **As stated above, the Charter School will integrate art and music throughout the standard school curriculum, to develop intellectual and communication skills in children through active participation in the arts, and to enhance appreciation for culture and art within children. Our vision is that by infusing Arts into the curriculum, we enhance the opportunities for academic success for all students.**

Final committee response: With clarification, standard has been met.

5. Student Performance, Assessment and Evaluation

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
Comprehensive and detailed response.	

Concerns and Additional Questions	Reference
One minor suggestion: A more narrow focus on how assessments, (formative assessments) are used to monitor student progress and modify instruction would strengthen this section.	pp. 51-53

6. Exceptional Students

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

Statutory Reference(s):
s. 1002.33(16)(a)(3)

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
Adequately addresses supports and services for ESE students.	Pgs 57-65

Concerns and Additional Questions	Reference
Applicant should include job descriptions for ESE teachers and add ESE teacher to the organizational chart.	

Applicant Response:

- **The ESE teacher is considered a support position that assists students, parents, staff and the Principal. As such, the position is included in the Support box of the Organizational Chart.**
- **The ESE job description is listed below:**

IMAGINE SCHOOLS WEST FLORIDA REGION

ESE Teacher **JOB DESCRIPTION**

QUALIFICATIONS:

1. Master's Degree from an accredited educational institution.
2. Certification in ESE

KNOWLEDGE, SKILLS AND ABILITIES:

- Basic understanding of ESE students and their disabilities.
- Knowledge of staffing requirements into ESE programs.
- Knowledge of local, state and federal ESE guidelines.
- Ability to interface with school personnel and parents.
- Knowledge of curriculum scheduling and programming for ESE.
- Knowledge of Individual Education Plan (IEP) production and follow through.

REPORTS TO: Principal or designee

Job Goal- To assure identification, program development, placement, and educational services of exceptional education students are in accordance with local, state and federal guidelines.

SUPERVISES:

N/A

PERFORMANCE RESPONSIBILITIES:

1. Serve as a Charter School representative at ESE staffings.
2. Provide services to regular staff members who work with mainstreamed ESE students.
3. Provide assistance and information to parents of ESE students.
4. Provide Crisis Intervention Services to all ESE staff and students as needed.
5. Serve as a resource to the guidance department when needed.
6. Provide classroom observation for students being considered for ESE placement.
7. Conduct the staffing process and ensure that required procedures and documentation are fulfilled.
8. Use effective student behavior management techniques.
9. Develop effective assessment strategies to assist the continuous

development of students.

10. Interpret data for diagnosis, instructional planning and program evaluation.
11. Establish appropriate testing environment and test security.
12. Apply principles of learning and effective teaching in instructional delivery.
13. Use a multimedia approach utilizing a variety of materials and equipment to meet the needs of students.
14. Provide a positive environment in which students are encouraged to be actively engaged in the learning process.
15. Communicate effectively, both orally and in writing, with other professionals, students, parents and the community.
16. Coordinate articulation between departments, schools and/or agencies for ESE students.
17. Coordinate ESE transportation for the school site.
18. Maintain accurate ESE records for auditing purposes.
19. Schedule and conduct student eligibility staffings.
20. Schedule and conduct initial IEP/placement meetings.
21. Assist with FTE process and data collection.
22. Assist with scheduling of ESE students.
23. Transition incoming ESE transfer students.
24. Assist with parent-teacher conferences as requested.
25. Facilitate the referral of students for medical or psychiatric evaluation.
26. Orient new teachers to ESE curriculum, classroom management and IEP development.
27. Provide direction for inservice and training necessary for ESE Programs.
28. Establish short- and long-range goals based on student needs and School and state curriculum requirements.

TERMS OF EMPLOYMENT:

Salary and benefits shall be paid consistent with the School's approved compensation plan.

Length of the work year and hours of employment shall be those established by the School.

EVALUATION:

Performance of this job will be evaluated in accordance with provisions of the Imagine School's policy on evaluation of personnel.

