

MODEL FLORIDA CHARTER SCHOOL APPLICATION

Proposed Start-up Charter School:
NAPLES CLASSICAL ACADEMY

Submitted by:
PHOENIX EDUCATION NETWORK, INC.

Submitted to:
District School Board of Collier County
Office of Charter Schools
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APPLICATION COVER SHEET

NAME OF PROPOSED CHARTER SCHOOL: Naples Classical Academy

NAME OF NON-PROFIT ORGANIZATION/MUNICIPALITY UNDER WHICH CHARTER WILL BE ORGANIZED OR OPERATED: Phoenix Education Network

If a non-profit organization, has it been incorporated with Florida's Secretary of State? Yes

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

NAME OF CONTACT PERSON: Erika Donalds

TITLE/RELATIONSHIP TO NON-PROFIT: Executive Director

MAILING ADDRESS: 15275 Collier Blvd #201-299, Naples, FL 34119

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Names, roles, and current employment of all persons on applicant group, i.e. anyone with a role in drafting the substantive content of this application or expected to have a significant role with the school, including any consultants or employees of an Education Service Provider. Add lines as necessary.

Full Name	Current Job Title & Employer	Role with Proposed School
Matthew Mathias	President & CEO, MWM Investment Consulting, LLC	Governing Board Chair
Erika Donalds	President & CEO, The Optima Foundation	Executive Director; CEO of the Education Service Provider
Chuck Marshall	Consultant, Self-Employed	Consultant

Projected Date of School Opening (Month/Year): August 2020

Do any of the following describe your organization, or the school proposed in this application?

☐ Seeks approval to convert an already existing public school to charter status. (*Applicant must attach as Attachment A evidence of compliance with the voting requirements set forth in section 1002.33(3)(b), F.S.*)

☐ Will be a charter school-in-the-workplace pursuant to section 1002.33(15), F.S.

☐ Will be a charter school-in-a-municipality pursuant to section 1002.33(15), F.S.

☐ Will be a charter school in a development pursuant to section 1002.33(10)(e)7., F.S.

☒ Will contract or partner with an Education Service Provider (ESP). (*See definition of an ESP in the Addendum, which applicant must complete if using an ESP.*) If yes, include the provider's portfolio in answering the questions below regarding pending applications and school openings.

Name of ESP: The Optima Foundation, Inc.,

☐ Seeks approval to replicate an existing school model. (*See definition of a replication in the Addendum, which applicant must complete if replicating a school model.*)

☐ Seeks approval to replicate an existing High Performing Charter school model pursuant to section 1002.331, F.S.. (*Applicant must complete Addendum A1.*)

Does the applicant group have one or more charter school applications under consideration by any other authorizer(s) in the United States or intend to apply for one or more charter school applications to open in

the upcoming school year other than the one presented here? ____Yes ____X>No If yes, complete the table below (add lines as necessary).

State	Authorizer	Proposed School Name	Application Due Date	Decision Date

Does this applicant group have approved applications for schools or campuses scheduled to open in the United States in the future? ____Yes ____X>No If yes, complete the table below (add lines as necessary).

Planned School Name	Authorizer	City, State	Opening Date

Does this applicant group operate schools or campuses in Florida or elsewhere in the United States? ____Yes ____X>No If yes, complete DOE Form IEPC-M1A which can be found at <http://www.fl DOE.org/schools/school-choice/charter-schools/charter-school-reference>, and include as Attachment DD.

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

Signature

Title

Printed Name

Date

EXECUTIVE SUMMARY

Phoenix Education Network plans to open a kindergarten through 12th-grade school in affiliation with the Hillsdale College Barney Charter School Initiative (BCSI) called Naples Classical Academy (NCA). The mission of NCA is to train the minds and improve the hearts of young people through a content-rich classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue. Our vision is to have a citizenry worthy of the legacy of our country's founders and the continuation of our American experiment, through a classical, great-books curriculum designed to engage the student in the highest matters and the deepest questions of truth, justice, virtue, and beauty.

To achieve our mission, NCA will emphasize an education in the humanities, the sciences, and the arts in several current and research-based curricula and programs in the elementary and middle schools, which include:

- The Core Knowledge Sequence (a specific, grade-by-grade core curriculum of common learning)
- Riggs Institute's *The Writing & Spelling Road to Reading & Thinking* as supplemented by content from Access Literacy, LLC (for teaching "explicit" phonics, reading, and language arts)
- Singapore Math (a conceptual approach to mathematical skill building and problem solving)

In high school, NCA will follow the BCSI course sequence. This includes four and a half years of history; four years of literature, math, and science; three years of foreign language; one year of composition, and a semester each of government, economics, and moral philosophy.

NCA's goal is to produce students who communicate effectively, are virtuous, possess cultural literacy, and are active and productive members of American society. To accomplish this, we propose to use time-honored instructional methods. These methods are the cornerstone of classical education and support mastery of the state standards. They are as follows:

- | | |
|--|--|
| • <i>Explicit and Systematic Phonics Instruction</i> | • <i>Utilization of Primary Source Documents</i> |
| • <i>Explicit English Grammar Instruction</i> | • <i>Teaching of Study Skills</i> |
| • <i>Ability Groupings</i> | • <i>The Socratic method</i> |

NCA's first year will begin with kindergarten through sixth grade. Students will, over time advance through Grade 12, and NCA will continue as a K to 12 institution. Enrollment will be open to any student eligible to attend Collier County Public Schools (CCPS). NCA's curriculum and program was selected specifically to meet the needs of all types of learners, and we expect a population of students from diverse backgrounds and with diverse learning abilities. Our curriculum is time-tested and research-based, and has been successfully implemented for students from academically, socially, and economically varied backgrounds.

Many Collier County students and families do not currently have a public-school classical curriculum option. Members of the community have seen a demand for a classical school that crosses social and economic demographics, and they are volunteering their time to found NCA. NCA enjoys a founding board of diverse expertise and experience which will contribute to the school's solid foundation, successful launch, and positive long-term performance. Board members have experience on the boards of other charter schools and non-profits. BCSI has launched more than twenty charter schools across the country, including six existing or soon-to-open schools in Florida, utilizing this proven

model for classical public education, and their team will provide both initial and ongoing support for the mission and success of NCA.

NCA is committed to maintaining strong fiscal health and implementing best financial management practices in its business operations. The founding board chairman, Matt Mathias is a successful local entrepreneur and businessman with experience on various non-profit and public boards. Another key member of the founding team, Erika Donalds, is a certified public accountant with 17 years of experience in budgeting, financial reporting and analysis, and audit oversight. Ms. Donalds and her team at The Optima Foundation, a non-profit dedicated to supporting BCSI schools, have experience with three previous successful BCSI charter school start-up efforts.

Classical education upholds a standard of excellence and has proven itself over the course of time. NCA's high standards and research-based curriculum will provide students with a traditional education that will challenge them to excel not only in learning but also in character development. At NCA, academic achievement, personal discipline, ethics, and responsibility will be consistently reinforced through the study of subjects in the classical tradition. Students will graduate from NCA highly literate and ethical citizens who are well-prepared to advance into any life endeavor and to inspire others. The leadership of NCA at all levels will hold themselves to the highest standards of integrity, mission-driven focus, and fiduciary responsibility to parents, students, and taxpayers.

Note: Hillsdale College Barney Charter School Initiative Model Application Elements were utilized, with permission, throughout this application. The Optima Foundation, led by Erika Donalds, is responsible for the Treasure Coast Classical Academy (Martin County) charter application, the Jacksonville Classical Academy (Duval County) charter application as well as the Naples Classical Academy charter application. Therefore, many components of their mutual programs have been described similarly by the common author(s).

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.

Mission Statement

To train the minds and improve the hearts of young people through a content-rich classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Naples Classical Academy develops within its students the intellectual and personal habits and skills upon which responsible, independent, and flourishing lives are built, in the firm belief that such lives are the basis of a free and just society. The Academy strives to offer enrichment and to develop character through both curricular and extracurricular offerings, to nurture the child's humanity with a constant view to the potential adult. The time-honored liberal arts curriculum and pedagogy direct student achievement toward mastery of the fundamentals in the basic academic skills, exploration of the arts and sciences, and understanding of the foundational tenets of our Western heritage. The curriculum by purpose and design offers a survey of the best intellectual and cultural traditions of the West as they have been developed and refined throughout many generations.

The classical content of the BCSI-provided curriculum refers to those traditional works of literature, history, and philosophy that embody perennial truths of the human soul and which remain compelling because they present these truths in memorable, or beautiful, ways. These classics are admired not because they are old; rather they are admired because they have continued to ring true with people across many eras, cultures, and tongues. The classics provide the most thoughtful reflections on the meaning and potential of human life. They introduce students into a conversation which spans millennia and seeks to address the ageless questions of the human heart and mind.

Vision Statement

To have a citizenry worthy of the legacy of our country's founders and the continuation of our American experiment, developed through a classical, great-books curriculum designed to engage the student in the highest matters and the deepest questions of truth, justice, virtue, and beauty.

Naples Classical Academy will train students to be stewards of the "Western Tradition" and the pillars of a free society. We believe that the diffusion of learning is essential to the perpetuity of this tradition. Therefore, our aim is to provide a liberal education, not geared toward a specific trade or profession, but one that aims at understanding the highest matters and the deepest questions of truth, justice, virtue, and beauty. Where possible, we believe that we must engage those ideas and those principles in the original texts which have both intrinsic worth and beauty and are worthy of study and contemplation in and of themselves. We also find a clear expression of this legacy both in the founding

documents of our country as an experiment in self-government under law and in the literary and scientific education of the founders themselves. As they sought to avoid the problems of pure democracy as seen in Athens and of a republic that gave way to an empire in Rome and despotism in Europe, we too must engage in those ideas in order to have a citizenry who understands the perils of each. We accomplish this objective through a classical, great books curriculum designed to engage the student in the ideas and principles of our founding.

NCA seeks to provide a content-rich curriculum that uses time-tested instructional approaches with proven track records of success. The term “innovative learning methods” refers to new, advanced, and original ideas and manners of delivering instruction to students. Several unique innovations characterize Naples Classical Academy:

1. All students in grades four and five will be introduced to Latin roots during the study of grammar. Formal study of Latin will begin in grade six using the Florida course “Beginning Latin”. It will continue through Grade 8 and will be offered as a language elective in high school.
2. Upper level students will study with a focus on primary source documents to foster analytical skills and essential insight into their culture and heritage.
3. All students will be trained in study skills such as time management, organization, and note taking, which are essential for building stamina for further academic pursuits.
4. The program will introduce and seek to instill these pillars of virtue in the lower grades: courage, honesty, perseverance, self-government, service, courtesy and responsibility. Instruction in the classical virtues (prudence, justice, temperance, and fortitude) will be introduced in the upper grades as a continuance of the elementary character program and a necessary support of the classical curriculum.

While schools should always have the worthy goal of improving student learning outcomes and concrete methods of self-evaluation, NCA believes that the development of the character will lead to strong academic success. This supports a goal of producing students who communicate effectively, are virtuous, possess cultural literacy, and are active and productive members of American society. In order to accomplish this valuable goal, we propose to use time-honored instructional methods that are now considered innovative, since mainstream academia has adopted other methods in lieu of traditional teaching over the past several decades. While many homeschool families and private schools utilize the classical model, only seven classical public charter schools exist in Florida currently, of the more than 650 charter schools in operation. The following teaching methods are the cornerstone of classical education and support mastery of the state standards:

- Explicit and Systematic Phonics Instruction
- Utilization of Primary Source Documents
- Explicit English Grammar Instruction
- Teaching of Study Skills
- Ability Groupings
- The Socratic Method

To achieve our mission, Naples Classical Academy (“NCA”) will emphasize an education in the humanities, the sciences, and the arts in several current and research-based curricula/programs in the elementary and middle schools, which include:

- The Core Knowledge Sequence (a grade-by-grade core curriculum of common learning)
- Riggs Institute’s *The Writing & Spelling Road to Reading & Thinking* as supplemented by content from Access Literacy, LLC (“explicit” phonics, reading, and language arts)
- Singapore Math (a conceptual approach to skill building and problem solving)

In high school, students will receive a content-rich classical liberal arts education by studying literature, math, history, civics, the sciences, music and art that will align with and exceed Florida Standards. Teachers will be equipped to train upper level students in Socratic Seminars to encourage intelligent, logical, and independent thinking. NCA's curriculum has proven to be successful for all types of learners, including those with unique abilities as well as English Language Learners. NCA's curriculum was selected specifically to meet the needs of the target population, and we expect a student body from diverse backgrounds and with diverse learning abilities. Our curriculum is time-tested, innovative and research-based, and has been successfully implemented for students from academically, socially, and economically varied backgrounds. As an example, at South Bronx Classical, where 86% of students are economically disadvantaged, the school's performance on the 2017-2018 state tests was among the best in the city, with over twice the proficiency rate as district schools and about five times the proficiency rate of District 12 and District 7, where South Bronx Classical Charter Schools I and II are located, respectively.

Classical education upholds a standard of excellence and has proven itself over the course of time. We believe NCA's high standards and research-based curriculum will provide students with a traditional education that will challenge them to excel not only in learning but in character development. At NCA, high academic achievement, personal discipline, ethics, and responsibility will be consistently reinforced through the study of subjects in the classical tradition. Students will graduate from NCA highly literate and ethical citizens who are well-prepared to advance into any life endeavor and to inspire others.

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) 1-3, 6-13*
- *Promote enhanced academic success and financial efficiency by aligning responsibility and accountability. PAGE(S) 104-108*
- *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) 20-22, 34, 51, 181-186*

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 fulfill the following purposes:

- *Improve student learning and academic achievement. PAGE(S) 6-14, 25-30*
- *Increase learning opportunities for all students, with a special emphasis on low-performing students and reading. PAGE(S) 16-18, 26-36, 40-41*
- *Encourage the use of innovative learning methods. PAGE(S) 2*
- *Require the measurement of learning outcomes. PAGE(S) 25-36*

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)(c), 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) 29-30, 182-183*

- *Provide rigorous competition within the public-school district to stimulate continual improvement in all public schools. PAGE(S) 6-14, 19-28*
- *Expand the capacity of the public-school system. PAGE(S) 5-6, 67-71*
- *Mitigate the educational impact created by the development of new residential dwelling units. PAGE(S) 5-6*
- *Create new professional opportunities for teachers, including ownership of the learning program at the school site. PAGE(S) 15-26, 69-71, 80-85*

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) & (e), F.S. If the applicant intends to have enrollment preferences they should be described in Section 14 of the application.**

Student Population to be Served Aligns with the School Mission

NCA's target population includes those students who desire to learn and who have a yearning for knowledge. These students do not mind completing homework at home and they respect the studious atmosphere at their school. NCA's target students learn through teacher-directed instruction and embrace the distraction-free learning environment. They will come from the pool that are currently attending public schools, home school, and private schools.

Enrollment Preferences

NCA will give enrollment preferences to certain student populations as allowed in section 1002.33(10)(d) and required by F.S. 1002.31(2)(c). The school will not limit enrollment as allowed in sections 1002.33(10)(e), but will serve students from the entire Collier County area as well as those from other Florida counties. Collier students will not be displaced by students from other Florida counties as required by F.S. 1002.31(4)(d). This is described in more detail in Section 14.

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

A location for the school facility has not been identified.

- 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.**

Table 2.1 Enrollment Projections

Grade Level	Number of Students				
	Year 1	Year 2	Year 3	Year 4	Year 5
K	126	105	84	84	84
1	105	126	105	84	84
2	105	108	126	105	84
3	105	108	108	126	105
4	105	105	110	110	120

	Number of Students				
Grade Level	Year 1	Year 2	Year 3	Year 4	Year 5
5	120	105	105	110	110
6	120	120	105	105	110
7	0	120	120	105	105
8	0	0	120	120	105
9	0	0	0	100	100
10	0	0	0	0	100
11	0	0	0	0	0
12	0	0	0	0	0
Total	786	897	983	1,049	1,107

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

The student population projections were developed based on the expected resource capacity and budget of NCA in the early years, community demand for charter school seats, and the experiences of other BCSI schools in their initial opening years and beyond. NCA's facility is expected to accommodate approximately 903 students in year 1. However, we believe it is prudent to begin with grades kindergarten through 6, to allow leaders, teachers and students adequate time to acclimate to the new curriculum and environment.

In the 2015-2016 (opening) school year, Pineapple Cove ("PCCA" - a BCSI school in Brevard County, Florida) filled all of its 421 planned spots. In 2016-2017, PCCA had 531 students. In 2017-2018, PCCA had 601 students enrolled for a classical education, and the 2018-2019 students numbered 1,076 on two campuses. Therefore, we expect to be able to fill all of the student seats that we make available based on enrollment capabilities, taking into consideration budget and facility constraints.

The projections allow for some back-filling of students as natural attrition occurs through the years. The number of vacated spots to be filled each year will be determined based on staffing resources in place at that time.

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.

Our rationale for projections for year one is based on limiting the first year to kindergarten through sixth grade. This allows the school to hire teachers certified kindergarten through sixth grade. The number of students is based on establishing enough revenue to pay operational expenses, while keeping the school at a desirable, relatively modest size, which allows us to keep quality controls in place. NCA believes the benefits of a smaller school, including stronger school culture and comradery, better collaboration between teachers, and more cohesive continuation of instruction, will be key to the successful achievement of our mission.

The growth plan for subsequent years allows for a natural growth based on students moving up one grade per year, along with reasonable attrition which is likely to be backfilled with new applicant students.

Section 3: Educational Program Design

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

NCA will provide students a full and complete education that will challenge them to excel both in learning and in character. This classical educational program will succeed through NCA's high standards and curriculum, supported by a well-regulated campus. The goal of NCA is to graduate students who are highly literate, prepared to continue academic achievement, and ready to become responsible members of their community. The curriculum has been carefully selected to facilitate those goals.

NCA will collaborate with Hillsdale College's Barney Charter School Initiative (BCSI) in design and execution of the educational program. BCSI has collaborated with more than twenty other classical schools, including seven existing schools in Florida, on this same task and has developed a curriculum that has shown success across a wide variety of student backgrounds. Their curriculum is characterized by a strong emphasis on language, content-richness in all subjects, a strong core curriculum, and a focus upon the historical, literary, and scientific traditions of the United States and of Western civilization at large.

Foundations

The founders of the United States of America built our free republic on certain fundamental principles. In 1776, George Mason wrote in the Virginia Declaration of Rights, "No free government, nor the blessings of liberty, can be preserved to any people, but by a frequent recurrence to fundamental principles." By fundamental principles, Mason referred to the certain understanding about nature, rights, and government that were later expressed in the Declaration of Independence and are fundamental to the United States Constitution. We agree with George Mason and the other founders of our country that the maintenance and prosperity of our free republic depends upon the capacity of the American people to remain faithful to those founding principles.

Among those founding principles is self-government. The American founders understood self-government in the twofold sense of political self-government, in which we govern ourselves as a political community, and personal self-government, according to which each individual is responsible for governing himself. They believed the success of political self-government required a flourishing of personal self-government and that both are essential to preserving the American way of life. Self-government requires character and good habits, but essential elements of self-government are academic in nature, and these rely in large part on education. Benjamin Rush, a signer of the Declaration of Independence, said the only method of rendering a republican form of government durable "is by disseminating the seeds of virtue and knowledge through every part of the state by means of proper education." The founders understood that education, an education that provides citizens with the knowledge and character necessary for self-government, is essential to the maintenance and prosperity of the American Republic. For that reason, they and leaders throughout our history firmly supported education.

Thomas Jefferson's 1779 *Bill for the More General Diffusion of Knowledge* states that the object of education in primary schools is, "to instruct citizens in their rights, interests and duties, as men and citizens." This was necessary to make the people the guardians of their liberty. According to Jefferson, in grammar schools, students should be taught Latin, English grammar, reading, writing, arithmetic, the

elements of mensuration, and the outlines of geography and history. Furthermore, the books for instructing children to read shall at the same time make them acquainted with Greek, Roman, English, and American history. Jefferson wrote, “by apprizing them of the past we will enable them to judge the future.”

NCA’s educational philosophy and curricular approach were selected to provide the caliber of education Jefferson envisioned. NCA’s classical curriculum—borrowing from the Core Knowledge Sequence, supplemented by the Riggs Institute program and Singapore Math, offering Latin, and providing a strong emphasis on civics and classical virtues which align with Florida Standards such as SS.8.C.1.3 and SS.3.C.2.1. In addition, it will provide students with a robust education that challenges them to excel both in learning and in character.

Program

In the earliest grades, NCA’s curriculum focuses the majority of the day on the teaching literacy and numeracy. Both subjects are foundational to a student’s education, so the resources and methods deployed in each case must be consistent and excellent. We will therefore use the Riggs Institute’s *The Writing & Spelling Road to Reading & Thinking* to teach literacy and related skills, and the Singapore Math program to teach numeracy. As students mature in their facility with language, the curriculum directs their time and intellectual energy into more content-based (as opposed to skill-based) aspects of the curriculum. The basis of these subjects from kindergarten through eighth grade is the Core Knowledge Sequence, made available through the Core Knowledge Foundation.

Literacy

The Riggs Institute’s *The Writing & Spelling Road to Reading & Thinking* is a multi-sensory, brain-based approach for teaching phonics, spelling, reading, handwriting, and grammar. This will be supplemented by content from Access Literacy, LLC (for teaching “explicit” phonics, reading, and language arts). The Riggs program is closely related to the Orton-Gillingham and Spalding Methods, and practitioners of these will quickly recognize the basics of the Riggs program. The Riggs program teaches the 71 letter-sound (phonogram) combinations used in the English language, beginning with the easiest sight-to-sound correspondences, and working towards those that are most complex. Syllabication is critical to a proper understanding of letter-sound relationships, so the Riggs program teaches syllabication from the beginning of kindergarten. Alongside learning phonograms and implementing these into a potent spelling and vocabulary regimen, students using the Riggs program will learn handwriting, including cursive handwriting. As students grasp the basics of English literacy, the program lays a foundation in basic grammar and composition.

Scientific research supports this method (Source: K.K. Stuebing, A.E. Barth, P.T. Cirino, D.J. Francis, and J.M. Fletcher, “A response to recent re-analyses of the National Reading Panel report: Effects of systematic phonics instruction are practically significant,” *Journal of Educational Psychology*, 100(1), 2008: 123-134.

The central position of language in the curriculum continues throughout the elementary and middle school grades, using the “Well Ordered Language” series for grammar instruction. In Grades 4 and 5, students will learn Latin and Greek roots of English words. In sixth grade, students begin learning formal Latin, and will continue with Latin through ninth grade. Latin is introduced and taught alongside English so that students learn the structural underpinnings of their own language, expand their vocabulary, and improve their reading comprehension.

Numeracy

The Singapore Math program provides students with a strong conceptual foundation in basic mathematics. From the earliest grades, this program emphasizes concepts, mental math, and number sense while employing physical and graphical illustrations of underlying mathematical rules and phenomena. The program presents mathematical skill building and problem solving such that students have a better understanding of not simply when to use a particular equation—but why. Moving students on to higher levels of skills before they're ready is not an option, so the program will be employed at each student's ability level. Ability-level groups will be determined at the beginning of each school year, and adjustments will be made on an as-needed basis in order to best equip each student with the language of numeracy.

Knowledge

The Core Knowledge Sequence is based upon E.D. Hirsch's concept of cultural literacy, which makes it the ideal curriculum for a classical school. This sequence was developed to provide comprehensive order to K-8 education, with the intention of training students in the art, literature, science, history, math, and language that form their cultural and intellectual inheritance. First published in 1988, it has been successfully employed and tested in hundreds of schools throughout the United States.

The Core Knowledge Sequence provides a grade-by-grade sequence of specific topics to be taught in grades K-8. It will provide the basic curricular framework for history, geography, literature, visual arts, music, and science at NCA. With cultural literacy as the guiding principle, the Core Knowledge Sequence leads students through a comprehensive and grade-appropriate view of science, literature, art, music, and history. Topics which are especially important for cultural literacy are repeated in a spiraling fashion—so that younger students build a firm but broad foundation in these topics while older students are able to achieve depth. The sequence provides a necessary order across grades and between schools and families, such that teachers can base their lessons upon what students have learned and will learn, and parents can anticipate what their students will learn in each grade. The Core Knowledge Foundation provides resources to support some, but not the entirety, of the sequence, so teachers are supported but encouraged to reach beyond the immediate resources and take ownership of their own lessons. The BCSI has found this arrangement valuable in striking a balance between teacher support and teacher freedom.

Upon graduation, NCA wants all of our students to read well, enjoy it, and understand its importance throughout their lives. Reading is at the very heart of our curriculum. They'll read the classics for pure enjoyment and for the lessons they'll learn there. They'll find out about "The Emperor's New Clothes," laugh with "The Bremen Town Musicians," and sail with Odysseus in the *Iliad* and *Odyssey*. The core curriculum choices will ensure they'll know about world geography. They'll know where the Straights of Gibraltar are and the Bosphorus and Dardanelles and why they're important. They'll explore events in history from the cradle of civilization in the Euphrates valley to the European, African, and Eastern development over the centuries. They'll know the tragic history of wars in Europe and our involvement in them. They'll learn why Columbus said he sailed here and the conquest and settlement of the American Continent including the "little settlement" at Plymouth Massachusetts. Prominent will be the explanation of what is and isn't meant by the term "American Exceptionalism." They'll learn of the "Shot Heard 'Round the World" at Lexington Green and what prompted that event. They'll learn about the "Great Wars" of the 20th century and what the "Iron Curtain" was and the "Berlin Airlift"—including its famous "Berlin Candy Bomber." In high school they'll confront the

dilemma of using “the bomb” to end WWII in Japan. The fundamentals of economics will be part of the curriculum and will introduce students to the differences in controlled and free-market economies. They’ll learn about “The Invisible Hand” and understand what Milton Friedman meant by saying, “there’s no such thing as a free lunch.” We believe this curriculum gives both the guidance and flexibility to teachers to optimize learning and exceed state standards.

Although the rhetoric surrounding a classical school often emphasizes the humanities, the sciences are no less important than the humanistic disciplines and will not play a secondary role at NCA. The Core Knowledge science program focuses on thematically linked science topics and biographies of great scientists. The order of the Core Knowledge program allows for regular repetition of the most important topics, such that students are well-versed in the fundamentals by the time they reach high school. The science program is supported by Pearson’s Science Explorer series, complete with integrated lab manuals and demonstrations and Delta Science Content Readers. A sample overview of the Barney Charter School Initiative (BCSI) K-12 science curriculum along with reference texts is included in Attachment C and the entire document is available upon request. High school students will be offered at least four full years of science classes, and will be expected to complete four years of science to meet graduation requirements.

Middle School

In middle school the normal courses are literature, grammar, composition, civics (seventh or eighth grades), history and geography, science, Singapore Mathematics (generally 6A-6B in sixth grade and pre-algebra in seventh grade). Algebra 1 will normally be taken in eighth grade. Music, art, and Latin will be included each year. The Core Knowledge Sequence will provide a grade-by-grade sequence of specific topics to be taught in Grades K-8. It will provide the basic curricular framework for history, geography, literature, visual arts, music, and science.

High School

In high school, NCA will follow the BCSI course sequence. This includes four and a half years of history; four years of literature, math, and science; three years of foreign language; and a semester each of government in the 11th grade, economics in the 12th grade, and moral philosophy in the 11th grade. In history, students begin with Western Civilization I & II in ninth and 10th grade, learn United States History from 1600-to the present day in 11th grade, and finish with a year of Modern European History (1789-2000) in 12th grade. In literature, student read great works, usually in their entirety, with an emphasis on ancient literature in ninth grade, British literature in 10th grade, American literature in 11th grade, and modern literature in 12th grade. The required track for science is Biology and Chemistry, then options such as Physics, Earth Science, Astronomy, or a more advanced course in Biology or Chemistry in the other two years. In math, students will complete courses at least through Geometry and Algebra II, and be able to take additional courses such as Pre-Calculus, Calculus, and Statistics to complete the four-year math requirement. In foreign language, students will be expected to take at least one year of Latin and two additional years of a foreign language—either Latin or Spanish. One credit of Health and Physical Education will be included.

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.

The basic learning environment will primarily be classroom-based. Daily homework will constitute the majority of independent study for the students. Class sizes will be kept reasonably small, consistent with Florida's constitutional and statutory requirements, to ensure the teacher-to-student ratio is most effective. The mission statement of NCA is to develop students in mind and character through a classical, content-rich liberal arts and sciences curriculum that emphasizes the principles of scholarship, moral character, and civic virtue. The goal is to develop within its students the intellectual and personal habits, virtues, and skills upon which responsible, independent, and flourishing lives are built, in the firm belief that such lives are the basis of a free and just society. NCA prepares its students to be leaders in their homes and communities, entrepreneurs in business, and statesmen in government. Through its content-rich curriculum with a strong emphasis in civics, NCA provides a traditional education with a constant view towards developing exceptional American citizens.

At NCA students will learn language and literature, history, geography, government, math, the sciences, music and the visual arts in a coherent and orderly program that runs from the rudiments of basic literacy and math skills to higher orders of thought and expression. Students will be taught an organized sequence of skills and core knowledge through sound, time-proven methods. They will read classic works of literature, study the fine arts, and learn first-hand accounts of history through the study of primary source documents, including the Declaration of Independence and the Constitution. They will be introduced to the likes of Scylla and Charybdis as a lesson in difficult choices and of Sisyphus as a lesson in futility. Students will also receive rigorous training in the fundamentals and theories of math and science, including the scientific method and will benefit from Socratic instructional techniques and training in study skills that further foster learning and character development. Through the Socratic method, students will learn to ask important questions, setting them on the path to understanding themselves and their world, and encouraging them to act ethically and responsibly.

NCA's robust academic program and training in the virtues will be supported by a well-regulated campus that fosters positive relationships between students, parents, and teachers. Teachers and volunteers will receive training before implementing curriculum or assisting in the classroom. Teaching methods will be modified and differentiated to meet student needs. Differentiation within the BCSI model has been implemented successfully in other schools and we are fortunate to benefit from their experiences. Ultimately, the success of each student will depend upon his or her consistent effort and perseverance. Each will receive the support of every staff member whose focus is academic achievement and a commitment to educational excellence. Blended learning will be used for one credit of Health and Physical Education.

Learning Environment Supports Mission

The founders of our country believed the purpose of education is to prepare students to become good people and good citizens. In alignment with that vision, NCA will provide students with a content-rich education in the classical tradition and a clear understanding of actions and their consequences that will prepare them to become excellent, highly literate individuals and active, responsible members of their community prepared to articulate and uphold our nation's founding principles.

Classroom Management

The school's classroom management approach relies on time-proven methodologies:

Classroom Appearance

- Scholarly setting
- Students seated at desks squared facing front
- Organized, uncluttered structure
- Visuals related to curriculum only
- Students' curriculum-based work exhibited

Teaching Pedagogy

- Teacher-directed instruction
- Teacher delivering content-specific or skill information for majority of classroom time, specifically in the grammar school
- Teaching a rigorous, rich, challenging curriculum that meets or exceeds test standards
- Specific teaching precedes any expectations of students (organization, standards, etc.)
- Focus on mastery
- Focus on skill building (drill and memorization in grammar school)
- Phonics-based reading instruction beginning in kindergarten
- Classrooms may have one curriculum-related event each year, such as medieval feast
- Academically focused – every minute matters
- Using differentiated techniques to reach all students

Classroom Discipline and Expectations

- Successful discipline system in action
- Clear expectations set forth
- Students exhibit respect addressing others "Sir" "Ma'am" and personal titles Mr., Ms.
- Students also stand up when participating in curriculum related exercises such as disputation/debate, discussions, mock trials
- High expectations are in every aspect of the school
- Homework supports the curriculum and reinforces concepts taught
- Emphasis on the Pillars of Virtue when addressing actions and consequences

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

Classical education is time proven with a history of over 2,500 years in the West. It began in ancient Greece, was adopted wholesale by the Romans, faltered after the fall of Rome, made a slow but steady recovery during the Middle Ages, and was enlivened in the Renaissance. The classical inheritance passed to England and from England to America through colonial settlement. At the time of this nation's founding, classical education was thriving. Jefferson heartily recommended Greek and Latin as the languages of study for early adolescence. Plutarch's *Lives of the Noble Greeks and Romans* was often recommended by men like Jefferson and Franklin, and Hamilton seems to have given it special attention during his military encampment at Valley Forge. Eighteenth-century Americans venerated and trusted George Washington in large part because he reminded them of the Roman patriot Cincinnatus. So important has classical education been in the history of the West that it would only be a slight exaggeration to say that the march of civilization has paralleled the vibrancy of classical schools. Such a long tradition of education continues to be relevant today.

Classical education, from a research base, is most closely aligned with cognitivist learning theories. These theories postulate that children generate knowledge and meaning through sequential development of an individual's cognitive abilities, such as the mental processes of recognize, recall, analyze, reflect, apply, create, understand, and evaluate. 'The Cognitivists' (e.g. Piaget, Bruner, Vygotsky) learning process is adoptive learning of techniques, procedures, organization, and structure

to develop internal cognitive structure that strengthens synapses in the brain. The learner requires assistance to develop prior knowledge and integrate new knowledge. The purpose in education is to develop conceptual knowledge, techniques, procedures, and algorithmic problem-solving using verbal/linguistic and logical/mathematical intelligences. The learner requires scaffolding to develop schema and adopt knowledge from both people and the environment. The educators' role is pedagogical in that the instructor must develop conceptual knowledge by managing the content of learning activities.

A classical education is more than simply a pattern of learning. Classical education is language-focused; learning is accomplished through words, written and spoken, rather than through images (pictures, videos, and television). This is important to understand because language-learning and image-learning require very different habits of thought. Language requires the mind to work harder; in reading, the brain is forced to translate a symbol (words on the page) into a concept. Images, such as those on videos and television, allow the mind to be passive. In front of a video screen, the brain can “sit back” and relax; faced with the written page, the mind is required to exert energy and work. A classical education, then, has two important aspects. It is language-focused and it follows a specific three-part pattern: the mind must be first supplied with facts and images, then given the logical tools for organization of facts, and finally equipped to express conclusions. Riggs Institutes' reading program, *The Writing & Spelling Road to Reading & Thinking*, is a brain-based approach with multisensory instruction that addresses all learning styles. Riggs began with Dr. Samuel Orton, a neuroscientist who researched the functioning of the human brain in learning language skills. In collaboration with teachers, he combined his multisensory techniques with classical and Socratic instructional approaches to teaching. Riggs is an “explicit” phonics approach as defined and recommended in a Federal Compilation of Reading Research: *Becoming a Nation of Readers*, 1985. The explicit phonics approach is often used as a remediation technique in non-classical schools, when students begin to fall behind in reading. We believe that utilizing explicit phonics with all students from inception will reduce the need for remediation in the future. Accommodations for students with special needs will be implemented throughout various stages of the learning process according to the students' IEPs. For example, a student may need additional time or an alternate technique to memorizing the phonetic sounds.

For grades K-7, math will be taught using the U.S. edition of Singapore Math, an English equivalent to the national mathematics curriculum used in Singapore. Singapore is the world leader in mathematics achievement, according to at least two major longitudinal studies. According to the Trends in International Mathematics and Science Study (TIMSS), an international comparative study designed to measure achievement at the fourth and eighth grades, Singapore ranked in the top three countries in both fourth and eighth grades in every year the study was conducted (1995, 1999, 2003, 2007, 2011, and 2015). The Programme for International Student Assessment (PISA), a triennial international survey that evaluates OECD (Organisation for Economic Co-operation and Development) countries by testing the skills and knowledge of 15-year-old-students, has also consistently ranked Singapore highest in mathematics. The PISA survey has ranked Singapore in the top two countries for mathematics in 2009, 2012, and 2015.

Singapore Math was developed in 1981 by the Curriculum Planning and Development Institute of Singapore. Educators in the United States began implementing Singapore Math in 2000. Topics are taught to a mastery level with detail and consistency, and the textbooks are designed to build a deeper understanding of mathematical concepts as opposed to offering simply definitions and formulas.

Professional development accompanies Singapore programs so teachers are better prepared to facilitate lessons. Singapore Math has a consistent emphasis on problem solving and model drawing, with a focus on in-depth understanding of the essential math skills recommended in the National Council of Teachers of Mathematics Curriculum Focal Points, the National Mathematics Advisory Panel. Students using Singapore Math learn math concepts thoroughly, but they also master essential math skills more quickly, and it has been reported that by the end of sixth grade, students have mastered multiplication and division of fractions and are able to complete difficult multistep word problems comfortably, ensuring they are well prepared to complete Algebra I in middle school and described in Section 3-A above, (Source: John Hoven and Barry Garelick, “Singapore Math: Simple or Complex?” Educational Leadership 65:3, November 2007).

The Barney Charter School Initiative currently has more than twenty classical charter schools in operation across the country, including six existing or soon-to-open schools in Florida. BCSI utilizes this network and inputs from the affiliated schools to share best practices and refine the recommended curriculum. Innovations which are helping students succeed within the classical model can be shared and implemented across other BCSI schools. This has proven to be an effective model for continuous improvement of the education program.

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.

Core Knowledge Sequence

The Core Knowledge Sequence curriculum is aligned with the Common Core State Standards (CCSS), as represented by the Core Knowledge Foundation. NCA has reviewed the minimal differences between the CCSS and the Florida Standards, and will address those differences with supplemental curriculum material, as needed. The Core Knowledge Sequence curriculum has been utilized in the existing Florida BCSI charter schools and aligns well with the standards, based on the evidence of Florida Standards Assessment results.

Singapore Math

The Singapore Math curriculum is aligned with the Common Core State Standards at each grade level. The alignment was completed by the Singapore Math Corporation, which offers specific text and workbooks recommended for schools adopting the program. NCA has reviewed the minimal differences between the CCSS and the Florida Standards, and will address those differences with supplemental curriculum material, as needed. The Singapore Math curriculum has been utilized in the existing Florida BCSI charter schools and aligns well with the standards, based on the evidence of Florida Standards Assessment results.

Riggs Institute’s *The Writing & Spelling Road to Reading & Thinking*

The Riggs Institute’s English Language Arts curriculum, *The Writing & Spelling Road to Reading & Thinking*, fully integrates the learning strands in the Common Core State Standards. NCA has reviewed the minimal differences between the CCSS and the Florida Standards, and will address those differences with supplemental curriculum material, as needed. The Riggs Institute curriculum has

been utilized in the existing Florida BCSI charter schools and aligns well with the standards, based on the evidence of Florida Standards Assessment results.

The Riggs Institute's explicit phonics program functions also in the area of grammar, syntax, composition, spelling, and vocabulary. These skills are critical components of the Florida Standards and will complement the Core Knowledge Sequence curriculum to offer a superior, literacy-based reading and writing program. NCA's educational philosophy and curricular approach will promote literacy and character excellence for all its students. The chosen curriculum focuses on the acquisition of specific skills and knowledge of certain disciplines following the Core Knowledge Sequence in grades K-8 and a classical model in the high school. These components work well together and provide a comprehensive and organized approach to instruction that meets state standards and that can be modified to bring students of all learning abilities up to grade level. These programs, along with BCSI recommended texts and materials, will ensure NCA students achieve the goals and expectations of the Florida Standards, and obtain the knowledge and skills necessary for student success.

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 Will Prepare Students to Achieve Florida Standards

The basis of the NCA curriculum is a collaboration between NCA and Hillsdale. As previously mentioned, BCSI has a complete set of curricular and resource recommendations from kindergarten through 12th grade. Existing Florida BCSI charter schools have all achieved a "A" rating.

NCA will adopt a curriculum with a core focus on science, math, English language arts, and history. Second to these four cores, though integral to the curriculum, are the subjects of art, music, and foreign language. In high school, NCA will also include government, economics, and moral philosophy as classes that are integral complements to the four core areas of study. NCA will assess student initial readiness at the beginning of the year using multiple formative assessments.

Core Knowledge Sequence

The basis of the curriculum in K-8 is the Core Knowledge Sequence, prepared by the Core Knowledge Foundation and used widely across the United States for well-over twenty years. The Core Knowledge Foundation provides an alignment packet and webinar to adoptees which assist schools in implementation of the Sequence in alignment with the state standards. The Foundation also offers an alignment chart for each unit which identifies alignment between the curriculum and the CCSS. NCA has reviewed the minimal differences between the CCSS and the Florida Standards, and will address those differences with supplemental curriculum material, as needed.

The cumulative nature of the Sequence lays out specific grade-level content, but sometimes Florida Standards (e.g., social studies and science) do not fully align with this curricular framework. In those cases, supplemental curriculum may be utilized in order to ensure full alignment. Many supplemental resources have already been developed by BCSI or other BCSI schools to address the variations between the Sequence and the standards.

Riggs Institute's The Writing & Spelling Road to Reading & Thinking

Following BCSI recommendations, NCA will supplement the Core Knowledge Sequence with the literacy program developed by the Riggs Institute—*The Writing & Spelling Road to Reading & Thinking*. BCSI, in collaboration with literacy experts at Access Literacy, LLC, recommends a few minor adaptations to the Riggs program to improve implementation of the program. NCA will make use of these adaptations and this overall program. Riggs is one part of our approach to teaching students how to think and write well, which are required by our Florida Standards.

Singapore Math

NCA will supplement the Core Knowledge Sequence in mathematics by using the Singapore Math curriculum from grades K-8. Singapore's latest Dimensions Math PK-8 will be used. With regard to alignment with standards, the Singapore Math website states, "DM PK-8 is not precisely aligned with the Common Core Standards, but covers all the standards in its own unique progression. Any few standards not included in the textbooks (for example, line plots of measurements to fractions of an inch in Grade 3) are in teacher's guides."

Latin and The Well-Ordered Language

NCA will also include instruction in Latin, beginning on a formal basis in sixth grade, preceded by the teaching of Latin and Greek roots in Grades 4 and 5. *The Well-Ordered Language* curriculum will be the basis for formal grammar instruction in the upper elementary grades. Both Latin and *The Well-Ordered Language* curriculum will help students improve grammar as required by Florida Standards.

High School

In high school, NCA will follow the BCSI course sequence. This includes four years of history; four years of literature, math (one of which must be Algebra 1, Geometry and Algebra 2), and science (one of which must be Biology 1 and Chemistry 1); three years of foreign language (one of which must be Latin); one year of composition, and a semester each of government, economics, senior thesis and moral philosophy.

Primary Instructional Strategies

The two primary instructional strategies employed at NCA will be the lecture and Socratic method/discussion.

The classical model values the teacher as the possessor of knowledge, and the teacher-led discussion or lecture methods of instruction allow the teacher to impart his or her knowledge to the students. Students will be taught how to take outlined notes beginning in the early grades, which helps to engage them during the lecture. Note-taking by hand improves retention of information and provides the student information from which to study for assessments. Reviewing students' notes can also inform the teacher about students' attentiveness. Teacher-led discussion and lecture in the form of story-telling or read-aloud will be used most frequently in the lower grades.

The Socratic method includes the use of direct, intentional questions to guide students' understanding of problems and their solutions. This will be a fundamental part of instruction, particularly in literature and history courses. The Socratic method is appropriate for the anticipated student population since it assumes more discussion and less independent reading without guidance.

The Socratic discussion is the ideal mode of classical instruction, but the founders of NCA are under no illusion that young and inexperienced students can immediately partake in or profit from such a discussion. Rather, the guiding principle for most K-12 instruction will be that instruction be "teacher directed." Most of the time teacher-directed instruction will take the form of a lecture, story, read-aloud, or teacher-led discussion. Teacher-led discussion will help to model inquiry and analysis for students as a way of preparing them to engage in more open Socratic discussion in high school.

Projects, student-led discussion, student-led inquiry, and other modern modes of instruction will have a limited place at NCA, and only within the broader context of the mission, curriculum, and school culture. Teachers will receive training and feedback about when best to employ these and other methods, with an emphasis placed on teacher-led, content-rich instruction in all subjects. This emphasis is consistent with the tradition of classical education and with the content-rich curriculum from Core Knowledge Sequence (and other sources) that the school will employ.

One instructional strategy that is more peculiar to the classical school is the use of primary sources for teaching history. Especially in the upper grades, history instruction at NCA will depend upon primary source documents—artifacts, documents, recordings, or other sources of information created at the time under study. In the high school, for example, teachers of American history will introduce students to historical works that contributed to the formation of American society and culture such as George Washington's "Farewell Address" and Martin Luther King Jr.'s "Letter from Birmingham Jail." Such primary sources will bring history to life and equip students with essential insight and analytical skills.

Other Instruction Strategies

- Explicit and Systematic Phonics Instruction - Through the direct teaching of letter-sound relationships through a specified sequence, the foundation for literacy is established and provides students the ability to decode the printed word. Scientific research supports this method (Source: K.K. Stuebing, A.E. Barth, P.T. Cirino, D.J. Francis, and J.M. Fletcher, "A response to recent re-analyses of the National Reading Panel report: Effects of systematic phonics instruction are practically significant," *Journal of Educational Psychology*, 100(1), 2008: 123-134).
- Explicit English Grammar Instruction - Using tools such as diagramming and the study of root words, students will be equipped to speak and write with a high degree of communicative competence. As students learn to identify parts of speech and seek to develop syntax, they are able to communicate more clearly on all levels. The more they learn about the English language and its structure, their ability to easily and fluently express more complex thoughts becomes evident.
- Ability Groupings - Instructional supports and strategies are most effective through the use of flexible ability groupings in the core subjects of reading, writing and math. Ability groupings will allow NCA to tailor instructional techniques and class time to meet the needs of all types of learners. We will provide individualized supports for all learners while maintaining the same expectations of outcome. Students will be placed into ability

groupings upon admission using initial assessments that indicate strengths and weaknesses. Those with IEPs will receive accommodations as required on an individual basis. Students will be moved across groupings as additional assessments suggest. Students are responsible for mastery of the same skills and concepts and are required to take the same assessments regardless of grouping (using accommodations as required by the IEP, as applicable). Using differentiated instructional strategies will enable teachers to optimize the learning of all students.