7. English Language Learners

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
Imagine School establishes a clear screening procedure based on the Florida Consent Decree using the Home Language Survey. ICS demonstrates knowledge of teacher qualifications; as well as ESOL curricular needs of ELLs to be equal in scope, sequence and quality to regular core curriculum offered to all students, as stated by ICS. This is in accordance to Florida Consent Decree Agreement. There is an apparent willingness to “service ELLs in a timely and appropriate manner”. ICS demonstrates the mandate of establishing and maintaining a LEP Student Plan as required by the Florida Consent Decree. ICS does not mention in their application literature the Sarasota County Schools District LEP Plan. ICS establishes an Inclusion Model as their primary methodology for ELLs. This model requires highly qualified teachers that are ESOL certified or ESOL endorsed to service ELL students in the classroom. ICS will have a large elementary population that requires ESOL certified or endorsed teachers, therefore employing and maintaining highly qualified teachers to service their ELL population might be an issue.	Page 62

Concerns and Additional Questions	Reference
A recommendation is that they become familiar with the Sarasota County Schools LEP Plan and follow it if they are approved.	

Applicant Response:

District LEP Plan

- The Charter School will follow the district's LEP Plan that includes [Identification](#), [Assessment](#), [Comprehensive Program Requirements and Student Instruction](#), [Exit Criteria and Procedures](#), [Monitoring Procedures](#), [Parent/Guardian/Student Notification and Rights](#), [Functions of the LEP Committee](#) and [Personnel Training](#)

8. School Climate and Discipline

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

- A school calendar and schedule that meets the minimum statutory requirements.
- An approach to student discipline that creates and sustains a safe and orderly learning environment.
- Legally sound policies for student discipline, suspension, dismissal and recommendation for expulsion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
The application clearly and comprehensively meets the criteria.	
District procedures are evident in the application.	

Concerns and Additional Questions	Reference

II. Organizational Plan

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

9. Governance

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

Statutory Reference(s):

s. 1002.33(7)(a)(15); s. 1002.33(16)(5)(b)

Evaluation Criteria:

A response that meets the standard will present:

- Documentation of proper legal structure of the governing board.
- Adequate policies and procedures for board operation.
- Evidence that the proposed governing board will contribute to the wide range of knowledge and skill needed to oversee a charter school.
- A clear, sensible delineation of roles and responsibilities in relation to governance and school management.
- A plan for the meaningful involvement of parents and the community in the governance of the school.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Final X ☐	X ☐	☐

Strengths	Reference
The application clearly states that the governing board sets policies and follows statutory guidelines for boards.	

Concerns and Additional Questions	Reference
The organization is confusing when it contains governing board members that are part of the managing organization. While the application states that founding board members will be replaced by local persons, the documents describing the governing board seem to indicate that a majority (3 of 5) board members will be appointed by the organization based in Virginia. The “arm’s length relationship” with the “consultant” would be difficult to maintain. Roles are clearly defined but, again, the practical operation of the organization is difficult to understand. The application states that the governing board would meet quarterly. This would allow for minimal access to the board by	

parents and community members. The autonomy of the school is stated in terms of managing financial matters but when the Principal is hired and reports to a group other than the Board, it is difficult to see how autonomy is possible. The school, if approved, would start with a minimal debt of \$250,000 plus capital advances plus building costs. Those costs are pre-determined and could put the school in a difficult financial position. It appears that the governing board should have some discretion in how the school is built and what level of debt it would deem appropriate to fulfill its role in financial oversight.	
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Applicant Response:

- Perhaps the best example we can give to try to clarify our governance structure is to point to non-profit organizations like the YMCA or the Boy Scouts of America. Local chapters of these organizations are governed by local boards of directors, but each local organization is guided by the principles and values established by the national organization and supported by the national expertise and resources of these organizations.
- It is important to understand that Imagine Schools, as a fundamental part of its Shared Values, is a highly decentralized organization that expects and requires that all governance decisions be made by the Board of Imagine Charter School at North Port. Pursuant to IRS requirement for derivative exempt status, the Board members are formally appointed by Imagine Schools Non-Profit; however, the actual nomination/selection of Board members will be made by local Imagine Schools employees, parents and community members based upon the individual qualifications of interested community members. Only after Board members are identified locally, are their names submitted to Imagine Schools Non-Profit for their formal appointment. For example, , all five of the current founding board members were identified as community members who expressed interest in school choice in Sarasota County and who bring experience and expertise in finance, education, law and business. The two Board members on the founding board who are currently employed by Imagine (Karl Huber and Robert Connor) were chosen for their extensive experience in law, finance, development, education and school administration. They are both local community members and if their Imagine Schools responsibilities were to change and result in a potential conflict of interest in their relationship to the School(i.e. if Robert Connor were selected as the Principal), they would immediately resign from the Board.
- As stated in our application, Board meetings will be held not less than quarterly. Publicly noticed meetings of the Board are usually held every four to six weeks in