- Utilization of Primary Source Documents - Primary sources are materials that were created by those who participated in or witnessed the events of the past. They can include letters, reports, photographs, drawings, sound recordings, motion pictures, and artifacts, as well as books. Although sometimes life lessons (e.g., motives, ethics, and “cause and effect”) are not necessarily obvious or easy to define, primary sources can bring them to life. They reflect events and experiences that actually occurred and introduce students to the individuals who lived them.
- Teaching of Study Skills - Time management, organizing, memory techniques, notetaking, and outlining will be emphasized throughout NCA and integrated throughout the curriculum to equip students for higher learning. Developing stamina for challenging and complex work is imperative for the promotion of a strong work ethic.
- The Socratic Method - The use of direct, intentional questions to guide students’ understanding of problems and their solutions will be a fundamental part of instruction, particularly in literature and history courses.

Differentiated Instruction Methods and Systems

The school will provide differentiated instruction in reading, mathematics, science and social studies with the possibility of providing differentiated instruction in other areas on a case-by-case basis. In math, the school will group students by ability. This will require a common math period for all K-6 students and scheduling of differentiated courses for Grades 7-12 students. Students will be assessed after several weeks of math instruction, and this assessment will provide teachers with both a baseline of student learning and a significant metric for placing students into ability groups. Ability grouping is a significant complement to the Singapore Math program, and helps to ensure that students receive the foundation in math that is necessary for understanding upper-level mathematics. Students with special needs will be provided accommodations and/or specialized instruction as outlined in the students’ IEPs.

NCA will also provide differentiated instruction in its literacy and reading curriculum. The Riggs program is quite similar to the Orton-Gillingham and Spalding programs employed by many schools for reading remediation. By using this program with all students, we expect to meet many student literacy problems before they develop. Students who are reading and writing at a slower pace than their grade cohort will be trained in the language of instruction used in reading remediation—and they will receive remediation as problems are identified. NCA will develop a program to provide struggling students with additional literacy instruction, likely through flexible scheduling blocks or classroom pull-outs. Additionally, students will receive differentiated instruction in the course of reading practice, wherein students will be grouped by ability and/or led through a reading practice regimen designed to meet each student at his or her ability level. A daily enrichment and remediation period built into NCA’s class schedule will allow the extra time necessary to provide supplemental supports and instruction for struggling students.

Outside of mathematics and literacy, NCA will use differentiated instruction on a case-by-case basis for science and social studies. The Core Knowledge Sequence program allows for a significant amount of latitude with regard to particular topics. Students who are capable of work above their grade level may be given the option to read additional works of literature, read adapted works in an original or longer form, or study history and science content in a more comprehensive form (e.g., by reading upper-level texts or receiving instruction from upper-level teachers). Students who are behind their grade cohort will receive whatever instructional aids are called for by an Individualized Education Program (IEP). Students with or without an IEP may also receive various instructional support identified by the teacher, administrator, and Student Services such as adapted reading assignments, additional tutoring, oral exams, etc.

Students Who Enter the School Below Grade Level

In all cases where differentiated instruction is offered to students performing below grade level, the intent of the differentiated instruction will be to bring student performance to grade level standards. Highly effective teachers will intentionally use all these strategies to engage students, including those performing below grade level, in maximizing their benefit from the curriculum. A daily enrichment and remediation period built into NCA's class schedule will allow the extra time necessary to provide supplemental supports and instruction for those students who enter below grade level, or who may fall behind.

It is the intention of NCA to use progress monitoring, unless the student has a disability and receives services on an IEP that more appropriately can address the identified deficiencies. NCA may recommend that low performing students attend additional remediation programs held before or after regular school hours or during summer. Each student who does not meet minimum performance expectations for the statewide assessment tests in reading, writing, science, social studies, and mathematics will continue remedial or supplemental instruction, including those specifically provided for in Florida Statutes, until expectations are met. Progress monitoring will stay active until a student has made sufficient learning gains to illustrate proficiency.

The framework used to identify student learning deficiencies, develop hypotheses, formulate a plan, monitor progress, and analyze results will follow the Multi-Tiered Systems of Support (MTSS) model. The school will set up systems and methodologies to address student needs that may include data-based goals, reflection and review of instruction and methodology, differentiation of the instruction and other targeted interventions, as well as formative and summative assessments. The MTSS model, described in detail in Section 6 of this application, seeks to prevent academic failure through early intervention, frequent progress measurement, and increasingly intensive research-based instructional interventions for children who continue to have difficulty.

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.

Curricular Choices

The curriculum for kindergarten through eighth grade will be the Core Knowledge Sequence published by the Core Knowledge Foundation. The Sequence is distinguished by a planned progression of specific knowledge in world history and geography, American history and geography,

mathematics, science, language arts, visual arts and music. The Core Knowledge Sequence will be supplemented with the Riggs literacy program and Singapore Math. The Riggs program is supported by the curriculum *The Writing & Spelling Road to Reading & Thinking*. Riggs is a multi-sensory, brain-based approach to teaching explicit phonics, reading, language arts, and composition. It focuses on teaching students the “code” of the written English language, thereby giving students a strong foundation in the fundamentals of literacy.

BCSI, in concert with other classical charter schools and the math faculty at Hillsdale College, has found Singapore Math to be the best provider for a curriculum that lays a strong foundation in mathematical concepts; furthermore, BCSI has found this particular combination of Singapore Math resources to be the best arrangement of the program’s resources. The curriculum is based on the math program used throughout the country of Singapore, and international math scores show very high student outcomes as a result of using this resource.

The Core Knowledge Foundation has produced some curricular resources to support the use of the Core Knowledge Sequence in grades K-8. NCA will make selected use of these resources, especially in history, literature, music, and art. Though the Core Knowledge Foundation provides some resources for science, the BCSI has supplemented these with a series of curricular elements. These include, but are not limited to, the Science Explorer series from Prentice Hall, ScienceSaurus from Houghton Mifflin Harcourt, and Delta Science Content Readers from Delta Education.

BCSI has searched the marketplace for the best platform and materials for a classical education and have effectively used this curriculum in more than twenty other successful public charter schools across the United States. BCSI services and resources are provided at no cost to NCA. In addition to curriculum recommendations, BCSI provides consulting and guidance on curriculum procurement and development at no cost to the school. BCSI has assembled a team of specialists in each subject area to assist the affiliated schools in successful implementation of the academic model. The sample scope and sequence in Attachment C comes in significant part from the Core Knowledge Foundation and has been modified to include the other curricula as described here and recommended by the BCSI.

- **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.**

The curriculum is fully developed. See above.

- **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 Attachment D.**

Reading: A Primary Focus

Teaching students to read well will be the primary focus of early elementary education at NCA. Once students have transitioned from “learning to read” to “reading to learn,” the focus of the NCA curriculum will appropriately shift. From mid-elementary forward, the curriculum will place a strong emphasis on reading, and especially upon reading works of great literature. To teach students to read, NCA will employ the literacy program developed by the Riggs Institute and supplemented by content from Access Literacy, LLC. To ensure that teachers are equipped to use these methods, teachers will receive extensive training prior to the school opening.

Grades K-2 Strategies

Once the school has opened, teachers will receive continuing education in the method through additional training sessions, observation and critique by method experts, and by working with the school’s special education authority. In grades K-2, the largest portion of classroom intellectual energy will be directed towards reading, writing, spelling, and basic composition. Grade promotion in these grades will be based primarily upon literacy.

Grades 3-5 Strategies

Once students have learned how to read well, reading comprehension exercises will slowly be replaced with literature. From Grade 3 forward, authentic literature will become a primary component of the curriculum, one of the four curricular cores. Literature in the younger grades (especially in Grades 3-5) will expose students to a certain level of cultural literacy and understanding, thereby allowing them to understand the literary traditions that they have inherited from characters like Robin Hood and writers like Robert Louis Stevenson.

Grades 6-12 Strategies

Literature in the upper grades will have the same purpose, but with the additional benefit of students reading the works in their original form (or as close to the original form as is possible for translated texts) to develop their own understanding of and facility with the language. The literary texts increase in difficulty and depth as students increase in grade level. Students receive further reading instruction through vocabulary expansion, grammatical analysis, and class discussion. They are presented with tales that are gripping and meaningful. Teachers are trained not only how to teach this literature as just described, but also to engage the students in wonder and discussion. These book choices have captivated multiple generations, some over hundreds, even thousands of years, nurturing a love of literature and so of reading.

Strategies for Students who are Reading at Grade Level or Higher

Students who are capable of work above their grade level will be given the option to read additional works of literature or read adapted works in an original or longer form.

Strategy for Students Reading Below Grade Level

Students who are behind their grade cohort will receive adapted reading assignments (or shorter adapted works of literature), audiobooks, read-alouds of the original, or other support as identified by the teacher and administrator.

Strategy for Students Below Grade Level in History and Science

Students who are behind their grade cohort will receive adapted science or history assignments or other support as identified by the teacher and administrator.

- 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.**

Additional Academic Standards

Beginning in sixth grade, students at NCA will begin learning formal Latin, and will continue to do so through at least eighth grade. The teaching of Latin is an integral part of the classical school's robust literacy curriculum. Latin provides insight into the meaning of over half of English words. Its complex grammar enables students to gain a critical knowledge of English sentence structure and composition. Latin offers a bridge to learning other languages. And knowledge of Latin allows one to achieve the heights of English literacy since so many Latin phrases still find currency in modern speech: e.g. (*exempli gratia*), *ex post facto*, *ex officio*, *id est* (i.e.), *ex nihilo*, *ibid.* (*ibidem*), *gravitas*, *E pluribus unum*, A.D. (*Anno Domini*), *homo sapiens*, etc.

Adoption Process

BCSI has piloted the teaching of Latin in more than twenty BCSI charter schools. It is a cornerstone of preparing students for college. Latin was the language of scholarship for the majority of the last two thousand years, and is still used in the classification of living organisms. The goal of the Latin curriculum is, in part, to have students able to read at least some Virgil in the original as they are reading the *Aeneid* in translation in the freshman classical literature course. The teaching of Latin thus moves from being peripheral to other classroom subjects (but useful, nonetheless) to become complementary to the literature and history curricula. Latin instruction reinforces and extends the student's knowledge of English grammar, and strengthen skills in composition. Students will be encouraged to take the National Latin Exam to help them measure their mastery of the Latin language. This exam can be taken as early as seventh grade.

Additional Standards Exceed Required Standards for Sixth, Seventh and Eighth Grades in World Language

As there is no state requirement for students to learn Latin, three grade levels (6-8) will exceed state standards. The NCA Curriculum Coordinator will be trained by BCSI and will guide teachers, to establish the minimum level of Latin proficiency necessary for grade promotion in Grades 6-8. This shall be consistent with the Florida Standards required by the Florida courses; Latin Beginning, Latin Intermediate and Latin 1. In order to allow for transfer students into Grades 6-12, the school will also develop a program to allow students to complete their Latin requirements without delaying their high-school graduation. This will be accomplished by assigning incoming students into first year Latin courses. As an example, the first year Latin course "Latin1" would be scheduled for high-school students in grades nine through 12.

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

The curriculum of NCA will be based on the curriculum devised by BCSI. The foundational materials for this curriculum are based in part on the curriculum and the success of Ridgeview Classical School in Fort Collins, Colorado, a nationally-recognized leader in charter schools. Dr. Terrence Moore

helped to develop the curriculum at Ridgeview Classical School (as school principal) prior to bringing his experience and curricular insight to the BCSI. Dr. Moore has continued his career by founding both Atlanta Classical Academy in Georgia and Ascent Classical Academy in Colorado. Since its inception, BCSI has collaborated with more than twenty charter schools throughout the nation, these schools being in Florida, Texas, Colorado, New Mexico, Arkansas, Michigan, Indiana, Georgia, Ohio, Idaho, and Nevada. Established BSCI schools in Florida include Pineapple Cove Classical Academy, which is rated an A school by the state of Florida's A-F grading system. These schools use Latin to improve grammar. Hillsdale's experience with these schools and the BCSI curriculum in use since 2012, including feedback from students, parents, teachers, and standardized test results, continues to inform the curriculum development and improvement.

BCSI provides initial teacher training on its curriculum, continuing professional development each summer, and regular updates to their curricular and resource recommendations. Their collaboration offers schools the kind of information and experience that is ordinarily available only to large charter management organizations, however, training and curriculum support is provided to BCSI schools at no charge. The collaboration between NCA and BCSI will focus on curriculum and consultation. BCSI is primarily interested in helping charter schools to develop and use good curriculum and instruction, and has no direct financial interest in NCA or any other affiliated schools. The curriculum devised by BCSI is not intended as a standards-based curriculum, but BCSI-affiliated schools have generally performed well on state assessments. NCA and other BCSI schools located in Florida have evaluated the curriculum and have aligned the curriculum with Florida Standards with supplemental materials and adjustments to the curriculum timeline.

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

In addition to the four core academic areas, though integral to the curriculum, are the subjects of art, music, and foreign language. In high school, NCA will also include government, economics, and moral philosophy as classes that are essential complements to the four core areas of study.

Music and Visual Arts

The Fine Arts are a fundamental part of classical education. Music and visual arts will be taught in studio, historical, and cultural context at all levels of curriculum.

World Languages

NCA's curriculum will include instruction in Latin, beginning on a formal basis in sixth grade, preceded by the teaching of Latin and Greek roots in Grades 4 and 5. Other modern languages will be offered in high school, including Spanish. For college entrance, it is advisable that students take three years of a foreign language. The language requirements of the school will meet or exceed Florida Standards and be in line with college expectations.

Health

Health Opportunities through Physical Education (H.O.P.E.) or equivalent Physical Education courses will be required as an on-line course in high school.

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

Systems and Structures

The classical educational model leads to improved academic performance for all students. Interventions and/or special needs accommodations/modifications are addressed in Section 6 and 7 of this application. NCA defines accommodations as adjustments to the way the student is expected to learn or how he or she is tested. Modifications are changes to what the student is expected to learn.

Schedule allotment for interventions (walk to enrichment and walk to math) are noted in the class schedules. Teachers, administration, and support staff will implement various strategies and methods for modifications, differentiation, and scaffolding to meet each student's needs. The following systems and structures will be included:

- **Systemic Approach**: Ongoing and continuous improvement across all grade levels.
- **School-Community Collaboration**: Everyone in the school community is accountable for the quality of education.
- **Safe Learning Environments**: A comprehensive discipline plan and violence prevention plan will include conflict resolution strategies and will deal with potential violence as well as crisis management.
- **Family Engagement**: Family engagement has a direct, positive effect on youth's achievement and is one of the most accurate predictors of a student's success in school.
- **Early Literacy Development**: Early literacy interventions to help low-achieving students improve their reading and writing skills establish the necessary foundation for effective learning in all subjects.
- **Mentoring/Tutoring**: Mentoring offers a significant support structure for high-risk students.
- **Service-Learning**: Service-learning connects meaningful community service experiences with academic learning.
- **After-School/Out-of-School Opportunities**: After-school clubs and sports provide opportunities that often decrease information loss and can inspire interest in arenas otherwise inaccessible.
- **Professional Development**: Faculty who work with youth at risk of dropping out need to be provided ongoing professional learning opportunities, support, and feedback.
- **Active Learning**: Active learning and student engagement strategies engage and involve students in meaningful ways as partners in their own learning.
- **Educational Technology**: Instructional technology can effectively support teaching and learning while engaging students in meaningful, current, and authentic efforts; addressing multiple intelligences and adapting to students' learning styles.
- **Individualized Instruction**: Learning experiences can be individualized, differentiated, or personalized (combining paced and tailored learning with flexibility in content or theme to fit the interests, preferences, and prior experiences of each learner).

Students Below Grade Level

If a student proves to have major deficiencies because of a weak educational background or some other reason, the classroom teacher(s) will, in conjunction with the support staff, work on remediation strategies which may include some pull-out tutoring and modification of assignments with the focus on bringing the student up to grade level. In the case of Grades 7-12 students, remedial classes or extra tutoring may be assigned in place of electives. Parents will be notified of the particular strategies that are adopted.

In addition to identifying students who need academic assistance (an on-going process) the school may add teacher assistants in the lower grade classrooms (grades K-2 initial year and more in later years). Another method to assist in the learning process is scaffolding. Scaffolding refers to providing contextual supports for meaning through the use of simplified language, teacher modeling, visuals and graphics, cooperative learning and hands-on learning. Then, as students become more proficient, the scaffold is gradually removed. The objective at the school will be to maintain the rigorous curriculum designed for each grade, but to modify methods and practices to ensure all students are achieving at grade level. Moreover, as the school grows, additional classes will be offered in Grades 7-12 in order to remediate those students requiring extra help.

For students who come to the high school below class level, remedial classes will be created in order to bring students up to grade level. As the seventh through twelfth grades grow, NCA will also offer different levels of courses, such as Honors and Advanced Placement courses for students requiring more challenging coursework. Assessments will be an on-going process and the school will utilize assessment data to improve academic achievement at all levels.

English Language Learner (ELL) and Exceptional Student Education (ESE)

We expect that the classical education model curriculum will improve student performance for ELL pupils and students with disabilities as it uses strategies that have improved student performance for these populations at other BCSI schools. NCA's content-rich curriculum will provide ELL students with necessary background knowledge and cultural literacy, the lack of which is often a challenge in reading comprehension. ELL strategies include modeling, explicit instruction, vocabulary development, and using visuals and manipulatives. All of these are components of NCA's selected curriculum. Additionally, using multisensory teaching methods (visual, auditory, kinesthetic) and flexible grouping/small groups are well suited for ELL students as well as students with disabilities and those student requiring accommodations according to their IEPs. Existing IEPs will be evaluated prior to the start of school in order to begin to plan accordingly for accommodations and services. Then each student will be re-evaluated to ensure appropriate accommodations are identified which align with NCA's curriculum and program.

A rigorous curriculum with ability grouping will lessen the need for additional gifted programs. Nevertheless, more challenging assignments can be given to individual students, such as having students in fourth grade read the real Robinson Crusoe rather than the Core Knowledge adapted version. Discussing literature and history as a whole class (versus what schools are currently doing with individualized pacing) allows all students to profit more from the lesson and fosters greater involvement from readers of all ability levels.

Reading Program

The Riggs Institute program is quite similar to the Orton-Gillingham and Spalding programs employed by many schools for reading remediation. By using this program with all students, we expect to meet many student literacy problems before they develop. Students who are reading and writing at a slower pace than their grade cohort will be trained in the language of instruction used in reading remediation—and they will receive remediation as problems are identified. NCA will develop a program to provide struggling students with additional literacy instruction, likely through flexible scheduling blocks or classroom pull-outs. Additionally, students will receive differentiated instruction in the course of reading practice, wherein students will be grouped by ability and/or led through a reading practice regimen designed to meet each student at his or her ability level.

Students at Risk of Dropping Out

A positive relationship exists between family engagement and improved academic achievement. This is true across socioeconomic, racial/ethnic, and educational backgrounds for students of all ages. NCA will reach out to families of students at risk of dropping out to encourage their involvement with the student's academic life. NCA will respond to the qualities, characteristics, and needs of the parents in order to overcome the barriers which interfere with communication. These barriers include parents' level of literacy; language preferred for reading, listening, speaking, and writing; daily commitments and responsibilities that may affect the time, energy, and attention available to devote to school; and parents' level of comfort in becoming involved in their children's education. NCA will initiate the following action steps to establish effective family engagement programs:

1. Recognize that all parents, regardless of income, education level, or cultural background should be involved in their children's education and will want their children to do well in school;
2. Combine family and community engagement efforts with student learning;
3. Create initiatives that will support families to guide their children's learning, from kindergarten through high school;
4. Develop a culture within the school which expects all teachers and staff to work well with families;
5. Implement steps to engage families on developing trusting and respectful relationships; and
6. Share power with families as partners. Ensure that parents and school staff understand that the responsibility for children's educational development is a collaborative enterprise.

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.**

Incoming Baseline of Student Academic Achievement

The incoming baseline of student academic achievement is expected to be across a broad spectrum of possibilities since our anticipated student population includes current Collier County Public Schools (CCPS) students, homeschool students and private school students. Based on the experience of other BCSI schools, our team understands that the baseline achievement levels per student will vary wildly. Correspondingly, we understand how to prepare for this and put mitigation plans in place. The NCA baseline achievement levels are expected to be equal to the Collier weighted average of the nearest K-5 schools. These are listed in the table below for grades 3 through 5. Students in grades Kindergarten through two are expected to have the same achievement levels on school-based assessments as those in grades 3 through 5 in the table below.

Thus, our baseline expectations are as follows for the percent of students scoring at a level 3 and above:

Table 5.1 Projected Baseline

Grades 3-5	Students	ELA	Math	Science
Florida		57	62	53
Collier		60	67	56
Big Cypress Elementary School	890	69	67	71
Corkscrew Elementary School	596	77	81	75
Estates Elementary School	652	44	73	50
Laurel Oak Elementary School	961	82	88	68
Palmetto Elementary School	447	60	65	53
Sabal Palm Elementary School	538	67	70	51
Veterans Memorial Elementary School	811	82	84	77
Vineyards Elementary School	822	76	81	65
NCA Projected Weighted Baseline	5,717	71	77	65

Table 5.2 FSA Results by School

School	Students	3rd Grade ELA	4th Grade ELA	5th Grade ELA	3rd Grade Math	4th Grade Math	5th Grade Math	5th Grade Science
Big Cypress Elementary School	890	65	66	75	71	59	65	71
Corkscrew Elementary School	596	81	73	74	89	77	75	73
Estates Elementary School	652	60	66	57	60	82	73	52
Laurel Oak Elementary School	961	80	85	78	87	89	82	66
Palmetto Elementary School	447	54	58	56	51	71	66	48
Sabal Palm Elementary School	538	72	64	59	80	64	63	51
Veterans Memorial Elementary School	811	85	78	81	90	76	82	76
Vineyards Elementary School	822	79	80	72	82	84	78	64
Weighted Totals/Average	5,717	73	73	71	78	76	74	64

Goals and Objectives for Improving Student Achievement

Based upon the expected incoming baseline performance, the goals for academic growth and improvement that students are expected to show each year are provided below. This also includes the rationale for those goals. Acclimating students to the classical curriculum at various ages in the early years is challenging, because success in the upper grades can be dependent upon knowledge and skills attained in the lower grades to an extensive degree. Therefore, we expect slower growth initially as many new students will not have the benefit of previous foundational years of classical education. However, as NCA's founding students advance, we expect accelerated growth rates in years five and beyond.

Table 5.3 Outyear Results

Out-Year Results	ELA	Math	Science	Rationale
NCA Baseline	71	77	65	
First Year Results	74	80	68	A three-point increase is expected in the first year.
Second Year Results	77	83	71	A three-point increase is expected in the second year.
Third Year Results	80	86	74	A three-point increase is expected in the third year.
Fourth Year Results	83	89	77	A three-point increase is expected in the fourth year.

Revision of Goals and Objectives for Improving Student Achievement

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 as follows: If the baseline is higher than anticipated, we may not be able to increase student achievement as much as planned. In this case, NCA will differentiate instruction for specific students. Given that the culture change and teaching methodology may have a temporary negative impact on student achievement scores, we do not expect a substantial increase the first year. However, we believe that as the students are acclimated and advance through the curriculum, results are expected to increase exponentially, as was experienced by Pineapple Cove Classical Academy in its first three years of operation. We will use some of the same methodologies used by PCCA. These include extended day and Enrichment/Remediation every day. See the chart below for PCCA performance.

Table 5.4 Pineapple Cove Achievement History

Pineapple Cove Achievement History		English Language Arts Achievement	Mathematics Achievement	Science Achievement	Social Studies Achievement
Year 1	2015-2016	72	53	41	0
Year 2	2016-2017	75	70	61	86
Year 3	2017-2018	73	71	64	85
Year 4	2018-2019	69	77	68	82

Evaluation of Goals and Objectives for Improving Student Achievement Success

Each year, the Florida Department of Education (FDOE)-reported results of student achievement will be compared with our goals and objectives. The comparison and analysis of our results will be reported to the NCA Board and subsequently to all parents. The analysis will include a breakdown of actual and expected results by subject, grade level, and various sub-groups, and discussion of success and areas for improvement. This will help to inform goals and objectives for the subsequent year.

How Desired Overall Results will be Attained Through Instruction

The desired results will be achieved by teaching to the standards of the curriculum and not to standardized tests, following the proven teaching methodologies and curriculum recommended by

BCSI, and consistent monitoring and support of students and teachers. The curriculum mapping to standards will be used to ensure that all standards are covered during the school year. If the student base has lower achievement in one subject, we will enhance instruction in that subject accordingly. BCSI has selected Riggs Phonics, Singapore Math, and Core Knowledge Sequence curricula, which are being used successfully in BCSI schools across the country. NCA will follow the best practices adopted by the other BCSI network schools in regard to implementing this curriculum with fidelity. We will ensure that teachers are well prepared for instruction through professional development provided by BCSI. Additional support may be provided by Riggs, Singapore, Core Knowledge, or other instructors if needed. NCA will also provide support to students to help them to be ready to learn at all times, making the teachers' instruction more effective.

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.

Mission-Specific Educational Goals

Beginning in sixth grade, students at NCA will begin learning formal Latin, and will continue to do so through at least eighth grade. The teaching of Latin is an integral part of the classical school's robust literacy curriculum. Latin provides insight into the meaning of over half of English words. Its complex grammar enables students to gain a critical knowledge of English sentence structure and composition. Latin offers a bridge to learning other languages. Knowledge of Latin allows one to achieve the heights of English literacy, since so many Latin phrases still find currency in modern speech: e.g. (*exempli gratia*), *ex post facto*, *ex officio*, *id est* (i.e.), *ex nihilo*, *ibid.* (*ibidem*), *gravitas*, *E pluribus unum*, A.D. (*Anno Domini*), *homo sapiens*, et cetera.

Latin was the language of scholarship for the majority of the last two thousand years, and is still used in the classification of living organisms. The goal of the Latin curriculum is, in part, to have students able to read at least some Virgil in the original as they are reading the *Aeneid* in translation in the freshman classical literature course. The teaching of Latin thus moves from being peripheral to other classroom subjects (but useful, nonetheless) to become complementary to the literature and history curricula. Latin instruction reinforces and extends the student's knowledge of English grammar, and strengthen skills in composition. These benefits are closely tied to the mission of the school, and certainly lend themselves towards producing the citizens and scholars that NCA hopes to see graduate.

Measures or Assessments to Be Used

Latin proficiency necessary for grade promotion in Grades 6-8 will be to earn a grade of C or higher. Since there is no state requirement for the study of Latin, grade levels 6 to 8 will exceed state standards. Performance will be assessed with classroom assessments and the National Latin Exam. Subsequent year Latin achievement level goals are based on the percentage of students earning a C or greater in Latin courses:

Table 5.5 Outyear Latin Result Projections

Out Year Results	Latin	Rationale
First Year Results	60	This will be the first year of Latin for NCA students
Second Year Results	62	A 2-point increase is expected each year.
Third Year Results	65	A 3-point increase is expected each year.

Out Year Results	Latin	Rationale
Fourth Year Results	69	A 4-point increase is expected each year.

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

Grade Level Placement Procedures

Kindergarten and 1st Grade

Kindergarten and 1st grade admission will be per state law, 1003.21(1)(a)(1) F.S.) and 1003.21(1)(b). Thus, any child who has attained the age of 6 years on or before September 1 of the school year and who has been enrolled in a public school or who has attained the age of 6 years on or before September 1 and has satisfactorily completed the requirements for kindergarten in a private school from which the district school board accepts transfer of academic credit, or who otherwise meets the criteria for admission or transfer in a manner similar to that applicable to other grades, shall progress according to the school's student progression plan.

Grades 1-5

Grades 1 through 5 students will be placed in the appropriate grade based on their placement earned in their prior school. Students coming from homeschool and private school will be required to provide transcripts prior to placement. The NCA dean of students will review transcripts for proper grade placement.

Grades 6-12

Florida Administrative Code Rule 6A-1.09941, for Grades 6-12, grades earned and offered for acceptance shall be based on official transcripts and shall be accepted at face value subject to validation. This includes out of country transfers, retained students and students transferring from adult education or other high school programs. If validation of the official transcript is deemed necessary, or if the student does not possess an official transcript or is a home education student or private school student, successful completion of courses shall be validated through performance during the first grading period as outlined below. Assessment requirements for high school transfer students under section 1003.4282, F.S., must be satisfied.

Validation of courses shall be based on performance in classes at NCA. A student transferring into NCA will be placed at the appropriate sequential course level and students in Grades 6-8 should pass each required course at the end of the first grading period. Students in Grades 9-12 should have a minimum grade point average of 2.0 at the end of the first grading period. Students who do not meet this requirement shall have courses validated using the Alternative Validation Procedure below.

Alternative Validation Procedure: If validation based on performance as described above is not satisfactory, then any one of the following alternatives identified in the NCA Student Progression Plan shall be used for validation purposes as determined by the principal:

1. Portfolio evaluation by the principal or designee;
2. Demonstrated performance in courses taken at other public or private accredited schools;
3. Demonstrated proficiencies on nationally-normed standardized subject area assessments;
4. Demonstrated proficiencies on the Florida Standards Assessment and on End of Course (EOC) assessment(s) for courses as applicable;
5. Review of the criteria utilized for a given subject provided by the former school; or
6. Review of transcripts and sending school's curriculum.

Course Placement Procedures

If there are any concerns regarding courses, placement tests may be administered. These include Singapore Math placement tests to facilitate ability-grouping. If a student masters 80 percent or more of the content, he or she may be permitted to move up a level.

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.

The school does not intend to use the school district’s pupil progression plan, although we will adhere to Florida’s statutory requirements for promotion and retention of public-school students pursuant to F.S. 1008.25. We have provided the NCA pupil progression plan as Attachment E.

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.

Graduation Requirements Determination Methods

The college advisor (see job description) will be hired in the fourth year and will be responsible for ensuring graduation requirements are met for each student. For each year that a graduating class is going through their high school grades, their graduation status will be tracked using a personalized tracking database. The following items will be tracked and may change based on the graduating year and current Florida statute:

1. Credits earned status
 - a. ELA (4 credits)
 - b. Mathematics (4 credits): Algebra 1; Algebra 1 EOC passed; Geometry
 - c. Science (3 credits): Biology (1); 2 lab courses
 - d. Social Studies (3 credits): United States History (1); World History (1); Economics (.5); U.S. Government (.5)
 - e. Fine or performing arts, speech and debate, or practical arts (1 credit)
 - f. HOPE or equivalent PE course (1 credit)
 - g. Electives (8 credits)
2. One online course
3. Cumulative grade point average (GPA) of 2.0 on a 4.0 scale

NCA’s Additional Graduation Requirements (Generally Taking the Place of Electives)

1. Credits earned status
 - a. ELA—5 credits in total: Composition (.5); Rhetoric (.5)
 - b. Mathematics—4 credits in total: Algebra 2 (1)
 - c. Science—4 credits in total: Chemistry (1)
 - d. Social Studies—6 credits in total: Moral Philosophy (.5); Western Civilization I (1); Western Civilization II (1)
 - e. World Language—3 credits in total: Latin (1)
 - f. A Senior Thesis: A 20-page senior thesis is required for graduation. It is typically completed in the senior year in addition to the 12th-grade literature course.

High School Graduation Requirements for Students with Disabilities

Students with disabilities entering grade nine may attain a standard diploma and earn standard diploma designations by meeting the requirements in sections 1003.4282(1)-(8) or 1002.3105(5) or 1003.4282(10) and 1003.4285 Florida Statutes (F.S.)

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

Promotion of students through graduation and achievement of a high school diploma is critical to the mission of NCA. Parents will be informed of and frequently reminded of requirements and standards for promotion during informational sessions, orientation, and communication with NCA teachers and staff, especially the college advisor. NCA's website will also contain our progression plan and graduation requirements. At the beginning of each school year, the progression plan will be provided to new and returning parents. High school student orientation will also review graduation requirements with students and parents with frequent discussion of the progression plan by administrators, instructional personnel, and counselors. The college advisor will communicate frequently with both students and parents on progress towards NCA graduation requirements. NCA's goal is to achieve a 100 percent high school graduation rate.

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.

NCA Interim Assessments

Baseline assessments will be performed at the beginning of the year to help place students in the proper level. Examples of these tests are:

- Florida Kindergarten Readiness Screener (FLKRS) - The screening instrument, known as the Florida Kindergarten Readiness Screener (FLKRS), must be administered to all public-school kindergarten students within the first 30 days of each school year.
- Singapore Math Placement Tests - Students who switch to Singapore Math from another curriculum may not have the necessary background to begin at the level corresponding with their grade level without review from earlier levels. We will use placement tests to determine where to place students new to Singapore Math, and do so based on ability. A student must master at least 80 percent of the content before they can move up a level.
- Reading Assessment Tests - To identify where students are in reading speed and comprehension.
- Dynamic Indicators of Basic Early Literacy Skills (DIBELS) Assessment Tests - Administered at the start of the year for Grades 1 through 6.
- Northwest Evaluation Association (NWEA MAP) - NWEA MAP assessments are used to measure each student's progress or growth in school.
- The Iowa Test of Basic Skills (ITBS) - Developed by the College of Education at the University of Iowa, the ITBS is used to monitor year-to-year progress and can help

supplement teachers in their observations about student capabilities, such as what are a student's most and least developed skills.

Ongoing interim tests are administered as required.

- Singapore Math Placement Tests - Administered at least twice more during the year or as needed.
- Riggs Spelling Assessment Tests - Daily spelling mastery is assessed using a rotating 30-word test for Grades 1 through 6. This is a monthly test using the Riggs Orthography Scale which tests mastery of spelling patterns.
 - Phonics/Handwriting - Tested daily until mastery; reviewed regularly.
 - Spelling - Tested daily; the normed monthly Riggs' Orthography Scale is given nine times per year.
 - Comprehension - Normed McCall-Crabbs Standard Test lessons in reading given two to three times weekly.
 - Cognition - The Reading Acts Test (Riggs).
 - Composition/Grammar - Portfolios of composition and grammar work are maintained for assessments in those areas and will be assessed monthly for grade level work.
- DIBELS Assessment Tests - Administered twice more during the year for Grades 1 through 6.
- Core Knowledge Sequence Assessments - Administered throughout the year to evaluate the specific content in the units and lessons being taught in Core Knowledge Sequence classrooms. The assessments are formatted so that they give teachers options to use for differentiating instruction. Each topic in the Core Knowledge Sequence is covered with at least one question. Core Knowledge Sequence assessments will include ELA, science and social studies.
- Classroom Tests - Administered weekly; developed by teachers and/or NCA staff. These assessments will include mathematics, ELA, science and social studies.
- Formative Assessments - Classwork, presentations, portfolios, etc. will be evaluated weekly throughout the year as indicators of student progress.

Rationale for Selecting Assessments

These assessments were selected with the intent to measure student progress towards mastery of the Florida Standards. Each of the above assessments have proven themselves as useful tools for student progress assessment.

Assessments Alignment with NCA's Curriculum, Performance Goals, and State Standards

Each of the following assessments align with the NCA curriculum, performance goals and the FSS since they are created by the curriculum author and have been aligned to the FSS by the NCA team.

- | | |
|---------------------------------------|-------------------------|
| • Singapore Math Placement Tests | • Classroom Tests |
| • Riggs Spelling Assessment Tests | • Formative Assessments |
| • Core Knowledge Sequence Assessments | • DIBELS Assessment |

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?

Instruction Evaluation and Modification Based on Student Assessment Results

Student assessment and performance data will be regularly assessed by the principal, dean of students (who is equivalent to an assistant principal: see job description), teachers and other administration to guarantee that all students are receiving the support and instruction necessary. The dean of students will be responsible for managing the data and evaluating performance data and interpreting it for classroom teachers to make necessary improvements. The principal will be coordinating the professional development of teachers to improve student achievement. BCSI may also assist with evaluation of summary student performance data and make recommendations to the principal. NCA will rely heavily upon our experienced and well-trained teachers to be constantly aware of individual needs within their classrooms. Teachers and administrators will apply the data gathered to drive the intervention strategies and progress monitoring methods, making sure that each is an efficient use of time and resources. Students who do not meet state performance levels in reading, writing, mathematics, science, civics and history will be supported with the following procedures: (1) Identify the student's specific need. (2) Select the interventions for the subject. (3) Select the curriculum modifications that will be provided. (4) Establish the appropriate monitoring process to evaluate the student's progress.

Initially the school operations manager (and then starting in the second year, the project coordinator) will be responsible for ensuring teachers are aware of the assessment schedule, helping teachers understand how to prepare their students, and taking the lead in test administration. Teachers and administrators will hold team meetings to discuss the growth and progress of individual students. The curriculum allows for ease in differentiation, so teachers will be able to readily accelerate or reinforce a student's learning. At middle school levels, by offering accelerated and remedial course work, the school will be able to pace students according to their instructional needs. In middle school, the counselor will work closely with students to ensure proper class placement and promotion. Remedial and intensive courses will be implemented for students who score level 1 or 2 on FSA math and/or reading.

For each student who does not meet state performance levels in reading, writing, mathematics, science, civics and/or history, the school, in consultation with the student's parent, will develop and implement progress monitoring to assist the student in meeting expectations for proficiency. Strategies may include, but are not limited to, summer school, dropout prevention services, parent tutorial programs, modified curriculum, reading instruction, after-school instruction, and other extended day services including tutoring, mentoring and intensive skills development programs.

It is the intention of NCA to use progress monitoring, unless the student has a disability and receives services on an IEP that more appropriately can address the identified deficiencies. NCA may recommend that low performing students attend remediation programs held before or after regular school hours or during summer.

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

The dean of students will serve as the in-house expert who will coordinate the ongoing training of NCA's teachers to interpret and improve student assessment results. He or she will attend trainings offered by the district, state, and other organizations in preparation for proper analysis and use of

assessment data. The dean of students will regularly analyze student performance data and will meet with teachers to review data and create plans and strategies as needed to improve students at all levels of achievement. Teachers, who are daily interacting with students and assessing their performance, are the first line in identifying potential areas of need, and are expected to proactively raise concerns so student performance deficits can be mitigated and remediation maximized. NCA also recognizes the importance of sharing assessment results with parents and the general community. The dean of students will be responsible for the effective dissemination of this information to parents.

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.

Corrective Action Trigger

Progress of the school will regularly be communicated to the governing board, the Sponsor as required in the charter contract and applicable laws, as well as the school's parents. If the school falls short of student academic achievement goals set forth by the school's stated goals or applicable standards in the charter contract, School Improvement Plan (if applicable) or applicable laws at the school-wide, classroom, grade level, any other measured sub-group, or individual student level, the school will perform an analysis of the root cause as set forth below.

Corrective Actions

The dean of students, with the support of the school's administrators, instructional staff, and counselors, would initiate the following corrective action based on the results of data analysis, to include:

1. Improving instruction
2. Supplementing the curriculum
3. Better aligning the curriculum to tested content (address timing issues, etc.)
4. Revising the curriculum

BCSI will also be consulted on the analysis and corrective actions to be implemented. Ongoing monitoring will be conducted to ensure desired results.

Corrective Action Responsibility

All school personnel are responsible for implementation of any needed corrective action plans. Day-to-day implementation of these actions will be the responsibility of the dean of students. Progress will be communicated regularly to the principal and, as needed, to the governing board and the Sponsor.

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

Students and parents will have online access to student grades on a real-time basis. Interim report cards will be distributed to students earning below a C. Quarterly report cards, including teacher comments, will be provided to parents. Also, regularly scheduled parent-teacher conferences will be offered. Teachers in the lower grades will send graded work, tests, and additional notes (as needed) on a weekly basis in the parent communication folder. FSA and other standardized assessment results will be provided to parents on a timely basis.

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

NCA is committed to protecting student privacy while allowing parents and guardians appropriate access to student education records. Parents will have a private online account to monitor student achievement. No student academic performance data or student-specific information will be accessible by the general public. NCA will adhere to the requirements of the Family Education Rights and Privacy Act (FERPA) and will provide regular and ongoing training to school staff and personnel on the law and the school's policies and procedures to ensure compliance. Parents will be notified of their rights under FERPA as required by the law and the standards set by the Sponsor as the Local Educational Agency for FERPA protects.

Generally, schools must have written permission from the parent or eligible student in order to release any information from a student's education record. The information released is only that which is specifically described in the executed FERPA release. However, FERPA allows schools to disclose those records, without consent, to the following parties or under the following conditions:

- School officials with legitimate educational interest;
- Other schools to which a student is transferring;
- Specified officials for audit or evaluation purposes;
- Appropriate parties in connection with financial aid to a student;
- Organizations conducting certain studies for or on behalf of the school;
- Accrediting organizations;
- To comply with a judicial order or lawfully issued subpoena;
- Appropriate officials in cases of health and safety emergencies; and
- State and local authorities, within a juvenile justice system, pursuant to specific state law.

Access to records will be restricted internally via network permissions. FERPA information within the school will only be accessed by school personnel with a specific reason to access such information. Access and distribution of private information will be logged accordingly and monitored by the school's administration. Administrators will be trained when to consult with the school's legal counsel.

Section 6: Exceptional Students

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

The FDOE report "2019 LEA Profile" was used as a source of data for the percentage of disabled students in CCPS as 14 percent (accessed at:

<http://www.fldoe.org/core/fileparse.php/7672/urlt/Collier19.pdf>). This is approximately the same weighted average percentage of ESE students in the school zones concurrent with and adjacent to the anticipated location of NCA. The projected NCA enrollment for students with disabilities is 10 percent, based on the tendency of parents of ESE students to self-select an established district school over a new startup with no history of serving ESE students. NCA plans to include a ratio teacher to student of 20:1. This will be adjusted when enrolling IEPs are evaluated. We have included two ESE teachers and a Student Services Director in table 6.1.

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.

NCA will ensure that all students, including those with disabilities have an equal opportunity of being selected for enrollment as set required under Florida Statutes Section 1002.33(10)(b). NCA's enrollment application nor NCA's staff will not ask for any information related to whether a student is in need of ESE services prior to processing the student's application

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).

NCA is fully committed to ensuring that all students with disabilities receive a free appropriate education (FAPE) in the least restrictive environment (LRE) in accordance with federal, state, and local law. As described above, NCA's IEP Student Services Team will work closely with CCPS to determine a student's requirements and whether the school is the appropriate placement for a student with his/her disabilities using the following steps:

1. NCA will attend training on and follow CCPS processes and procedures related to student placement decisions.
2. NCA and CCPS will work with the parents to determine the exceptional student education and related services and accommodations, which will be needed for the student's education. When appropriate, an IEP Student Services Team will be assembled in accordance with federal and state law and administrative codes. Proper notices will be given to parents in advance of an IEP meeting.

Generally, placement decisions will occur within 10 business days of CCPS's receipt of the registration materials. An emergency meeting may be called when registration occurs during the school year or when there are less than 10 business days to the start of school. This will ensure every student receives a FAPE in the LRE environment while ensuring the students IEP is adhered to on day one of school.

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

NCA understands the importance of effectively identifying all students with disabilities so they may be provided a FAPE in the LRE through the Child Find process. NCA's IEP Student Services Team will use the Multi-Tiered System of Supports (MTSS)/Response to Intervention (RtI) model to identify such students so that proper interventions or accommodations can be provided. NCA's IEP Student Services Team will review assessment data and school records of all students and identify interventions needed to improve student assessment results. The supports will be integrated into a continuum of evidence based academic and behavioral interventions.

Intervention procedures will include:

1. Parent involvement in general education intervention procedures
2. Observations of student in the educational environment
3. Review of data
4. Sensory screenings and diagnostic assessments
5. Implementation of evidence-based interventions

NCA may not require general education interventions for students suspected of having a disability if the student demonstrates a speech disorder; or severe cognitive, physical, or sensory disorders; or severe social or behavioral deficits that require immediate intervention to prevent harm to the student or others; and the IEP Student Services Team along with qualified professionals and the parent determines that these general education interventions are not appropriate.

Should the IEP Student Services Team determine that a student may have a disability requiring ESE services, the team will seek parent consent for evaluation by CCPS's Evaluation Specialist to determine the student's eligibility for ESE services. This will be completed within the mandated 60 calendar days after receipt of parental consent. Rule 6A-6.0331(3)(g), F.A.C.

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.

Exceptional Student Education Program Overview

NCA's IEP Student Services Team will collaborate on how to provide the LRE for students with disabilities. This decision will be driven by the student's IEP. The IEP Student Services Team will review each student's IEP to ensure the student's needs will be fully served. Typically, the IEP documents the need for special education or related services in areas including counseling, speech therapy, language therapy, occupational therapy and physical therapy. The setting (either in the regular classroom or ESE setting) for these services will be determined by the IEP NCA is committed to ensuring that each ESE student will have the opportunity to be included in the regular classroom environment to the maximum extent possible.

NCA will follow a systematic approach (Three-Tier Model) for providing student interventions, identifying struggling students before they fall behind, and providing them with support throughout the educational process.