the formative years. However, once the school is well established and operating smoothly, Board meeting are typically held quarterly unless local circumstances indicate that more frequent meetings are necessary or appropriate.

Final Committee response: With clarification, standard is met. However, it is recommended that the school monitor the need for more frequent board meetings to allow for easy parental/public access. In addition, the “arms length” relationship with the parent organization needs to be consistently monitored for appropriateness.

10. Management

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meet the Standard	Partially Meets the Standard	Does Not Meet the Standard
Final X ☐	X ☐	☐

Strengths	Reference
Good Job descriptions.	

Concerns and Additional Questions	Reference
While the application states that the Principal is responsible for the day-to-day activities of the school, there appears to be potential for conflict when the principal does not report to the governing board. If the day-to-day- supervision of the Principal is provided by personnel from the management company, the organization may promote conflict when priorities of the board are different than those of the management company.	

Applicant Response:

- It is important to emphasize that Imagine Schools Non-Profit is not the management company, but the sole member of the LLC. The LLC Operating Agreement (Appendix A) is not a third party services agreement but essentially the by-laws of the LLC, which establishes the rules for internal governance of the LLC.
- The Principal reports to and is accountable to the Board for the successful operation of the school pursuant to the terms of the charter. In addition, the Principal is supervised and mentored by the Regional Vice President as part of the administrative oversight that ISNP provides to its LLCs. As stated in the Operating Agreement (Appendix A, 7.6), the duties of the Principal are as follows: “The principal shall have general charge of all operating functions and activities of the LLC, and shall be charged with carrying out the policies, programs, orders, and resolutions of the Board of Managers.” The Regional Vice President selects the principal, with approval from the Board, supervises, supports and evaluates the Principal’s performance as it relates to the general charge of all operating functions and activities of the School, in compliance with the directives of the Board, the terms of the charter granted by the Sarasota School District and laws of the State of Florida.

Final Committee response: With clarification, standard is met.

11. Education Service Providers

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Not Applicable	Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
☐	Final X ☐	X ☐	☐

Strengths	Reference

Concerns and Additional Questions	Reference
While the applicant asserts throughout the application that Imagine Schools is NOT an ESP, there is every indication that the services provided meet the definition of an ESP.	
The agreements included in the Appendices clearly indicate that Imagine School's relationship with the school is more than "advisory" as stated on page 85. With 12% of the state and federal revenues going to Imagine Schools, the services to be provided for that fee should be clearly stated.	Page 85
The statement in the application on page 91 that "the existing debt on Imagine Schools acquired when Imagine merged with Chancellor Beacon Academies in June, 2004 has been restructured to ensure a recovery plan that's been positively cited by a third party auditor" needs to be more fully discussed.	Page 91

Applicant Response:

- **Imagine Schools indirect cost of 12% provides the following relationships and services to the LLC and School as expressed by Imagine's mission statement.**

The purpose of Imagine Schools Non Profit is to assist parents in providing a quality education for their children. Undergirding this purpose are three shared values that guide our work; integrity, justice and fun. These shared values guide our behaviors in everything we undertake. Our goal is to positively impact parent satisfaction, economic sustainability, academic achievement, positive character development, and new school development nationally. Below, please find a small sample of some of the expertise we have within Imagine Schools Non Profit and that is provided to our schools as needed:

Staff and Teacher Recruitment:

- **Coordinate national search, interviews, and selection for school-site principals and regional personnel**
- **Coordinate school-site identification of open positions and assist in filling open positions through Imagine Schools Website**