The MTSS Model is as follows:

- Tier 1 (core instruction and universal supports available to all students): Tier 1 consists of the general academic and behavioral instruction and support that is designed and differentiated for all students in all settings. School-wide progress monitoring and screenings are used to ensure that core instruction is effective and to identify students who may need additional support in order to be successful.
- Tier 2 (supplemental instruction or intervention provided to targeted groups of students with marked difficulties, who have not responded to Tier 1 efforts): Tier 2 consists of more focused, targeted instruction or intervention and supplemental supports in addition to and aligned with the core instruction provided through Tier 1. The team selects a research-based intervention designed to address the specific deficit area. On-going progress monitoring is utilized to determine the effectiveness of the interventions. The team analyzes the progress-monitoring data to determine the need to continue the current interventions, discontinue due to successful remediation, select a new intervention and/or intensify the level of interventions at Tier 3. Will include small groups, push-in classroom services, and/or pull-out resource services. For instance, an additional 30 minutes per day

- may be devoted to reading in a small group (3-6 students), with a focus on building accurate and automatic recognition of words in text. Adjustments can be made within Tier 2 to increase time on task or decrease student/teacher ratio.
- Tier 3 (intensive individualized intervention and supports provided to individual students with marked difficulties who have not responded to Tier 1 or Tier 2 efforts): Tier 3 consists of the most intense (increased time, narrowed focus, very small group or individual) instruction and intervention based upon individual student need. Tier 3 supports are provided in addition to and aligned with the core (Tier 1) and supplemental (Tier 2) academic and behavioral instruction, interventions, and supports. Progress is monitored weekly. Will include push-in and/or pull-out resource services, individual counseling as determined by team.

The tiers are not a “set” series of interventions or activities that all students move through. Rather, they are fluid and flexible; students may move from a lower to a higher tier and back again, based on documented need. A student may be successful with Tier 1 supports for behavior and mathematics, require supplemental Tier 2 instruction for reading, and need intensive Tier 3 interventions for writing. As the student progresses and the performance gap with grade level and classroom peers closes, the student may no longer need anything beyond Tier 1. The MTSS framework is designed for all students, including general education students and ESE students with IEPs or EPs. “All students” includes those who struggle, those who excel and demonstrate needs beyond the core, and those who are English language learners. If the school’s problem-solving (MTSS implementation) team determines that a student is not making adequate progress after the provision of effective Tier 1, Tier 2, and Tier 3 intervention and supports for an appropriate amount of time, or that the services are effective but may require substantial and sustained effort that may include special education and related services in order to maintain progress, the team will refer the student for evaluation for exceptional student education.

Upon the continuum of ESE services to be provided at NCA are consultation services, where an ESE teacher and classroom teacher will meet to implement and monitor instructional alternatives designed for the success of the student. Data may be collected by either teacher and records will be maintained by the ESE teacher. The next level on the continuum of services provided at NCA are pull-out services, which are those services that cannot be provided within a regular classroom environment during normal instructional time. For pull-out services, an ESE teacher provides total instruction and focused services in which one or a few students being served are students with exceptionalities. The setting for this service delivery model is other than the general education classroom for a period of the school day. Math instruction will occur at the student’s academic level rather than grade level.

ESE students will participate via a resource setting or a pull-out model depending on the number of ESE students served at the same time with similar IEP goals.

Student Services Director Role

NCA will employ a student services director (see job description) who will oversee ESE and 504 Plan processes and compliance. The student services director will coordinate training sessions between all exceptional student education and related services providers and general education teachers at the beginning of the school year to confirm that the general education teachers understand the IEP requirements of individual students. The IEP Student Services Team will also be briefed on how to design instruction material for the exceptional education student, and to monitor progress against

student's IEP requirements. Similar meetings will be conducted in the event that an exceptional education student is identified later in the year.

The Student Services Director will work with exceptional student education and regular education staff to build plan schedules to ensure that all students receive the exceptional student education as required by their IEPs.

The Student Services Director will track each ESE student's IEP due dates. These tracking mechanisms will be used to control when IEP meetings are held throughout the year. The Student Services Director will oversee the ESE teachers and will be tasked with being the primary point of contact with the sponsor. The Student Services Director will report to the principal on issues related to ESE.

504 Accommodation Plans

The exceptional student education director will also ensure compliance with Section 504. Section 504 Plans are for students with a verifiable disabling condition which may include physical, medical, or mental needs. Students with a 504 Plan are offered accommodations to help make school, classrooms, and other educational settings more accessible and to ensure that the students receive a free appropriate public education. These accommodations are meant to level the playing field and create greater accessibility for the disabled student in the learning environment. 504 services are needed in order for the students' educational needs to be met as adequately as those of non-disabled peers.

Exceptional Student Education and General Education Teacher Roles

The ESE teacher and the general education teacher will meet regularly to plan, implement, and monitor instructional alternatives.

The ESE teacher provides exceptional student education advice to the general education teacher who will be endorsed in the core content area. The general education teacher will be primarily responsible for core content instruction for students who spend more than 80 percent of their time with their non-disabled peers. The ESE teacher will be primarily responsible in ensuring IEP goals are met along with the general education teacher.

The ESE teacher provides exceptional student education advice to the general education teacher who will be endorsed in the core content area. The general education teacher will be primarily responsible for instruction.

The ESE teacher provides the general education teacher counsel on the student's IEP accommodations, usage of exceptional student education skills in the general education setting, and tracking of student's progress against the IEP goals. The ESE teacher works with the general education teacher to develop methods of meeting the student's needs and also provides support in the regular classroom to provide direct service to the students with disabilities during the instructional period, as required by the student's IEP.

District Evaluation Specialist Role

NCA will utilize an evaluator provided by CCPS to perform a formal evaluation of the student. At the conclusion of the evaluation, the results will be presented to the NCA IEP Student Services Team.

Exceptional Student Education Strategies

Strategy planning will consider those recommended by the Learning Disabilities Association of America. These can be found at <https://ldaamerica.org/successful-strategies-for-teaching-students-with-learning-disabilities/>:

- break learning into small steps;
- administer probes;
- supply regular, quality feedback;
- use diagrams, graphics and pictures to augment what they say in words;
- provide ample independent, well-designed intensive practice;
- scaffolding;
- model instructional practices that they want students to follow;
- provide prompts of strategies to use; and
- engage students in process type questions like “How is the strategy working? Where else might you apply it?”

Exceptional Student Education Supplemental Supports and Services

Once the IEP Student Services Team identifies a student that needs extra services, they will meet to reevaluate and specify accommodations and services that support required learning.

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.

NCA will collaborate with CCPS’s ESE staff to ensure each student’s needs are taken into careful consideration, and that each ESE student will have the opportunity to be included in the regular classroom environment to the maximum extent possible. If a student with a disability has education needs requiring a regular classroom and resource room combination with 40-80 percent of instruction occurring with non-disabled peers, NCA’s IEP Student Services Team, with direction primarily from the Sponsor’s placement specialists, will review the student’s IEP to determine the student’s needs and whether NCA can provide that student with a FAPE.

Every effort will be made to serve each student to the best of NCA’s ability. NCA agrees that it will provide ESE services at NCA at the same level of service provided by the Sponsor at each of the Sponsor’s neighborhood schools. Additional services may be provided when indicated in the student’s IEP. This may include, but not limited to, speech therapy, language services, or occupational therapy. If necessary and appropriate, the IEP Student Services Team may determine that the student’s IEP can be amended to provide equivalent and effective accommodations to best meet the student’s needs. If it is determined that NCA is unable to meet the student’s needs, NCA will work closely with CCPS and the parent(s) or guardian to determine the appropriate placement for the student to meet their unique needs

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.

NCA will collaborate with CCPS's ESE staff to ensure each student's needs are taken into careful consideration, and that each ESE student will have the opportunity to be included in the regular classroom environment to the maximum extent possible. If a student with a disability has education needs requiring a separate classroom with less than 40 percent of instruction occurring with non-disabled peers, NCA's IEP Student Services Team will review the student's IEP to determine whether NCA can provide that student with a FAPE. Every effort will be made to serve each student to the best of NCA's ability. If necessary and appropriate, the IEP Student Services Team may determine that the student's IEP can be amended to provide equivalent and effective accommodations to best meet the student's needs. If it is determined that NCA is unable to meet the student's needs, NCA's IEP Student Services Team will work closely with CCPS and the parent(s) or guardian to determine the appropriate placement for the student within CCPS's full continuum of services.

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).

1. Student Monitoring

- a. NCA will establish procedures for collecting and reporting to CCPS and the FLDOE.
- b. The Student Services Director and dean of students will be assigned to collect data.
- c. This data will be reviewed for all students (including students with disabilities and gifted students).
- d. Likewise, ESE teachers and the general education teachers will work together to review student progress to determine if students are meeting the goals and objectives of their IEPs or 504 Plans.

2. Periodic Reporting

Periodically, NCA staff will review all ESE student records to ensure that the ESE program is fulfilling its purpose. This periodic reporting will include:

- a. Quarterly: IEP progress notes or similar progress and achievement monitoring system.
- b. Quarterly: Discipline/attendance data for students with disabilities.
- c. Annually: IEP goal progress to their respective parents.
- d. Annually: Promotion/retention rates of ESE students.
- e. Annually: ESE students' assessment data will be reviewed. This includes the annual state mandated assessments.
- f. Note the MTSS program as outlined in section E.

3) Graduation

Whenever possible, NCA will provide each ESE or 504 student the opportunity to pursue a standard diploma. NCA will provide all lawfully required opportunities for its students to graduate from high school. The ESE teacher, classroom teacher, and guidance counselor will work closely to ensure that the student's IEP or 504 Plan is followed. They will maximize opportunities for success, helping the student learn to be his own advocate.

NCA will collaborate with CCPS to determine current graduation requirements and diploma options available for ESE and 504 students.

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

Exceptional student education staff will include an exceptional student education director who manages the ESE program and supervises ESE-certified teachers' implementation of students' IEPs. Over all ESE staffing will be based on an increasing number of ESE students as listed in the following table:

Table 6.1 ESE Staffing

	Year 1	Year 2	Year 3	Year 4	Year 5
Grades K-3	441	447	423	399	357
Grades 4-8	345	450	560	550	550
Grades 9-12	0	0	0	100	200
Total Students	786	897	983	1049	1107
Percent of ESE/Gifted	14%	14%	14%	14%	14%
Total ESE Students	110	126	138	147	155
Student Services Director/Teacher	1	1	1	1	1
Speech Teacher Consultant	1	1	1	1	1
ESE Endorsed Teachers	4	5	5	6	6
Total ESE Staff	6	7	7	8	8
Student Ratio/Teacher	18	18	20	18	19

If the school registers the number of exceptional students identified above, it will staff (in the first year) at least a Speech Therapist, two certified ESE teachers, 4 ESE endorsed teachers, the Student Services Director (who will also perform as a ESE teacher) to participate on the IEP Student Services Team and to provide ESE services which will be determined by the IEPs and the needs of the students. Once actual enrollment numbers are determined, an exact staffing plan for ESE personnel will follow; therefore, the number and qualifications of staff will be determined by actual enrollment.

Specialty staff (i.e., speech/language pathologists, occupational therapists, physical therapists, counselors, etc.) will be hired or engaged in a consulting agreement to support students' needs as reflected on their IEPs.

The Student Services Director will make review of IEPs of registered students a priority and will ensure that due diligence is performed in this regard. This review will determine which of these ESE specialty services will be needed and will implement consulting agreements to allow required services to be provided during the school year. The exceptional student education director will schedule specialty services such that those services identified on each student's IEP are fully provided.

Staff Development

The school will hire teachers who will be either ESE or gifted certified/endorsed. The school will provide opportunities for staff to participate in ESE staff development opportunities and encourage

dual certification for teachers. Staff training will also be provided on guidelines and procedures established by the district related to meeting the needs of gifted students. The school's professional development program for its teachers will include participation in the training provided by the district for exceptional student education services.

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

The school's effectiveness in serving exceptional education students will be evaluated as follows:

1. Student Monitoring

- a. The school will establish procedures for collecting and reporting to the district and the FLDOE.
- b. The Student Services Director and dean of students will be assigned to collect data.
- c. This data will be reviewed for all students (including students with disabilities and gifted students).
- d. Likewise, ESE teachers and the general education teachers will work together to review student progress to determine if students are meeting the goals and objectives of their IEPs.
- e. Gifted teachers will work with the general education teachers on monitoring progress towards implementation of students' IEPs.

2. Periodic Reporting

Periodically school staff will review all exceptional education student records to ensure that the ESE program is fulfilling its purpose. This periodic reporting will include:

- a. Quarterly IEP progress notes or similar progress and achievement monitoring system.
- b. Quarterly discipline data for students with disabilities.
- c. Annual IEP/EP goal progress to their respective parents.
- d. Annual promotion/retention rates of exceptional education students.
- e. Annual exceptional education students' assessment data will be reviewed. This includes any state mandated assessments.

3. Parent Surveys

- a. The school will conduct parent/teacher conferences for all students.
- b. During the parent/teacher conferences, parents will be provided an opportunity to discuss their child's progress with both the ESE teacher and the general education teacher.
- c. NCA will conduct annual parent surveys which will include an opportunity for parents to comment on their experience with the school's ESE staff and services.

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

Gifted students who require an additional challenge will participate in a push-in model that will provide supplemental curriculum. The push-in model will occur within the regular classroom, allowing the teacher to differentiate instruction based on the student's needs and EP. Differentiation may include acceleration of content learning, in-depth project-based learning, increased complexity in content, and curricular adjustments.

NCA's curriculum provided and supported by BCSI, lends itself towards acceleration for its gifted students. For example, when students are assigned to read a book such as Robinson Crusoe in fourth grade, a student could read the unabridged version rather than the adapted version. Another example is foreign languages including Latin are also part of the classical curriculum and can increase complexity in content for students. Students who test beyond grade level in math could attend a math class above their grade in an acceleration model.

The school will conduct gifted screenings and consult with district personnel. Students will be monitored as they are promoted. Meetings will be held to develop and revise the EP at least once every three years for students in grades K-8. EPs may be reviewed more frequently, as needed, particularly when a student transitions from elementary to middle, and middle to high school. EP plans will be accessible to all the student's teachers who are responsible for implementation. A teacher who is gifted endorsed will be a part of the IEP Student Services Team when reviewing gifted EP plans.

The charter school is responsible for providing and paying for any related services to students according to the Individual Education Plan (IEP). Services such as occupational therapy and/or physical therapy may need to be contracted with private agencies to obtain qualified therapists if the school does not contract with the Sponsor for these services. Speech/language therapists must also be contracted or hired by NCA.

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.

In the surrounding school zones and communities, approximately 10 percent of students are English Language Learners (ELL), according to our analysis using CCPS and Florida Department of Education data. Spanish is the most common non-English language spoken in the surrounding schools, with 44% Hispanic students. NCA will use the results of the Home Language Survey to plan ELL services accordingly. NCA will follow all state and federal laws to meet the needs of all English Language Learners (ELL) ensuring their right to equal access to all education programs. This includes, but not limited to:

- Consent Decree found in Section 1003.56, Florida Statutes
- Rules 6A-6.0901 to 6A-6.0909; 6A-6.09022; 6A-6.09091; 6A-1.0503, Florida Administrative Code (FAC)
- Elementary and Secondary Education Act of 1965
- Title VI and VII of the Civil Rights Act of 1964
- Equal Educational Opportunities Act of 1974
- Consent Decree in the League of United Latin American Citizens et al. v. Board of Education, 1990
- Florida Educational Equity Act, 1984
- Fifth Circuit Court decision in Castaneda v. Pickard, 1981
- Supreme Court decisions in Plyler v. DOE, 1982; Lau v. Nichols, 1974
- Equal Educational Opportunities Act of 1974
- Section 504 Rehabilitation Act of 1973

- Office for Civil Rights Memorandum of May 25, 1970
- Office for Civil Rights Standards for the Title VI Compliance

NCA's mission of the English for Speakers of Other Language (ESOL) program is to rapidly develop English language proficiency in writing, listening, speaking, and reading to support bilingual students in communicating effectively at school, home and in the community. ELL students will be provided instruction that is grade appropriate and tailored to each student's proficiency level.

English Language Learners Identification Procedures Ensuring Equitable Access

NCA will ensure that students in ESOL programs have an equal opportunity of being selected for enrollment. The school's enrollment application does not request information on language proficiency. The enrollment procedures will be the same for ELL and non-ELL students. Bilingual volunteers or personnel will be used to assist parents with the enrollment process. Translation software may also be used to assist with communication.

Per Rule 6A-6.0902, FAC, all students will complete a Home Language Survey (HLS) when registering at NCA. The HLS includes questions regarding:

1. Student's native language
2. Primary language student uses most often
3. Primary language spoken in student's home
4. Birth country and city
5. Last school attended
6. Date entered U.S. school (DEUSS) system
7. Number of years student has attended U.S. schools

Registration assistance to parents in other languages will be available, upon request. If NCA cannot provide the application or the HLS in the student's or parent's native language, NCA will inquire for Sponsor support or seek a private provider of the service. School-based bilingual paraprofessionals, school personnel, and parents may assist in registration as available.

NCA will work with the Sponsor when legal changes occur with the HLS and application forms to accomplish adherence to mandated legal requirements. An HLS with a least one affirmative response will be immediately forwarded to the Student Services Director. The original copy is placed in the student's cumulative folder. The ESOL representative will take the following action:

1. The ESOL representative will immediately date stamp the copy
2. The ESOL representative will schedule to administer the English Language Proficiency (ELP) assessments within 20 school days of the student's initial enrollment
3. Data entry will input the proper information into the student information system
4. Parents are advised that the student will need a language assessment of English proficiency

English Language Proficiency (ELP) Assessment

The ESOL representative will be responsible for the administration of the required ELP assessments. NCA will follow the district's ELL Plan for assessment instruments and ensure all time tables are followed. The ESOL representative will also score the ELP assessments, and report the data to the ELL district office. If there is a delay in testing beyond the 20-day timeline, the ESOL representative will originate, email, and mail a hard copy of "Delay in Testing" letter home to the parent explaining why there has been a delay and a copy is also placed in the student cumulative folder.

In K-2, the listening and speaking assessment as well as the programmatic assessment are used to properly identify ELLs. In 3-12, students will be assessed using listening, speaking, reading and writing assessments. NCA will utilize ACCESS for ELLs 2.0 provided by the WIDA Consortium and will work with district ESOL staff for training adherence and guidelines.

NCA's ELL Committee will help manage services provided to the ESOL student. It will consist of:

- ESOL-endorsed teacher
- General education teacher
- Parent or guardian
- Principal or dean of students
- Guidance counselor or Student Services Director
- School ESOL representative

Students who score as Limited English Speaker (LES) or Non-English Speaking (NES) will receive ELL support services within the classroom through mainstream-inclusion models as appropriate. Any student who has tested as English proficient can be referred to the ELL Committee by school personnel or the parent for further consideration of ESOL program services. The ELL Committee may use any recommendation assessment instrument or other academic information to ensure that the student is placed in the instructional program or combination of instructional programs to best meet their academic needs. This will be documented in the student's individual ELL Plan. The final determination for placement will be decided by the principal or designee.

NCA's ESOL representative will communicate with parents of ELL student(s) to notify them of the ELL assessment and discuss possible placement outcomes.

Programmatic assessment (6A-6.0902, FAC) will take place by reviewing transcripts, class grades, interviewing the ELL student and parent(s) and assessment of the student's content mastery. Parental input regarding educational background will be taken into consideration especially when transcript, records, or report cards are not readily available. When students arrive with no records from their previous school, if the school is in the U.S., ESOL representative will reach out to the previous school to obtain the records. If the school that the student previously attended is outside of the U.S., ESOL representative will ask the family to see if they can assist in obtaining the records.

All areas will be considered when developing the ELL Plan. The student's academic ability will be determined outside of their English language fluency to ensure the classes recommended are grade appropriate.

Parent Notification and Involvement

For each ESOL student placement, the ESOL representative contacts the parent or guardian to inform them of the following:

- Reason for ELL identification
- Student's level of English proficiency, how proficiency was assessed, and status of academic achievement
- ELL programs available, which program was selected for the student, and the reason for the selection
- Exit requirements for the program and the parent's right to remove the student from the program at any time

Parents will be invited to participate in the ELL Committee meetings regarding their students.

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.

ESOL Instructional Programs

Mainstream-inclusion model will be NCA's main instructional model for both English language arts and core/basic subject areas. The ELL instructor, who is either ESOL endorsed or is working toward completing the ESOL endorsement within the required timeline, utilizes ESOL/WIDA strategies to provide comprehensible instruction. There will be constant assessment of each ELL student's understanding of content. Teachers will utilize ESE strategies and the MTSS framework for ELL students who encounter challenges or are at above or below grade level and would benefit from targeted interventions.

ESOL Instructional Practices

Bilingual ESOL endorsed teachers may push into the classroom to provide academic support or use a pull-out model to assist in providing comprehensible instruction. ELL students will be with non-ELL students based on grade level and academic ability. NCA will focus on promoting listening, speaking, reading, and writing skills to ensure ELL students make learning gains comparable to their non-ELL peers.

ESOL Instructional Strategies

Every teacher of an ELL student will develop and submit their ESOL instructional strategies to the ESOL representative to ensure ELLs are provided with comprehensible instruction in the classroom. Classical education use many of the ELL strategies that are employed by many districts. These are:

- | | | |
|--------------------------------------|--------------------------------------|----------------------------------|
| • Anticipatory KWL* Chart | • Journals | • RAFT |
| • Anticipatory Guide | • Language Experience Approach | • Ranking and Consensus Building |
| • Brainstorming | • Learning Logs | • Reader Response Chart |
| • Comprehension Check | • Multiple Intelligences Inventory | • Reading Log |
| • Corners | • PQRST Study Strategy | • Reflections |
| • Directed Reading-Thinking Activity | • Prediction | • Tableau |
| • Famous Person Mystery | • Question-Answer Relationship (QAR) | • Tap-A-Word |
| • Graphic Organizers | • Quickwrite | • Visualization |
| • Hot Topics | • Quickwriting | • Quickdrawing |
| • Idea Starts | | |
| • In-Text Questions | | |

*KWL = Already Know, Want to Know and Ultimately Learn

NCA will comply with state and federal law ensuring all teachers have the appropriate ESOL training and certification. Administration will be responsible to supervise the ESOL representative including reviewing the data and progress monitoring. Administration will conduct classroom walk-throughs and observations to confirm ESOL instructional strategies are being implemented while ensuring ELL

students are receiving instruction that is equivalent to non-ELL students.

The choice of program delivery is a school-based decision. It is based on our student population, resources available, cultural appropriateness, and ability to promote literacy that is on grade level to meet the ELL student's proficiency needs. Classical education is literacy-based which encourages language instruction and the proficiency of the Latin language. Learning Latin prefixes, suffixes, and roots will be utilized with all students (ELL and non-ELL). Classical instruction promotes diversity through our culturally responsive curriculum.

Below or above grade level student differentiation

Teachers will utilize similar instructional programs, practices, and strategies for ELL students who encounter challenges or are above, or below grade level and would benefit from targeted interventions, as they do for ESE students. These include:

1. **Collaboration between teachers**

Teachers are more effective if they share practices and develop a support network.

2. **Learn as much as possible about each student**

Learn about each student's background. This enables the teacher to be better prepared to provide appropriate instruction.

3. **Set high expectations for all students**

Teachers should not use "diluted curriculum". Instead, should utilize techniques to help students understand important material and "demonstrate what they know" in ways consistent with their language proficiency levels.

4. **Establish and utilize a library of research-based instructional strategies**

Having a broad array of strategies allows the teacher to handle many different learning profiles.

5. **Utilize multiple formats for presenting instructional material**

Providing ELLs with multiple methods of accessing instructional material increases their opportunity to comprehend the material. These include:

- books written in their first language
- books that have illustrations
- charts and maps
- simple text written by the teacher
- discussions
- etc.

6. **Use classroom assessment to inform instruction**

The use of weekly, informal classroom assessment results enables matching instruction to students' learning needs.

7. **Plan to use multiple assessment types**

Students respond to different assessment types differently. Finding an assessment that matches a student's learning profile and language proficiency ensures that each student can demonstrate what he/she knows.

8. **Differentiate homework assignments**

Assigning homework based on ability allows struggling students to succeed and above grade students to be challenged.

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

Monitoring and Evaluation Plans

NCA will use a variety of monitoring measures to determine the success of our instructional models and intervention programs. Data from a variety of sources including the WIDA ACCESS for ELLs 2.0, FSA, FCAT Science, FSAA, EOCs and other statewide assessments as well as English/language arts and core subject area assessments will be analyzed to measure student performance and progress made by ELL students. Classroom walkthroughs are also used to complement the quantitative data measures that are monitored. The student's ELL Plan will be updated annually, at the beginning of each school year, by the ESOL representative.

If the student is not progressing academically, an ELL Committee review will begin. The ELL Committee will review documentation (grades, performance tasks, teacher lesson plans, assessments) that must show evidence that the student has been provided instruction and accommodations appropriate to their English language proficiency level.

ESOL Exit (6A-6.0903 and 6A-6.09021)

ELLs will be assessed annually using ACCESS 2.0 - Assessing Comprehension & Communication in English for English Language Learners.

Students who score at the following levels on ACCESS 2.0 are deemed to be English language proficient and thus are eligible to be exited from ESOL program:

Grades K-2

- Scoring a level 4 or higher on the reading ACCESS 2.0 AND
- An overall composite proficiency score of 4.0 or higher OR
- Alternate ACCESS for ELLs 2.0 Composite proficiency level score of P1 or greater

Grades 3-9

- Passing score on the grade level FSA in ELA or the FSAA AND
- Scoring a level 4 or higher on the reading ACCESS 2.0 AND
- An overall composite proficiency score of 4.0 or higher OR
- Alternate ACCESS for ELLs 2.0 Composite proficiency level score of P1 or greater

Grades 10-12

- Passing score on the 10th grade FSA in ELA or the FSAA or concordant score sufficient to meet applicable graduation requirements AND
- Scoring a level 4 or higher on the reading ACCESS 2.0 AND
- An overall composite proficiency score of 4.0 or higher OR
- Alternate ACCESS for ELLs 2.0 Composite proficiency level score of P1 or greater

A request to be re-evaluated for English language proficiency to determine eligibility for exiting the ESOL program can be recommended by ELL Committee, ELL teacher, classroom teacher, counselor, administrator, or by the student's parents at any time in the school year (6A-6.0903, FAC). The ELL Committee will assess at least one department approved assessment instrument (WIDA Screener, ACCESS 2.0) on all four domains which will be given no earlier than 30 school days prior to the ELL Committee's determination regarding exiting. The ELL Committee may also use the following criteria:

- Prior educational experiences or academic, social experiences and a student interview

- Written recommendation and observation by current and previous instructional and supportive staff
- Grades from the current and previous years
- Parental input
- Test results from tests other than the English Language Proficiency

If the majority of the ELL Committee determines that the student is English language proficient, the student is exited from the program. The ESOL representative inserts the documentation into the student cumulative folder, updates the student's ELL Plan and gives information to data entry.

Per the META Consent Decree, NCA will monitor students for two years after they have exited the ESOL program.

1. The first review will occur at the first report card after exiting the program.
2. The second review will occur at the second report card after exiting the program.
3. The third review will occur at the end of the first full year after exiting the program.
4. The fourth review will occur at the end of the second full year after exiting the program.

The person responsible for conducting the follow-up performance of former ELLs, updating the student ELL Plan, and the reclassification of students if needed is the ESOL representative. The guidance counselor may assist as needed. After monitoring the most recent report card, classroom performance data, teacher feedback, and standardized test scores, the ESOL representative will schedule an ELL Committee meeting and notify parents if progress is unsatisfactory. The ELL Committee will recommend an appropriate ELL Plan for the students who are reclassified and place it into the student's ESOL folder.

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

Staff Numbers

ELL student enrollment is assumed to be at approximately the same or slightly lower percentage of the student body as in surrounding CCPS schools. Therefore, the preliminary staffing plan for the English Language Learner program is for three Spanish speaking teachers to serve as the ESOL representatives initially, and six teachers to obtain their ELL endorsements. We estimate the need for the following dedicated ESOL staff to serve as ESOL representatives:

Table 7.1 ESOL Staff

School Year	Spanish Teachers	ESOL – Endorsed Teachers
2020 - 2021	4	6
2021 - 2022	4	6
2022 - 2023	4	6
2023 - 2024	4	6
2024 - 2025	3	6

The first year we will expect to find students that will need ESOL staff support. By the end of that year, these students should be well on their way to being self-sufficient in English. The following years will have much fewer first-time students joining the school, thus the need for ESOL endorsed teachers should decrease.

ELL Staff Qualifications

NCA will employ ELL teachers who have an ESOL endorsement. The ESOL representative will manage and monitor student placement and progress, collect and review student evaluation data, create and maintain ELL Plans and provide accommodations. The ESOL representative will also attend all district trainings. All mainstream teachers who have an ELL student in their classroom will receive support from the ESOL representative. Mainstream teachers will also attend required trainings to stay compliant with the law. Human Resources will track certification and professional development status. This includes the necessary courses to become ESOL endorsed.

The ESOL representative will ensure adherence to the META Consent Decree covering:

- Identification and assessment
- Equal access to appropriate programming
- Equal access to appropriate categorical and other programming for ELL personnel
- Monitoring
- Outcome measures

Staff Training

Teachers who need ESOL training are identified upon being hired. The new hire signs a form agreeing that he or she is committed to taking the ESOL requirements within the required time.

Human Resources will develop and use an accountability system to ensure that all new hires attend the orientation training. At the new hire meetings, teachers will be informed of the ESOL training requirements. They must sign a letter indicating that they are committed to taking such training within the required state mandated timeline. In addition to the orientation meeting, the ESOL representative will send quarterly reports to the school principal and teachers involved in the training program. These reports inform personnel as to their status in meeting ESOL training requirements.

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.

NCA will embody a culture of virtue and ethics that emphasizes the importance of excellence and achievement. This culture will endow our students with an understanding of the good, the true, and the beautiful. NCA's culture will be evident from the top down, as students see the board, administration, teachers, and staff living out civility, trustworthiness, respect, and concern for one another and for each student at all times. The academic environment will reinforce clear expectations of self-discipline, responsibility, and high achievement. Students will be stimulated intellectually by a rigorous curriculum, learning from the best that has been thought, written, and spoken throughout history. Surrounding our students with examples of goodness, truth, and beauty from history and literature will enable them to make good judgments in their own lives. Learning to know, to imitate, and to seek excellence will enable our students to become productive, responsible, caring citizens, able to function well in a diverse society. The Individuals with Disabilities Act of 2004 (IDEA) and the 2006 regulations that implement the IDEA govern the discipline of students with disabilities, including Rule 6A-6.03311 and 6A-6.03312. Pursuant to FS 1006.09(1)(b), the principal or the principal's

designee may suspend a student only in accordance with the rules of the school board. Other sections of FS 1006.09 provide additional safeguards for students.

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.

The school does not intend to use the Sponsor's Code of Conduct policy. The NCA Discipline Policy is included as Attachment G.

- The practices the school will use to promote discipline, including both penalties for infractions and incentives for positive behavior are on page: 11, 24, 203-204
- The offenses for which students must (non-discretionary) and may (discretionary) be suspended or recommended to the local school district for expulsion are listed and defined on page: 205-207
- The roles of administrators, teachers, staff, and the governing board regarding the discipline policy are described on page: 204-205
- An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings are provided on page: 205
- The 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 are described on page: 202-203; and
- The process for informing students and parents about their rights and responsibilities under the code of conduct are explained on page: 205

NCA will follow Statute Florida administrative code 6A-6.03312 Discipline Procedures for Students with Disabilities.

The offenses for which students must (non-discretionary) and may (discretionary) be suspended or recommended to the local school district for expulsion will be fully listed and defined in the student code of conduct when it is developed. The list of offenses will be developed in compliance with all applicable federal and Florida statutes and rules. The list will be designed to promote a safe and supportive learning environment and to protect students and staff from conduct posing a serious threat to school safety. In the absence of a tailored student code of conduct passed by the NCA Board, NCA will follow the non-discretionary and discretionary offenses and responses listed in the CCPS Student Code of Conduct.

Infractions of the Code of Student Conduct are grouped into four levels:

- Minor Level I
- Intermediate Level II
- Major Level III
- Zero Tolerance Level IV

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.

NCA will conduct field trips with every class offered at NCA. Parents will opt the students in to attending these field trips, and thus will pay the associated costs. If parents cannot afford a field trip, the school will conduct fundraising activities to help offset those student costs. Students will not be denied access to the field trip based on inability to pay the expense. After-school clubs and sports will be available for students. Examples are listed in attachment FF.1. Each club and sport will be dependent on the availability of faculty sponsors. To fund clubs and sports, school staff, students, and families will seek sponsorships from local businesses and individuals and conduct other fundraising activities.

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.

The school is organized as a not-for-profit corporation in the state of Florida.

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

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.

The Board

The board of directors is the governing body of the school and is responsible for overseeing the effective, faithful execution of the school's mission. The founding board has created the school specifically to implement a traditional, classical-liberal arts educational philosophy according to the following mission statement: *To train the minds and improve the hearts of young people through a content-rich classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.*

The board oversees budgeting and spending, community outreach, charter fidelity, setting policy, compliance with applicable laws and regulations, and development to support the program. More specific responsibilities of the board include but are not limited to:

Advocacy

- Serving as ambassadors for the school by clearly protecting and articulating the school's mission and goals and by garnering support of the community.

School Leader Support

- Providing input and feedback to the school leader on specific issues and concerns (e.g. school culture, discipline policy, student recruitment, etc.). Formally evaluating the principal on an annual basis.
- Supporting the principal by ensuring that he has the moral and professional support he needs to further the goals of the school.

Fiscal Accountability

- Participating in the budgeting process each year, providing advice and feedback to the executive director.
- Formally evaluating the executive director annually.
- Monitoring the management of financial resources by approving the annual budget and ensuring that proper financial controls are in place.

- Financial reporting of the treasurer to the board as required in the bylaws to ensure the board is “hands-on” as it relates to fiscal oversight and responsibility.

Development/Fundraising

- Assuring there are adequate resources for the school to fulfill its mission by raising funds from the local school community as needed.

Compliance

- Monitoring and ensuring compliance with the Florida Department of Education regulatory statutes and other local, state, and federal laws by regularly reviewing school policies, programs, and practices.
- Reviewing school data against charter and charter goals to ensure compliance with the vision, strategies, and objectives identified therein.
- The governing board has the ultimate responsibility for charter compliance. It will utilize the principal and executive director to ensure that all charter requirements are fulfilled.

Other

- Serving as the grievance board for parent and staff concerns that are unable to be resolved by the principal.
- Actively recruiting new governing board members.

In summary, the board is accountable for the academic, financial, legal, and operational performance for the school. The board places responsibility for implementing its policies with the executive director and principal, but the board remains accountable.

Powers, Duties and Responsibilities

The governing board’s powers, duties and responsibilities are:

1. Annually adopt and maintain an operating budget pursuant to FS 1002.33(9)(h).
2. Exercise continuing oversight over charter school operations pursuant to FS 1002.33(9)(i).
3. Ensure that the charter school has retained the services of a certified public accountant or auditor for the annual financial audit, pursuant to s. 1002.345(2) and FS 1002.33(9)(j)1.
4. Review and approve the audit report, including audit findings and recommendations for the financial recovery plan pursuant to FS 1002.33(9)(j)2.
5. Perform the duties in s. 1002.345, including monitoring a corrective action plan pursuant to FS 1002.33(9)(j)3a.
6. If required, monitor a financial recovery plan in order to ensure compliance pursuant to FS 1002.33(9)(j)3b.
7. Participate in the required governance training approved by the department which must include government in the sunshine, conflicts of interest, ethics, and financial responsibility required by FS 1002.33(9)(j)(4) and SBE 6A-6.0784.
8. Report the school’s progress annually to the Sponsor, which shall forward the report to the commissioner of education at the same time as other annual school accountability reports pursuant to FS 1002.33(9)(k).
 - a. Include student achievement performance data, including the information required for the annual school report and the education accountability system governed by ss. 1008.31 and 1008.345. Charter schools are subject to the same accountability requirements as other public schools, including reports of student achievement information that links baseline student data to the school’s performance projections identified in the charter. The charter school shall identify

- reasons for any difference between projected and actual student performance pursuant to FS 1002.33(9)(k)(1).
 - b. Include financial status of the charter school which must include revenues and expenditures at a level of detail that allows for analysis of the charter school's ability to meet financial obligations and timely repayment of debt pursuant to FS 1002.33(9)(k)(2).
 - c. Include that the facilities used by the charter school shall meet the standards as required by the student population pursuant to F.S. Section 1002.33(9)(k)(3).
- 9. Appoint a representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes. The representative must reside in the school district in which the charter school is located and may be a governing board member, a charter school employee, or an individual contracted to represent the governing board pursuant to FS 1002.33(9)(p)2.
- 10. Hold at least two public meetings per school year in the school district where the charter school is located. Each meeting must be noticed, open, and accessible to the public, and attendees must be provided an opportunity to receive information and provide input regarding the charter school's operations. The appointed representative and charter school principal or director, or his or her designee, must be physically present at each meeting. Members of the governing board may attend in person or by means of communications media technology used in accordance with rules adopted by the Administration Commission under s.120.54(5). These meetings will be held pursuant to FS 1002.33(9)(p)3.
- 11. Each charter school governing board shall develop a policy and procedures for notification of the parent of a student who is removed from school, school transportation, or a school-sponsored activity and taken to a receiving facility for an involuntary examination pursuant to s. 394.463 and FS 1002.33(9)(q).
- 12. Determine annually the capacity of the charter school, in conjunction with the Sponsor, in consideration of the factors identified in this subsection pursuant to FS 1002.33(10)(h).
- 13. Adopt policies establishing standards of ethical conduct for instructional personnel and school administrators pursuant to FS 1002.33(12)(g)3.
- 14. Designate at least one administrative person to be responsible for the duties assigned to a district school superintendent, as defined in s. 1012.01(3)(a) and (b) pursuant to FS 1002.33(16)(c)1.
- 15. Perform the duties assigned to a district school board for FS sections:
 - a. 1012.22(1)(c), relating to compensation and salary schedules.
 - b. 1012.33(5), relating to workforce reductions.
 - c. 1012.335, relating to contracts with instructional personnel hired on or after July 1, 2011.
 - d. 1012.34, relating to the substantive requirements for performance evaluations for instructional personnel and school administrators.
- 16. Report the school's student assessment data to each parent of a student at the charter school, the parent of a child on a waiting list for the charter school, the district in which the charter school is located, and the governing board of the charter school pursuant to FS 1002.33(21)(b)2.
- 17. Approve annual instructional personnel contracts pursuant to 1012.335(2)(c)2.

Delegated Roles

The following delegated roles have been established by the board. In some cases, certain staff members will fill multiple roles, especially in the initial years of the charter.

Executive Director

The board will hire the executive director, who will oversee all aspects of school operations and business administration, including overseeing the principal, and the management of finance and budget, non-instructional personnel, operations, risk management, compliance, facility procurement, financing, vendor due diligence, government relations, and public relations. The executive director or his/her designee will keep the governing board aware of changes in statute, regulations and rules applicable to charter schools and any potential financial concerns the school may encounter. The executive director will identify, hire, train, manage, evaluate, discipline and terminate all non-instructional personnel and the school's principal.

The Principal

The executive director hires the principal to manage the day-to-day operation of all academic areas of the school. In that role, the principal represents the school in its relationship with Hillsdale College Barney Charter School Initiative. The principal attends all board meetings, where he/she presents the school status and any recommendations on academic and instructional issues being considered by the board. The principal will be responsible for the discipline of students, and the planning, operation and supervision of the academic program of the school. The principal will identify, hire, train, manage, evaluate, discipline and terminate manage and evaluate the school's instructional staff, including the guidance counselor, dean of students, Student Services Director, teachers and other instructional staff.

School Operations Manager

The school operations manager will assist the executive director in managing the non-instructional operations, including facility operations and maintenance, vendor oversight, compliance functions, implementation of statutory changes, assistance with grant procurement and grant management, as well as establishing and monitoring the annual school budget. The school operations manager will attend all governing board regular meetings to report on the operations and financial status of the school and present budget adjustment requests. The school operations manager will work cooperatively with the school's principal to keep the governing board well informed about the school's financial stability. Personnel under the supervision of the school operations manager include the project coordinator, registrar (see job description), facility manager (see job description), day porter, receptionist, and school resource officer (see job description).

Director of Operations

The director of operations will assist the school operations manager in managing the overall operations of the school by leveraging knowledge gained across all Optima supported schools.

Business Manager

The business manager will assist the school operations manager, under the supervision of the executive director, in maintaining an annual school budget. The business manager will cooperate with the school's school operations manager to keep the governing board informed about the school's finances. The business manager will be responsible for maintaining the financial books, payroll, purchasing and accounts payable and for contractually required financial reporting.

Facility Manager

The school operations manager will hire the facility manager, who will assist the school operations manager in managing the facility. This includes cleaning, security, parking, lunch program, repairs and maintenance, fire safety, food and asbestos inspections, and emergency drills.

Registrar

The school operations manager will hire the registrar, who will assist the school operations manager in managing student enrollment and registration. This includes the application for enrollment, lottery, and student registration process. It also includes student replacement during the year and summer months due to attrition. The registrar will be responsible for proper maintenance of all student records as required by law.

Curriculum Coordinator

The principal will hire the curriculum coordinator (see job description), who will assist the principal in ensuring the curriculum recommended by BCSI is aligned with the Florida Standards. The curriculum coordinator will also assist with managing the training of teachers on the instructional materials and programs, and selecting the textbooks.

Audit Committee

The board of directors shall appoint an Audit Committee that will be chaired by the board treasurer. The Audit Committee will assist the whole board with financial management oversight but will not participate in the financial management. The Audit Committee shall recommend to the board the selection of the independent auditing firm and will perform such other duties as identified by the board. At least one member shall be designated as the "financial expert," as defined by applicable legislation and regulation. The principal and school operations manager (see job description) shall serve as non-voting members of the Audit Committee. The Audit Committee shall:

1. Annually Monitor: Financial statements
2. Develop a request for proposal for annual financial audit services
3. Recommend the priority of audit bids and the selection of the financial auditor
4. Meet with the required annual auditors as required
5. Respond to external financial auditor's requests to the board
6. Report on the status of the most recent audit results
7. Provide advice on recommended policy changes needed to address audit results

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

The governing board will meet no less than quarterly. The board will comply with the open meeting and record laws by conducting the meetings at a public location. The agendas and minutes will be posted on the school website. The meeting notice will be posted seven days in advance of the meeting. The board will undergo training on the Sunshine laws and requirements of open records and open meetings. Members of the public shall be given a reasonable opportunity to be heard on a proposition before the NCA board.

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 governing board will be at least five members and no more than nine members, according to the school's bylaws. The desired size of the governing board is seven members. The key skills and areas of expertise are management, finance, education policy, non-profit governance, and classical education. NCA's founding board members represent a range of skills, experience and expertise that will benefit the school's startup efforts and successful ongoing operations:

Table 10.1 Current and Desired Board

<p>Matt Mathias, Chairman</p> <ul style="list-style-type: none"> • Board organization, governance and leadership • The face of the founding effort to the community • Finance professional and expert
<p>Timothy Hall, Vice Chairman</p> <ul style="list-style-type: none"> • Senior Finance and Banking Executive • Founding Director, Former President/CEO of private school for students with learning differences • Corporate and non-profit board experience
<p>William Truog, Treasurer</p> <ul style="list-style-type: none"> • Former longtime corporate Chief Executive Officer • Experience with higher education institutions • Hillsdale Alumnus
<p>Dr. Holly Miller, Secretary</p> <ul style="list-style-type: none"> • Management and regulatory compliance experience • Non-profit board governance experience
<p>Dr. Mark Russo, Director</p> <ul style="list-style-type: none"> • Business owner • Board governance experience
<p>Derrick Ayers, CPA, Director</p> <ul style="list-style-type: none"> • Experienced finance executive • Non-profit board governance experience

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

The founding governing board members were strategically selected by the Chair to ensure a diversity of expertise and experience for the benefit of the school's startup efforts and ongoing oversight. Members of the board are respected community leaders, experts in their fields, with a passion for children and quality education. Each agreed to join the Naples Classical Academy board and attend Hillsdale College's governing board training within one year.

The corporate bylaws outline the following under Article III. Directors: Section 4. Term. Board members shall be elected for three-year terms, except as otherwise provided for the initial board members. Beginning in the first fiscal year the corporation operates as a charter school, the initial board members shall establish classes of board members ("Board Classes") by resolution to provide for board terms to be staggered so that no more than approximately 1/3 of the board shall be up for

election in any year, unless a vacancy or vacancies need to be filled. The starting date and length of the terms of the initial board members shall be as set forth in the board classes resolution. Newly elected directors shall assume office, and terms of directors that are expiring shall expire, as of the date immediately following the date of the annual meeting of the board of directors or at any other time as designated by the board. Board membership shall be limited to three consecutive three-year terms. Previous board members shall be re-eligible for membership after a lapse of one year. The three consecutive term limits may be extended by one three-year term by a vote of the board. An initial appointment as a director to serve the remainder of an unexpired term shall not count toward the three consecutive term limits.

The bylaws further state, in Article V. Officers: Section 2. Election.

The officers shall be elected from among the board of directors at each annual meeting of the board members and shall serve for one year and until their successors are elected and qualified. New offices may be created and filled at any meeting of the full board.

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

By selecting board members that have a broad range of backgrounds and experience, NCA will have a solid knowledge base across many disciplines on the board. Having at least five directors ensures that a diversity of skills and ideas are brought to bear on guiding the school. Having up to nine board members increases that diversity. The board will seek to fill knowledge gaps with additional board members, and allowing for up to nine members permits acceptance of multiple candidates from the same area of expertise, if the board believes their service will benefit the school.