- Provide teacher recruitment software (BrassRing) for identification of potential personnel
- Coordinate region support with Employee Job Fairs
- Advertise in Education Week for leadership positions
- Coordination of a teacher recruitment fair to recruit teachers for school sites

Support Management:

- Coordinate weekly principals conference calls for sharing best practices, compliance updates, identify school-site needs, and share region and national Imagine Schools initiatives
- Coordinate Principal and region performance planning in support of Imagine Schools shared values, mid-year performance reviews, and final performance evaluations
- Coordinate Annual School of Excellence Program Reviews consisting of Imagine Schools team members throughout the country. These are three day on-site reviews with an exit report provided to the Faculties and Governing Boards at each location
- Support and advise school sites on all operational needs with operation guidelines
- Assist in completing and accessing school site private, state and federal grants
- Assist in the development of school site marketing strategies
- Interpret issues related to state & legislative code
- Provide direction and guidance in completing reports required by the U.S. Department of Education, Florida Department of Education and the authorizer

Compliance:

- Assist in charter school district renewal documentation
- Assist in developing charter school annual reports
- Assist school sites with all compliance related needs (i.e. local, state and federal)

Professional Development and Supervision:

- Design and coordinate ‘School of Excellence Program Reviews’ and site visits to determine professional development needs, and regional and national initiatives
- Coordinate all student assessment and accountability requirements
- Provide interpretation and evaluation of student assessment results in a variety of formats
- Consult with each principal on the assessment results and objectives for School Improvement Planning
- Coordinate and design Imagine Schools ‘Growing our Leaders’ Program
- Coordinate school site needs assessment

- Coordinate school site curriculum alignment to the Florida Sunshine State Standards
- Coordinate region educational activities
- Coordinate Professional Development Teacher In-service Activities
- Update principals on Department of Education Technical Assistance Notices
- Develop additional National Standards to the curriculum in the areas of Character Education and Finance
- Coordinate school-wide scope and sequence in core content areas
- Develop the FCAT Action Plan and pacing guides for school-wide success in core content areas
- Provide a National Imagine Schools Summer Education Symposium to share best practices, strategies and goals for School Achievement
- Provide an annual National Boot Camp for all new Imagine Schools Principals to enhance leadership skills
- Ensure 'No Child Left Behind' mandates are implemented within all schools

Benefit Management:

- Bid nationally and identify providers for health, dental, vision, life, short/long term disability, and supplemental insurance
- Procurement and administration of 401K retirement program.
- Provide Imagine People's Procedures Manual consisting of all compliance regulations and human resources forms

School Development:

- Coordinate new school development, expansion and Charter applications and amendments
- Conduct feasibility studies and cost analysis for the expansion of school sites in compliance with class size reductions
- Serve as liaison between governing board, architect and builder
- Serve as liaison to construction arm of company
- Provide resources to assess demographic growth needs
- Communicate school development plans with school district and state
- Communicate with local planning, zoning, and permitting requirements

Lease Admin Facility/Equipment Procurement:

- Provide oversight of leases for buildings and equipment
- Identify sites and equipment inventories
- Coordinate financing for facilities and equipment
- Provide legal counsel review of contracts

General Administration:

- Lend administrative support to all schools and region personnel through communications and document preparation
- Receive and address customer needs, parental and employee concerns

- Assist Imagine LLCs with liaison between the School and school districts and the State
- Serve as liaison between school districts and Imagine Schools when necessary
- Assist Imagine LLCs with liaison between school site and all Imagine Schools support services

Financial:

- Provide support and assistance if needed to the Imagine LLCs in the development of:
 1. Monthly District Reports
 2. Monthly Budget vs. Actual
 3. Monthly Trial Balance
 4. Monthly General Ledger Detail
 5. Monthly Balance Sheet
 6. Governing Board financials
- Prepare RFP's for year-end audit if needed
- Assist the school site financial task force if needed in the preparation of the preliminary, final, and revised annual budgets
- Coordinate pre-audit compliance if needed
- Assist auditors at school sites during year-end audits if needed
- Assist school sites with MAS 500 usage to complete tasks
- Approve all journal entries if needed
- Serve as liaison between the schools, District finance office, and Governing Boards if needed

Legal Services:

- Provide legal counsel for school site needs, questions and potential lawsuits
- Provide legal counsel for advise on student, parent, and personnel issues
- Provide legal counsel for contract development (i.e. consultants, vendors)

Insurance:

- Bid nationally and identify provider for Workman's Comp, General Liability, and Property to provide for an umbrella policy which affords lower premiums for schools
- Serve as liaison between insurance carrier and school site
- Coordinate pre-paid options for schools
- Represent school sites on pending claims with the individual insurance carriers

IT (Corporate and Instructional Technology):

- Provide and maintain a national website and server that allows for Imagine Schools communications
- Administer access to users and establishes user access levels

- Coordinate school site use of STI (Software Technology Incorporated- An Education Data Management Solution) for site-based management of student data
- Provide IT consultation services for Imagine Schools sites

Contingency:

- Provide Imagine Schools LLCs with contingency support for financial, situational, new school start-up and personnel needs

Assessment:

- Provide services for TerraNova and/or Stanford products test administration and scoring
- Provide individual/class/school assessment reports
- Generate assessment reports within five days – Imagine Schools is the only private company authorized to scan and score reports for the Terra Nova, SAT-9, SAT-10, and the SDRT
- Identify instructional needs and school improvement planning through data analysis
- Disseminate Student Learning Priorities Report based on school wide standardized test results
- Develop, administer, score, and report on teacher, parent, and student Annual School Climate Surveys
- Develop, administer, and report on the Imagine Schools Annual Shared Values Survey
- Develop, administer, and report on the Imagine Schools Character Education Survey

Governance Support:

- Provide direct support to LLC governing boards on required reports, compliance and accountability needs

Final committee response: With clarification, standard is met.

12. Employment

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

- A compensation plan that will attract and retain quality staff.
- Policies and procedures that hold staff to high professional standards.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Final X ☐	X ☐	☐

Strengths	Reference
Job descriptions are included.	

Concerns and Additional Questions	Reference
Sexual orientation is not included in the Harassment policy. The Code of Ethics and the Principals of Professional conduct of the Education Profession in Florida need to be added. There is no equity policy or appeals process for employee discipline. Policies for principal and teacher evaluations need to make sure they cover all statutory requirements.	

Applicant Response:

- **Our People Policies Handbook (Appendix E) is for national circulation and includes all legal categories recognized by Federal law for protection from discrimination and harassment. Sexual Orientation is not listed since it is not a legal category protected under Federal law. With respect to our no harassment policies, our handbook specifically lists all of the Federally recognized categories and “any other categories protected by state or local law” (Appendix E, page 5). While it is our understanding that sexual orientation is not a legally recognized category protected by the State of Florida, Sarasota County or City of North Port laws or ordinances, we have no intention of implying by the omission that we would tolerate harassment of any kind related to sexual orientation.**
- **All employees are provided a copy of the Code of Ethics and the Principals of Professional Conduct of the Education Profession during the orientation period each year.**
- **As stated on page 93, Hiring and Dismissal, “We expressly reserve the right to discharge employees after exhausting an internal due process hearing. We will include in the employment contract thorough, consistent and even-handed termination provisions that include appropriate due process procedures.” Principals receive professional inservice on counseling employees and providing due process for corrective actions and/or decisions impacting wages and/or conditions of employment. Employees’ rights to appeal a principal’s decision are provided by the Principal and the appeal hearings are conducted by the Imagine Schools Region Vice President as Level 1, and the Executive Vice President as Level 2. Employees are also apprised of their right to appeal to the Imagine Charter School LLC.**

Final Committee response: With clarification, standard is met.

13. Parent and Community Support and Partnerships

The Parent and Community Support and Partnerships section should describe how parents and the community will be engaged in the operations of the school.

Evaluation Criteria:

A response that meets the standard will present:

- Meaningful partnerships with parents and the community that further the school's mission and programs.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Final X ☐	X ☐	☐

Strengths	Reference

Concerns and Additional Questions	Reference
While adequate, this section could be more specific and detailed. Of special consideration is the fact that the school anticipates only quarterly board meetings.	