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

Table 10.2 Board Members

Name	Current or Prospective	Role	Submissions
Matthew Mathias 2025 Merlin Ct., Naples, FL 34105	Current	Chair	<u> x </u> Information Sheet <u> x </u> Resume
Timothy Hall 2376 Terra Verde Lane Naples, FL 34105	Current	Vice Chair	<u> x </u> Information Sheet <u> x </u> Resume
William Truog 3330 Glen Cairra Dr #201 Bonita Springs, FL 34134	Current	Treasurer	<u> x </u> Information Sheet <u> x </u> Resume
Dr. Holly Raass Miller 1660 Medical Blvd, Suites 100 & 300 Naples, FL 34110	Current	Secretary	<u> x </u> Information Sheet <u> x </u> Resume
Dr. Mark Russo 878 109th Ave N Naples, FL 34108	Current	Director	<u> x </u> Information Sheet <u> x </u> Resume

Derrick Ayers, CPA, CGMA 7649 Ponte Verde Way Naples, FL 34109	Current	Director	<u>x</u> Information Sheet <u>x</u> Resume
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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.

Board Member Recruitment

Board nominees will be subject to an application process including the submission of a resume or curriculum vitae, statement of interest, explanation of qualifications, and affirmation of the school's mission for the board's review and consideration. The applicant will agree to follow all board policies and to submit to fingerprinting and a background check. The Board may recruit members based on the identification of strategic needs of the board and organization and solicit nominees who are natural matches.

Board Member Orientation Process

Upon the election or appointment of new board members, the compliance manager shall provide the new board member with copies of important documents such as: Florida school laws relating to charter schools, state Board of Education rules relating to charter schools, articles of incorporation, bylaws, policies and procedures, current charter contract, current annual budget, and other documents the compliance manager deems essential to an understanding of the operation of the organization.

The compliance manager shall set aside such time as is necessary to answer any questions arising from the study of these documentations and shall cooperate fully in assisting the new member to become an informed and active board member. New board members shall be required to complete statutorily required training. The organization shall provide the new board member opportunities to attend a charter school conference or other training opportunities in regards to the responsibilities of charter school board members.

Board Member Professional Development

The organization shall provide board members with opportunities to attend a charter school conference or other training opportunities in regards to the responsibilities of charter school board members, including the board member training provided by Hillsdale College Barney Charter School Initiative, and they will be advised to watch the BCSI board member training videos available online. NCA's current board members will attend board member training provided by BCSI in Michigan in November 2019. Once every three years, ongoing board member training will be provided as required by Rule 6A-6.0784.

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

The school will comply with the requirements of section 1002.33(26), F.S. [which incorporates the requirements of sections 112.313(2), (3), (7) and (12), and 112.3143(3)]. Our conflict of Interest Policy is included in Attachment K.

Definitions

Interested Person: Any director, officer, owner, president, chairperson, governing board member, or member of a committee with governing board delegated powers and any superintendent, principal, other administrator, or any other person employed by the organization who has equivalent decision-making authority who has a direct or indirect financial interest, as defined below, is an interested person.

Financial Interest: A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- An ownership or investment interest in any entity with which the organization has a transaction or arrangement;
- A compensation arrangement with the organization or with any entity or individual with which the organization has a transaction or arrangement, or
- 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.

Family: A “family” member 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.

Compensation: Compensation includes direct and indirect remuneration as well as loans, gifts, in-kind services, favors or anything of value. A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

Procedures

Duty to Disclose: In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement. Pursuant to FS 112.313 (7), an interested person must disclose any employment or contractual relationship with any organization that the school may initiate a business relationship. The board will not be able to enter into such a relationship without the interested person resigning from the board.

Determining Whether a Conflict of Interest Exists: After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she may elect to leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

Abstaining from Voting

Pursuant to FS 112.3143 (3), no board member shall vote in an official capacity upon any measure which would inure to his or her (or a family member) special private gain or loss. In such cases the member may abstain, but shall file a memorandum pursuant to requirements of Section 112.3143, Florida Statutes.

Procedures for Addressing the Conflict of Interest

- An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she may elect to leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
- The chairperson of the governing board or committee may, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- After exercising due diligence, the governing board or committee shall determine whether the organization can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the organization's best interest, for its own benefit, and whether it is fair and reasonable.
- In conformity with the above determination, the organization shall make its decision as to whether to enter into the transaction or arrangement, except if the interested person or his/her spouse or child (i.e., immediate family) has a direct material interest in a transaction involving the purchase, rent or leasing of any realty, goods or services, the organization is prohibited from entering into such transaction without subjecting the decision to competitive bidding.

Violations of the Conflicts of Interest Policy

- If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action. (See also Attachment K – Governing Board Code of Ethics and Conflict of Interest Policy).

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. - There are no school advisory bodies or councils in place or planned.

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.

A parents or student's objection to a governing board policy or decision, administrative procedure, or practice at the school will be handled with the following process. The Family Handbook will contain the following general steps for parents or students to initiate an objection.

1. The teacher will be the first point of contact. The classroom teacher would be responsible to take the lead in problem resolution. If necessary, the classroom teacher will involve others as necessary.
2. If the teacher cannot solve the objection to the parent or student's satisfaction, the teacher will inform the parent or student to contact the principal.
3. The principal will attempt to resolve the objection if possible. If the objection is still not resolved, the principal will inform the parent or student to contact the governing board.
4. The recommended procedure to contact the governing board will be to write an email to the entire governing board specifying the details of the objection and the parent or student's experience with the teacher and principal.
5. The governing board will take up the objection at the next board meeting. The results could range to an update to a policy, direction to change a procedure, additional training for the principal or staff member or a decision of "no action necessary".

Complaints about the principal or executive director may be brought to the board directly following the specified protocol in step 5 above. Any complaint about school personnel will be investigated by the administration before consideration and action by the board of directors. Complaints that do not follow the proper sequence will be redirected accordingly.

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.

Naples Classical Academy is filing this application in partnership with The Optima Foundation, Inc. NCA is also pursuing an affiliation with the Hillsdale College Barney Charter School Initiative.

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

Mrs. Erika B. Donalds, CPA, CGMA
The Optima Foundation
15275 Collier Boulevard, #201-299,
Naples, FL 34119
Phone: (239) 449-8599
Email: Erika@OptimaEd.org

Mr. Eric Coykendall, Associate Director
Hillsdale College
Barney Charter School Initiative
33 E. College Street, Hillsdale, MI 49242
Phone: (517) 607-2713
Email: coykendall@hillsdale.edu

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

Nature and Purpose of Partnership

The Optima Foundation is a non-profit organization founded to support the establishment and expansion of superior quality schools of choice. Optima's team includes finance, compliance, and operations professionals with experience in the field of public education. Optima serves charter school founding boards by providing project management, application preparation support, market analysis, and staff recruitment and training. Services also include facility planning, financing and buildout management, preparation of policies and procedures, contract and regulatory compliance, government

relations, marketing and community outreach, and student recruitment. Optima's ongoing services include academic, financial, and operational management and oversight.

Hillsdale College desires, through its Barney Charter School Initiative (BCSI), to assist the launch of K-12 charter schools which are based on a classical liberal arts model and which have a strong civics component which will equip students to understand and defend the principles of the American founding. Through this initiative, Hillsdale College can express its philosophy of education in a K-12 school setting. Charter Schools assisted by Hillsdale College will be charter schools that adhere to, and are consistent with, the following key characteristics and components:

1. The centrality of the Western tradition in the study of history, literature, and philosophy;
2. A rich and recurring examination of the American literary, moral, philosophical, political, and historical traditions;
3. The use of explicit phonics instruction for the teaching of reading;
4. The teaching of Latin;
5. The acknowledgement of objective standards of correctness, logic, beauty, weightiness, and truth intrinsic to the liberal arts;
6. A school culture demanding moral virtue, decorum, respect, discipline, and studiousness among the students and faculty;
7. A curriculum that is content-rich;
8. A faculty where well-educated and articulate teachers explicitly convey real knowledge to students using traditional teaching methods rather than using so-called "student-centered learning" methods;
9. A school that uses technology effectively but without diminishing the faculty leadership that is crucial to academic achievement; and
10. A school with a plan to serve grades K through 12, although the grades at school opening may be scaled back if reasonable.

BCSI offers support to start-up charter schools, consulting and training for charter school boards, training for heads of schools, administrators, and teachers, and feedback on best practices gained from its network of affiliated classical charter schools across the country. BCSI specifies the curriculum and materials to be adopted by the school and plays a primary role in the principal selection process.

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

The Optima Foundation is hired by and reports to the school's governing board. Optima does not have a governance role, but provides administrative support to the governing board.

The Hillsdale College Barney Charter School Initiative's involvement in the governance of the school will be limited to counseling the governing board and principal on issues related to NCA's contract with BCSI. Hillsdale College and/or BCSI have no financial interest in the school, nor do they provide direct monetary support. In addition, NCA will not pay any fees for BCSI services.

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. - See 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?

Process for Hiring the School Leader

The Optima Foundation will hire a search firm to help identify candidates for the position of principal. Once candidates are identified and their credentials vetted by the search firm, a designee of the NCA Board will conduct a one-on-one interview with candidates who qualify for the principal position. The Chair will also conduct interviews before candidates are presented to the entire board in a public meeting.

BCSI will support and advise the NCA Board and Optima in recruiting and selecting a principal. BCSI's search began when the decision to apply for a charter was made. BCSI has assisted several other classical schools in the selection of their principals through a national search. Candidates identified by BCSI will also be vetted by NCA's search firm, and candidates who advance through NCA's process will also be interviewed by BCSI leadership.

Final selection of a candidate will be made by Optima. Once hired, the principal will then hire the dean of students and the instructional faculty.

Criteria to be Used in Selecting the School Leader

The selection of the principal will include finding someone with a passion for classical education. The principal will also need to be someone that can motivate school staff to attain a high level of performance from themselves and their students. Preferred candidates will have a master's degree, teaching experience at the K-12 or college level, a record of leadership, and demonstrated abilities in speaking and writing. Candidates will be classified in tiers according to their school leadership experience as follows:

- Tier 1: Extensive classical education experience, inaugural public charter school experience
- Tier 2: Extensive classical education experience, public charter school experience
- Tier 3: Extensive classical education experience, private school experience
- Tier 4: Some classical education experience, public charter school experience

Principal Hiring Timeline

The timeline to hire the principal is in the table below:

Table 11.1 Principal Hiring Timeline

Date	Action
October 1, 2019	Initiate Search
November 30, 2019 (estimate)	Charter Signed
November 1, 2019 – December 30, 2019	Interview Applicants
January 1, 2020	Complete Employment Contract

Key Skills and Competencies for the School Leader

The principal must have the following skills and competencies:

1. Knowledge of classical education methodologies
2. Capable of projecting this knowledge to the faculty
3. Knowledge of charter school operations
4. Understanding of charter school startup needs and challenges

Qualities the School Leader Must Have for NCA to be Successful

The principal must have the following qualities:

1. Committed to classical education
2. Background of positive relationships with staff
3. Effective instructional coach

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.

Under NCA's management structure, the executive director reports to the Board. The principal reports to the executive director and is responsible for all academic responsibilities. The executive director is responsible for providing and managing all infrastructure required by the school to operate.

The principal role is responsible for:

- Curriculum development
- Student discipline
- Parent relations
- Exceptional student education

The executive director role is responsible for:

- Financial management
- Human resources
- Student enrollment
- Lunch program

- Guidance counselor
- Course scheduling
- After-school clubs
- Liaison with Hillsdale College Barney Charter School Initiative
- Instructional personnel selection and supervision
- Transportation program
- Federal, state, and legal compliance issues
- Receptionist
- Data entry
- Health clinic
- Information technology
- School security
- Facility management

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.

Staffing Plan

The assumptions used in NCA's staffing plan are aligned with the objectives of the school, anticipated school operating funds, and expected school enrollment. Staff levels take into account class size limits established by state and/or federal laws. Staffing requirements will grow concomitantly with enrollment growth. Lower levels of staff responsibility will be performed by their supervisor until such time that the work load cannot be performed by one person. Thus, the school operations manager responsibilities will include performing the facility management function until such time that a full-time facility manager (see job description) is necessary.

Table 11.2 Staffing Plan

Staff	Start Date	Plan Year	Year 1	Year 2	Year 3	Year 4	Year 5
Total Number of Students		0	786	897	983	1049	1107

Optima Operations

Executive Director	6/1/2019	0.5	1	1	1	1	1
Director of Operations	6/1/2019	0.5	1	1	1	1	1
Compliance Manager	6/1/2019	0.5	1	1	1	1	1
Business Manager	6/1/2019	0.5	1	1	1	1	1
Startup Consultant	6/1/2019	0.5	0.25				
Total Optima		2.5	4.25	4	4	4	4

Operations Administrative Staff

School Operations Manager	2/1/2020	0.50	1	1	1	1	1
Facility Manager	7/1/2020		1	1	1	1	1
Event Coordinator	7/1/2020		1	1	1	1	1
Nutrition Services Coordinator	7/1/2020		1	1	1	1	1
Registrar	2/1/2020	0.50	1	1	1	1	1
Day Porter	7/1/2020		1	1	1	1	1
Receptionist	8/1/2020		1	1	1	1	1

Staff	Start Date	Plan Year	Year 1	Year 2	Year 3	Year 4	Year 5
Security Resource Officer	8/1/2020		1	1	1	1	1

Operations Administrative 1 8 8 8 8 8

Academic Administrative Staff

Principal	1/1/2020	1	1	1	1	1	1
Administrative Assistant	7/1/2020		1	1	1	1	1
Dean of Students	7/1/2020		1	1	1	1	1
Curriculum Coordinator	7/1/2020		1	1	1	1	1
Student Services Director	7/1/2020		1	1	1	1	1
Guidance Counselor	7/1/2020		1	1	1	1	1
College Advisor						1	1
Upper School Dean						1	1

Academic Administrative Staff 1 6 6 6 8 8

Instructional Staff

Kindergarten Classroom Teacher	7/1/2020		6	5	4	4	4
1st Grade Classroom Teacher	7/1/2020		5	6	5	4	4
2nd Grade Classroom Teacher	7/1/2020		5	6	6	5	4
3rd Grade Classroom Teacher	7/1/2020		5	6	6	6	5
4th Grade Classroom Teacher	7/1/2020		5	5	5	5	5
5th Grade Classroom Teacher	7/1/2020		5	5	5	5	5
6th Grade Classroom Teacher	7/1/2020		5	5	5	5	5
Physical Education Teacher	7/1/2020		2	2	2	2	2
ESE Teacher	7/1/2020		2	2	2	2	2
Elementary Latin Teacher	7/1/2020		1	1	1	1	1
Elementary Spanish Teacher	7/1/2020		4	4	4	4	3
Elementary Art Teacher	7/1/2020		3	3	3	2	2
Elementary Music Teacher	7/1/2020		3	3	3	2	2
History Classroom Teacher				1	2	3	4
Literature Classroom Teacher				2	4	6	7
Math Classroom Teacher				1	2	3	4
Upper Art Teacher				1	1	1	1
Upper Music Teacher				1	1	1	1
Upper School Latin Teacher				1	2	2	2
Science Classroom Teacher				1	2	2	2
Biology Classroom Teacher						1	1
Chemistry Classroom Teacher							1
Physics Classroom Teacher							
Upper School Spanish Teacher						1	1

Staff	Start Date	Plan Year	Year 1	Year 2	Year 3	Year 4	Year 5
Instructional Staff			51	61	65	67	68
Physical Education Assistant	8/1/2020		6	7	6	6	6
Recess Monitor	8/1/2020		2	2	2	2	2
Instructional Assistant	8/1/2020		6	7	6	6	6
Instructional Support Staff		0	14	16	14	14	14
Total Staffing		5	83	95	97	101	102

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.

Staff Recruitment, Selection and Development Plan

The school will require all teachers to meet or exceed the expectations for certification as required by Chapter 1012 and Florida Statutes. The school will comply with all teacher/paraprofessional certification requirements of the Federal Every Student Succeeds Act or subsequent superseding applicable law. Parents will be informed of the qualifications of teachers as required by Florida Statutes and federal legislation. The school will comply with the anti-discrimination provisions of Florida Statutes or the Florida Education Equity Act.

Background checks and fingerprinting will be conducted on all staff in accordance with Florida statutory employment requirements. Average teacher salary of \$44,522 is used for the first year of the plan. Instructional personnel may receive pay increases annually. Average benefit contributions for all salaried employees are expected to amount to approximately 30 percent of salary. Teacher qualifications will be transparent for parents and members of the community.

Staff Recruitment

NCA expects to work in coordination with ESI, a national recruiting and staffing agency, to manage the staff recruitment and retention life-cycle at Naples Classical Academy. ESI is a Florida-based firm that will support NCA by implementing their standard education staffing process, which is broken down into two separate but inter-related phases: sourcing and screening.

1. Sourcing – Finding the best talent, means leaving no stone unturned. By participating in industry conferences, seminars, and career fairs. ESI coordinates with dozens of colleges to attract quality educators. Another major avenue for candidate sourcing is technology platforms. Posting on national job boards (Indeed, ZipRecruiter, etc.) invites interested candidates to directly apply for positions, while resume boards (LinkedIn, Monster, etc.) allow for ESI recruiters to contact qualified candidates who have posted their resumes or work profiles. Candidates that meet the qualifications of personnel as defined by F.S. 1012.32, and meet the selection criteria of NCA, will be submitted by ESI to the appropriate hiring manager at NCA.
2. Screening – Upon completion of the interview phase, all selected candidates will go

through the ESI Screening Process which includes all background screening as required under F.S. 1012.465 or 1012.56 (whichever is applicable). Prior to the first day of any employment, engagement of service, or appointment, all components of the compliance checklist will be sent to the NCA business manager or compliance manager (see job description) for review, verification, and transmission to the School District as required. Once an individual has cleared the required initial background screening as stated above, a system operated by ESI, in coordination with the NCA business manager or compliance manager, will monitor all aspects of periodic background screening and training in accordance with F.S. 1012.32 and 1012.465 or 1012.56 (whichever is applicable).

Staff Selection

The principal will be responsible for the selection of instructional staff members. There are two minimum requirements to be considered for employment as teachers at the school:

1. State of Florida certification or eligibility for same
2. Possession of high moral character evidenced during the interview, through references and background check process

Teaching staff are expected to attain highly qualified status during their first year. NCA will attract and retain outstanding staff by providing competitive salaries and benefits comparable to those provided by surrounding school districts, as well as offering a collegial, rewarding, and intellectually and professionally stimulating environment which encourages and develops continual improvement and professional development, and fosters a culture of excellence in thought and behavior. Staff members will also have an opportunity to be integral in the planning and operation of the school, under the direction of the principal, especially in the early years of operation.

Instructional staff and paraprofessionals will adhere to the requirements of Florida Statutes and will be certified in the field in which they will be teaching. Instructional staff whose certifications are held in other states will have their teaching credentials evaluated by the Florida Department of Education to determine eligibility for a Florida certificate.

Staff Professional Development

The principal will be responsible for staff professional development that are described in Section 13.A. The principal will plan for and organize the training plan to ensure each component of the curriculum is covered. Teacher and administrator feedback will determine which areas require further training and support. Professional development in scaffolding, differentiated instruction, cognitive approaches to learning, and strategies to enhance memory will be targeted to each program as teachers become comfortable with the above components of the education program. Initial training will take place beginning in July to ensure teachers are prepared for the start of school in August.

As teachers become highly skilled in the core components of the school's curriculum, accommodations will be made to allow for a more tailored and personalized professional development selection. This will also serve as a recruitment tool as teachers will have a budget to select professional development within a range of acceptable topics.

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.**

The school's relationship with its employees will be a private employer on an at-will basis. The employees will not be enrolled in the Florida Retirement System under F.S. 121.021(34), nor subject to collective bargaining. The school will offer annual contracts for employment compliant with Florida Statutes regarding teacher contracts. The contract's nature and purpose will be to specify salary, position, title, and job duties, and will be signed by the employee and by an employee witness. The principal will sign all contracts for personnel that report to him/her. The school operations manager will sign all contracts for personnel that report to him/her.

- 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.**

The school plans to use the Florida Consortium of Public Charter Schools' Evaluation System for administrators and instructional personnel. This system is already approved by the state of Florida as compliant with FS 1012.34. The principal will perform the evaluation of the instructional and administration staff reporting to him/her using this evaluation system. The school operations manager will perform the evaluation of the administration staff reporting to him/her using this evaluation system. All staff will be evaluated at least once a year. A classroom teacher, as defined in s. 1012.01(2)(a) (excluding substitute teachers) who is newly hired by the NCA school board must be observed and evaluated at least twice in the first year of teaching in the school. The results of the evaluation will inform the principal or school operations manager on the performance evaluation results used for salary increases and the training and/or mentoring that should be planned for the staff. The evaluator must submit the written report to the employee no later than 10 days after the evaluation takes place. The evaluator must discuss the written evaluation report with the employee. The employee shall have the right to initiate a written response to the evaluation, and the response shall become a permanent attachment to his or her personnel file.

- 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?**

Compensation Structure

The staff will receive the following compensation:

- | | |
|-------------------------------|------------------------------------|
| 1. Basic Salary | 5. Dental Insurance |
| 2. Supplements, as applicable | 6. Basic Life Insurance |
| 3. Health Insurance | 7. Short-Term Disability Insurance |
| 4. Health Savings Accounts | 8. Vision Care |

9. Retirement Savings Accounts

Compensation and benefits are one factor in our staff retention plan. Minimizing administrative impacts of mandates from state statutes is a second factor in instructional staff retention. Typical salary ranges are provided in the table below for the five staff levels. The actual starting salary will be dependent on the experience level of each applicant (as determined by the principal for the staff reporting to him/her and the school operations manager for the staff reporting to him/her). During subsequent years of employment, staff salary increases will be affected by their performance rating as Highly Effective, Effective, Needs improvement or Unsatisfactory per FS 1012.34. This performance rating will also factor in student performance on state tests.

Table 12.1 Salary Ranges

Position	Experience/Education Level				
	1	2	3	4	5
Administrative Assistant	\$30,000	\$35,000	\$40,000	\$45,000	\$50,000
Dean of Students	\$60,000	\$65,000	\$70,000	\$75,000	\$80,000
Business Manager	\$45,000	\$50,000	\$55,000	\$60,000	\$65,000
College Advisor	\$35,000	\$40,000	\$45,000	\$50,000	\$55,000
Compliance Manager	\$45,000	\$50,000	\$55,000	\$60,000	\$65,000
Curriculum Coordinator	\$30,000	\$35,000	\$40,000	\$45,000	\$50,000
Day Porter	\$22,880	\$24,000	\$25,120	\$26,240	\$27,360
Enrollment Manager	\$30,000	\$35,000	\$40,000	\$45,000	\$50,000
Student Services Director	\$35,000	\$45,000	\$55,000	\$60,000	\$65,000
Facility Manager	\$35,000	\$40,000	\$45,000	\$50,000	\$55,000
Guidance Counselor	\$38,800	\$40,000	\$42,500	\$44,000	\$47,000
Instructional Assistant	\$24,000	\$26,000	\$28,000	\$30,000	\$32,000
Principal	\$75,000	\$80,000	\$85,000	\$90,000	\$95,000
Project Coordinator	\$25,000	\$30,000	\$35,000	\$40,000	\$45,000
Receptionist	\$24,000	\$26,000	\$28,000	\$30,000	\$32,000
Recess Monitor	\$9,000	\$10,000	\$11,000	\$12,000	\$13,000
Registrar	\$30,000	\$35,000	\$40,000	\$45,000	\$50,000
School Operations Manager	\$55,000	\$60,000	\$65,000	\$70,000	\$75,000
Security Guard	\$26,000	\$28,000	\$40,500	\$42,000	\$45,000
Teacher	\$42,810	\$44,810	\$46,810	\$48,810	\$50,810
Upper School Dean	\$55,000	\$60,000	\$65,000	\$70,000	\$75,000

Employment Benefits

The following benefits will be included in compensation:

- Holidays, up to 12 days are available.
- Medical Insurance for the employee.