Applicant Response:

- As stated in our application, the Board meetings will be held not less than quarterly. Publicly noticed meetings of the Board are usually held every 4-6 weeks in the formative years. However, once the school is well established and operating smoothly, Board meeting are typically held quarterly unless local circumstances indicate that more frequent meetings are necessary or appropriate. Meetings are advertised in the parent newsletter, school website, and publicly posted., Contact information for the board members are provided to parents and staff.

Final Committee response: With clarification, standard is met.

14. Student Recruitment and Enrollment

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
The application clearly defines the recruitment plan and admission process.	
Projected enrollment of 403 students in the first year seems realistic.	

Concerns and Additional Questions	Reference
The school needs to be clear on how it will recruit a diverse population.	

III. Business Plan

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

15. Facilities

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
There is an existing building targeted for siting the school.	

Concerns and Additional Questions	Reference
The application presents a proposed 36,000 square foot building with a lease of \$21 per foot. The lease expectation for the school needs to be clarified if that is a monthly or annual lease fee since it is difficult to ascertain in the budget. There is question about whether the site planned by the school is properly zoned for a school and, if not, what plan is in place? Traffic issues in the area of the proposed site need to be evaluated more fully.	

Applicant Response:

- **The lease will be paid monthly.**
- **The property we have selected is properly zoned for a charter school. The only permitting required will be the submittal of a site plan modification to address the necessary modifications to the parking and traffic patterns to accommodate the**

school. This is an administrative process which North Port planning officials indicate typically takes 6-8 weeks to complete. If traffic studies are required by the City of North Port the owner of the property will comply with this requirement.

Final Committee response: Standard is met. Verbal clarification of the lease has stated that the lease cost will escalate as more of the building is occupied. The eventual base monthly lease will approximate \$63,000.

16. Transportation and Food Service

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

- A transportation plan that will serve all eligible students.
- A food service plan that will serve all eligible students.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Final X ☒	X ☐	☐

Strengths	Reference
The application details the school's plan for food service.	

Concerns and Additional Questions	Reference
The applicant states that the school will encourage parents to drive their children to school. There are many reasons that this approach should be evaluated more completely. The transportation plan states that it is based upon funding provided by the state. This funding is typically not adequate to meet the needs of the student body. The plan for transportation needs to be more completely worked to determine if it is realistic.	Page 105

Applicant Response:

- Although our conversations with Sarasota School District staff seems to indicate that transportation services may be available from the school district, our base case transportation plan assumes that we would purchase school buses and operate them for the transport of children to and from the school.
- Our budget assumes that state funding will not be sufficient to cover the full cost of transportation. Based upon our experience elsewhere in Florida, the budget we submitted in our application assumes that the revenue we receive for such transportation will cover only a portion of the cost of transporting the students. The rest of the cost is covered by our other revenues as part of our operating costs. In the event that the costs for contracting with the Sarasota School District exceed our costs to purchase and operate our own buses, then we would operate our own transportation. Furthermore, if the actual cost of transportation exceeds our estimates, we are confident that we have built enough conservatism into our budget to accommodate these increased costs.
- The revision to the transportation policy we provided to you earlier this week, for transporting kindergarten students living more than 1 mile away and students living beyond 4 miles from the school, should not cause a significant impact on the school's budget. In addition, we will provide transportation to any handicapped students or pregnant mothers as required by law.

Final Committee response: With clarification, standard is met.

17. Budget

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
The budget MAY have an underprojection of revenues. If that is the case, there would be more reserve at the school.	

Concerns and Additional Questions	Reference

Final Committee response: Revised budget submitted to reflect student number corrections.

18. Financial Management and Oversight

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

Statutory Reference(s):

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

Evaluation Criteria:

A response that meets the standard will present:

- A fiscal management system that is appropriate, follows generally accepted accounting principles and properly safeguards assets.
- Evidence of proper insurance coverage.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
The proposal meets the requirements for financial management and oversight. There is indication of very good internal controls. While the ESP is stated to provide assistance and some internal controls, management of the funds remain at the school.	

Concerns and Additional Questions	Reference

19. Action Plan

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

Statutory Reference(s):

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

Evaluation Criteria:

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

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

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X ☐	☐	☐

Strengths	Reference
The action plan is concise and yet comprehensive.	

Concerns and Additional Questions	Reference