- Dental Insurance for the employee.
- Short Term Disability Insurance for the employee.
- Life Insurance for the employee.
- PTO: Salaried staff contracted to work 10 months will earn paid time off at the rate of 3 hours per 2-week pay period. Salaried staff contracted to work 12 months will earn paid time off at the rate of 4 hours per 2-week pay period. Employees are eligible for unpaid FMLA leave if they:
 1. have a cumulative (not necessarily continuous) 12 months of prior service;
 2. have worked at least 1,250 hours during the 12 months immediately preceding the date on which the FMLA leave would commence; and,
 3. work at a location where at least 50 employees are within a 75-mile radius.

Incentives and Reward Structures

Supplements for advanced degrees and the following are included pursuant to FS 1012.22:

1. Assignment to a Title I eligible school.
2. Assignment to a school that earned a grade of “F” or three consecutive grades of “D” pursuant to s. 1008.34 such that the supplement remains in force for at least one year following improved performance in that school.
3. Certification and teaching in critical teacher shortage areas. Statewide critical teacher shortage areas shall be identified by the State Board of Education under s. 1012.07. However, the district school board may identify other areas of critical shortage within the school district for purposes of this subparagraph and may remove areas identified by the state board which do not apply within the school district.
4. Assignment of additional academic responsibilities.

Compensation and other Components Factor into the Staff Retention Plan

Compensation factors into our retention plan as the most important component. These factors are prioritized as follows:

1. Financial compensation: wages/supplements
2. Benefits: Paid time off, Holidays off, Health Insurance, Health Savings Accounts, Dental Insurance, Basic Life Insurance, Short-Term Disability Insurance, Vision Care, Retirement Savings Accounts
3. Work design: appropriate workload, task variety, autonomy and feedback
4. Job status within the school and recognition for a job well done
5. Importance or value of the work assigned
6. Future opportunities: advancement and development

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

Hiring Procedures

FS 1012.33, FS 1002.33, 1012.335 and FS 440.102 teachers hired by the school will meet the following minimum criteria:

1. FS 1012.33:
 - a. Be of good moral character.
 - b. Must have attained the age of 18 years.
 - c. Must not be ineligible for such employment under s. 1012.315.

- d. Must hold a certificate or license issued under rules of the State Board of Education or the Department of Children and Families.
 - e. The applicant must undergo background screening as required under s. 1012.56.
- 2. FS 1002.33:
 - a. The applicant must pass employment history check of each of the applicant's previous employers. Character references will be checked at this time.
 - b. The applicant must pass the screening through use of the educator screening tools described in s. 1001.10(5).
 - i. The Professional Practices' Database of Disciplinary Actions Against Educators
 - ii. The Department of Education's Teacher Certification Database
 - c. The applicant has not resigned from a school district in lieu of disciplinary action with respect to child welfare or safety, or has not been dismissed for just cause by any school district with respect to child welfare or safety.
 - d. The applicant's certification or licensure as an educator has not been suspended or revoked by any state.
- 3. FS 1012.335:
 - a. The applicant has not received two consecutive annual performance evaluation ratings of unsatisfactory, two annual performance evaluation ratings of unsatisfactory within a 3-year period, or three consecutive annual performance evaluation ratings of needs improvement or a combination of needs improvement and unsatisfactory under s. 1012.34.
- 4. FS 440.102: The applicant must pass a drug screening processed by the school.

The school's hiring procedures include the following:

- 1. Generate a pool of qualified applicants using a search firm, job boards, mailings, notices/ads in professional and general publications, and informal networking.
 - a. Advertise in accordance with Equal Employment Opportunity Commission (EEOC) mandates/guidelines.
 - b. Post job vacancies and descriptions on the school website.
 - c. Contact department heads of nearby universities, including Florida Gulf Coast University, Ave Maria University and Florida SouthWestern State College.
- 2. When an applicant is selected for further consideration, an initial telephone interview will be conducted.
- 3. If the applicant is selected for further consideration based on the telephone interview, the applicant will be invited to the school for a more extensive in-person interview.
- 4. A tentative job offer may be made contingent on passing a background check and drug test.
- 5. Candidate completes a drug test.
- 6. The school shall verify employment history, character references, and transcripts.
- 7. The candidate must:
 - a. Complete a Level 2 background check with the school district to ensure he or she is eligible for employment under § 1012.315, F.S. This includes:
 - i. Completing an oath form providing information on any criminal history and undergoing a FDLE background check.
 - ii. Completing an FBI fingerprint record check.

8. Once the candidate passes the drug test and Level 2 background check, he or she will then be verified for education licensure and certification confirmation.
9. Annual contracts being offered to instructional personnel will be approved by the NCA Board of Directors.

Separation/Termination Procedures

The school's employee involuntary termination procedures include the following:

1. The principal or school operations manager will initiate all involuntary termination procedures.
2. The principal or school operations manager will notify ESI of the intent to terminate the employee. At this point, ESI will verify that the termination complies with applicable employment law.
3. ESI will create or review the notice of termination.
4. The principal or school operations manager will be responsible for completing a Personnel Action Form and forward the form, along with the notice of termination to ESI. Reasons for an involuntary separation will be stated on the Personnel Action Form.
5. In the case of a voluntary resignation, an employee will submit a letter of resignation providing at least two weeks' notice.
6. For either voluntary or involuntary separations, the following steps will occur:
 - a. An exit interview and close-out meeting will be scheduled by ESI with the terminated employee.
 - b. The principal or school operations manager will request that the employee contact ESI to arrange for an exit interview.
 - c. The principal or school operations manager will ensure that all school property in the possession of the employee is returned, including but not limited to the following:
 - i. Student work in the possession of the employee
 - ii. School keys and security badges
 - iii. Computer
 - iv. Lesson plan binder
 - v. Instructional materials, including but not limited to textbooks, workbooks, tests, assessments, and curriculum materials
 - d. The following items will be reviewed with the employee during the exit interview:
 - i. Final pay calculation
 - ii. Benefits termination and COBRA/state continuation insurance rights, if applicable
 - iii. Status of other payroll deductions, if applicable
 - iv. Exit Interview Form
 - v. Address to which correspondence is to be sent (e.g. W-2 form)
 - e. ESI will send copy of the exit interview form to the principal or school operations manager as appropriate.
7. ESI shall terminate benefits:
 - a. Terminate in payroll
 - b. Terminate employee benefits: medical, dental, vision, disability, and retirement
 - c. Signed release for benefits termination
 - d. Add personnel file to terminated file cabinet

8. ESI notifies the Technology Department of the terminated employee and requests that all technology access be terminated.

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.

See Attachment R for Personnel Policies.

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

Unsatisfactory Staff Performance

Ongoing observation and continuous feedback are essential to maximizing employee performance at all levels. The governing board will oversee the executive director's performance and provide feedback on a continuous basis. If performance is less than acceptable, after interim interventions, the governing board will notify the applicable leader during the annual performance review. If the performance does not improve, the leader risks termination. The board may hire a mentoring consultant for short durations to help the executive director improve their performance as needed.

The principal and school operations manager will oversee and monitor staff performance and provide feedback on a continual basis so both leadership and employee are aware of strengths and areas needing improvement, and can work to correct deficiencies promptly and proactively. They will notify staff of their performance on an ongoing basis and during their annual performance reviews. If unsatisfactory performance does not improve, they risk termination. School leaders may hire a mentoring consultant for short durations to help the staff improve their performance.

Leadership or Teacher Turnover

The board and leadership team will strive to create an environment of growth, development, and continuous improvement for staff as well as students, in which the school may offer advancement opportunities to existing employees who are committed to and have invested their professional time and efforts to the mission and vision of the school. The governing board will handle leadership turnover by working with a search firm and Hillsdale College BCSI to find suitable replacements.

The principal and school operations manager will handle staff turnover by planning to have an extra teacher available to step in when a teacher leaves the school. We will also have a deep substitute pool to handle long term teacher absences. Our administrators will also be able to step into a vacant teacher position until we hire a permanent replacement, if necessary.

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.**

The principal is responsible for creating, managing, and overseeing professional development activities for the personnel reporting to him/her. The school operations manager is responsible for creating, managing, and overseeing professional development activities for the personnel reporting to him/her.

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.**

NCA's professional development program will support continuous learning and improvement, will enhance and expand the knowledge, skills, and abilities of teachers, staff, and administrators, and will contribute to accomplishing the school's goals, mission, and vision.

Professional Development Core Components

The Professional Core Components will support the educational program as follows:

Riggs Training

Consultants/trainers from Access Literacy may be used, and the school will develop in-house expertise in order to conduct internal training. Riggs support and instruction will also take place in school-wide and grade-specific training. Professional development opportunities may occur on-site or by attending local, state, and/or national conferences.

Core Knowledge Sequence Training

All staff and K-8 teachers will receive a minimum of five days of Core Knowledge professional development during the school's first year. All staff members will participate in the "Getting Started with the Sequence" program for Grades K-8. Likewise, the school administrators and curriculum leaders will participate in Core Knowledge Coordinator and Leadership Institute workshops, which can be scheduled during the school's allotted professional development days throughout the school year, with the first three days occurring in July or August.

Singapore Mathematics Training

The school will provide ongoing training to build Singapore Mathematics expertise among staff, to increase capacity and provide models that will utilize resources effectively. Singapore Math contains various elements which comprise the daily lessons (mental math, teacher directed, guided practice, activity, and independent practice) that align with their conceptual and skill building framework to teaching math. This framework presents a logical sequence addressing what needs to be included in a lesson, how the lesson is introduced and presented, how it progresses from the concrete to the abstract, and how to differentiate for students.

Hillsdale College Barney Charter School Initiative Teacher Training

BCSI will provide 10 days of training prior to the school's initial opening, and three days each summer thereafter.

In-service and Annual Summer Training

NCA will offer in-service training on relevant topics throughout the school year and will hold summer training sessions for all teachers, with additional days for new hires.

Socratic Seminar Training

The Socratic Seminar is a method of teaching designed to engage students in intellectual discussion by responding to questions using questions instead of answers. Students read a text item and are then asked open-ended questions. Hillsdale College will provide training on the Socratic Seminar and NCA may engage with other trainers as needed. Training will cover the following:

1. Formulating questions to encourage critical thinking, analyzing meaning, expression of ideas with clarity and confidence
2. Group norms
3. How to train students in Socratic Seminar discussions

Virtue Instruction Training

The school will provide training to staff in Virtue Instruction to include:

1. Pillars of virtue
2. Discipline and classroom management
3. Mediation and conflict resolution
4. Bullying prevention
5. Effective communication
6. Integrating character education into curriculum
7. Discussion techniques (like Socratic Seminars) to teach ethical reasoning

The principal and executive director will plan for and organize the trainings and work with vendors to ensure each component of the curriculum is covered. Teacher and administrator feedback will determine which areas require further training and support. Professional development in scaffolding, differentiated instruction, cognitive approaches to learning, and strategies to enhance memory will be targeted to each program as teachers become comfortable with the above components of the education program.

Additional Training

Instructional methodology/faculty development will begin with Hillsdale College training in classical education and continue at the school prior to and post opening day, including:

- | | |
|---|--|
| 1. Technology Integration/Digital Learning Support | 12. Parent Communication |
| 2. Assessment Process | 13. Department Binder Compositions |
| 3. Assessment and Data Analysis/Problem Solving | 14. Curriculum and Resources |
| 4. Classroom Management | 15. Writing Prompts |
| 5. Classroom Organization | 16. Student Discipline |
| 6. School Safety/Safe Learning Environment/School Culture | 17. Substitute Process and Substitute Lesson Plans |
| 7. Management/Leadership/Planning | 18. Certification Process |
| 8. General Support | 19. Well Ordered Language |
| 9. Student Growth/Achievement/Success | 20. Parent Newsletters |
| 10. Subject Content/Academic Standards for each course. | 21. Staff Dress Code |
| 11. Active Assailant Training | 22. Student Dress Code |
| | 23. Car Line Process |
| | 24. Music/Art/PE Rotation |
| | 25. Integrity and Ethical Conduct |

26. Lesson Planning
27. Monitoring Grade Level Progress

28. Relationship with Colleagues

Endorsements Training

Endorsement training will be supported on an ongoing basis to improve the ability to serve students seamlessly. Courses will include:

1. Gifted - Education of Special Populations
2. Gifted - Educational Procedures and Curriculum
3. Gifted - Guidance and Counseling
4. Gifted - Nature and Needs
5. Gifted - Theory and Development of Creativity
6. ELL - ESOL Curriculum and Materials Development
7. ELL - Testing and Evaluation of ESOL
8. ELL - Applied Linguistics
9. ELL - Methods of Teaching ESOL
10. ELL - Cross-Cultural Communication and Understanding
11. ELL - 18 Hour Survey
12. ELL - 60 Hour Survey
13. Reading - Foundations of Reading Instruction
14. Reading - Application of Research-Based Instructional Practices
15. Reading - Foundations of Assessment
16. Reading - Foundations and Applications of Differentiated Instruction
17. Reading - Demonstration of Accomplishments

Exceptional Student Education Certification and Training

The Student Services Director will provide exceptional student education training just prior to the school opening day. This training includes student services provided. Staff training will also be provided on guidelines and procedures established by the district related to meeting the needs of gifted students. The school's professional development program for its teachers will include participation in the training provided by the district for exceptional student education services. Faculty engaged in training per Rule 6a-4.01795 will be supported by the school.

Table 13.1 Internal and External Professional Development Structure

The table below identifies which training will be conducted internally and externally.

Training	Internal	External
Riggs Training	During the year the principal and curriculum coordinator will provide refresher training.	Access Literacy prior to the start of school.
Core Knowledge Sequence Training	During the year the principal and curriculum coordinator will provide refresher training.	Hillsdale mentors prior to the start of school and every summer.
Singapore Mathematics Training	During the year the principal and curriculum coordinator will provide refresher training.	Hillsdale mentors prior to the start of school and every summer.
Socratic Seminar Training	During the year the principal and curriculum coordinator will provide refresher training.	Hillsdale mentors prior to the start of school and every summer.

Training	Internal	External
Virtue Instruction Training	During the year the principal and curriculum coordinator will provide refresher training.	Hillsdale mentors prior to the start of school and every summer.
Additional Training	During the year the principal and curriculum coordinator will provide refresher training.	Hillsdale mentors prior to the start of school and every summer.
Endorsements		A combination of district training and authorized private trainers.
Exceptional Student Education	Student Services Director will provide training prior to school and throughout the year.	Staff will be encouraged in attaining their ESE certification.

Individual/Uniform Professional Development

All teachers and administrators will undergo group professional development in order to ensure uniform understanding of core components and alignment with the school's vision, mission, and standards. As teachers become highly skilled in the core components of the school's curriculum, accommodations will be made to allow for a more tailored and personalized professional development selection. This will also serve as a recruitment tool as teachers will have a budget to select professional development within a range of acceptable topics.

On an ongoing basis, individualized professional development will address needs in new staff, gaps, or areas needing improvement identified throughout the year. The table below identifies which training will be conducted uniform or individualized.

Table 13.2 Individual Professional Development

Training	Uniform	Individualized
Riggs Training	Just prior to school opening and every summer.	Refresher as indicated by teacher observations.
Core Knowledge Sequence Training	Just prior to school opening and every summer.	Refresher as indicated by teacher observations.
Singapore Mathematics Training	Just prior to school opening and every summer.	Refresher as indicated by teacher observations.
Socratic Seminar Training	Just prior to school opening and every summer.	Refresher as indicated by teacher observations.
Virtue Instruction Training	Just prior to school opening and every summer.	Refresher as indicated by teacher observations.
Additional Training	Just prior to school opening and every summer.	Refresher as indicated by teacher observations.
Endorsements		As teachers schedule them.
Exceptional student education	Just prior to school opening and every summer.	Refresher as indicated by teacher observations.

Evaluation of Professional Development Effectiveness

Effectiveness of NCA's professional development program will be evaluated and assessed based on student performance and teacher observation, monitoring, and feedback by teachers and administration.

Hillsdale College provides, at no cost to the school, extensive professional development and evaluation, both prior to school opening and on an ongoing basis once a school is operational. NCA intends for administration and teachers to participate in these excellent opportunities.

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?**

Professional Development Prior to School Opening

Instructional training will be conducted by BCSI during the summer prior to opening. All teachers and leaders will attend this training. Part of the training will include meeting experienced classical education teachers that have years of practice teaching, evaluating, and administering the Hillsdale curriculum. These experienced teachers share best practices that have been matured over years of instruction.

Hillsdale training will cover a variety of topics: Philosophical foundations of classical education; Overview of Core Knowledge (curriculum design); School culture/classroom management; history/science; math; grammar/literature/composition; phonics/spelling/handwriting instruction.

Additional professional development time will be devoted to coordination within grades and within disciplines. Teachers, staff, and administrators will also receive training in supporting ESE and ELL students. Additional specific training will be conducted as listed in Additional Training above in the weeks prior to the start of school.

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.**

Professional Development Days Planned

The school expects to have 20 days of professional development per year.

Calendar, Daily Schedule, and Common Planning

The following activities will be included in the school calendar and daily schedule:

1. 3-5 days of Hillsdale training over the summer.
2. 8-10 days of training for Gifted, ESOL/ELL or ESE training.
3. 7-10 days of professional development composed of common planning with grade or subject peers. This will allow mentoring and collaboration by the more experienced teachers. Each teacher is expected to be scheduled for five out of eight periods. One of the available periods are dedicated to common planning.

Staff Structure

Staff structure will be used to optimize professional development. The principal will lead the lower school (K-6) professional development and the dean of students will lead the Grades 7-12 teacher professional development. Lower school grade level teams and upper school subject (English language arts, science, mathematics, history, Latin, etc.) teams will collaborate to utilize the various experiences of each team member. An experienced team leader will be identified for each of the grades K-6 and each subject.

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.**

Plan for Recruiting Students

The school plans to advertise on social media, internet search engines, radio or other community publications, and at community events, with materials available in both English and Spanish. The school will have a website, which will be used for notifying parents about the school and which can be viewed in multiple languages. Informational meetings will be held at local libraries, community centers, and other public venues where members of the community can learn about the school. Flyers will be printed in English and Spanish, which will be distributed around town in local businesses.

Strategies for Reaching Target Populations

The school will reach families in poverty, academically low-achieving students, students with disabilities, and English Language Learners by targeted social media, conducting their informational meetings in community centers and venues near the school location. Flyers will be distributed in surrounding neighborhoods to ensure members of the community are aware of the school's opening and details regarding the meetings. We will seek to work with organizations such as local businesses and the surrounding churches. Interpreters will be in attendance at the information meetings to serve non-English speakers. Within the above targeted students, we will inform parents of benefits of a classical education for students who desire to learn and who have a yearning for knowledge. These students do not mind completing homework at home and they respect the studious atmosphere at their school.

- 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.**

NCA has plans to find a location in Collier County where the surrounding demographics are less diverse than the Collier community as a whole. Therefore, our efforts will include ensuring that families in surrounding communities are supplied with all of the information necessary to take advantage of this school choice opportunity, while helping parents to determine if a classical education is a match for their students. We are conscious of the information gap that often exists in lower-income communities with regard to available school choice options, and will take deliberate efforts to bridge the information gap for these families. The school will advertise the enrollment periods and process in all neighboring geographic areas, including to both residential homes as well as local

businesses for commuting parents. We have and will continue to seek out community influencers to assist with relaying information about the school and enrollment process to families. Our parent information sessions will be concentrated in the surrounding area, and will be advertised with targeted marketing efforts online and through signage, print, email, and telephone calls.

Any student who meets the state of Florida's eligibility requirements for attending a public school in Collier County may apply for admission to Naples Classical Academy. The school will not discriminate among applicants on the basis of age, disability, gender, ethnic or national origin, religion, or academic standing, since that information is not included in the application process. If enrollment exceeds the school's class size capacity, then we will perform a random lottery.

Marketing will include bilingual materials and staff available to answer enrollment questions. Enrollment announcements will be posted in public locations, such as libraries and community centers, with the local community language.

Students that represent the racial/ethnic balance reflective of the surrounding community will be targeted. We expect the demographic mix of the student body to fall between that of the neighboring school zones and CCPS as a whole:

Table 14.1 Student Ethnicity in Comparable Schools vs. Collier County Public School District

Ethnicity	Comparable Schools	CCPS
African American	3%	12%
Caucasian	48%	33%
Hispanic	44%	51%
Asian	1%	1%
Multi-Racial	<1%	2%
Pacific Islander	<1%	<1%
American Indian/Alaskan Native	<1%	<1%

Table 14.2 Socio-Economic Data per Comparable School

Comparable Schools	School ID	Enrolled Students	Free or Reduced Lunch %	ELL %	ESE %	Gifted %	Eco. Disad. %	White %	African American %	Hispanic %	Multi-Racial %
Big Cypress Elementary School	110331	890	62%	12.5%	14%	5%	57%	42%	8%	46%	0%
Corkscrew Elementary School	110441	596	51%	11.6%	18%	4%	43%	56%	0%	41%	0%
Estates Elementary School	110631	652	73%	10.7%	14%	3%	69%	0%	9%	89%	0%
Laurel Oak Elementary School	110391	961	27%	2.3%	10%	6%	24%	67%	1%	21%	0%
Palmetto Elementary School	110541	447	79%	11.4%	24%	4%	72%	35%	0%	55%	0%
Sabal Palm Elementary School	110471	538	82%	26.8%	16%	5%	66%	35%	0%	66%	16%
Veterans Memorial Elementary School	110521	811	35%	6.4%	14%	4%	34%	65%	1%	24%	0%
Vineyards Elementary School	110371	822	43%	6.6%	15%	5%	34%	60%	1%	35%	0%
TOTAL/WEIGHTED AVERAGE		5,717	53%	10%	15%	4%	47%	48%	3%	44%	2%

*Data was extracted from the Florida Department of Education online student information database.

During the open enrollment period, the school will monitor the geographic areas from which students are applying to ensure that our neighborhood outreach efforts are working. If necessary, the school will modify its outreach efforts to address any persisting information gap evident in the enrollment application statistics.

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.

Proposed Enrollment Policies and Procedures

The school will use the online software application SchoolMint for enrolling students. If the number of applications exceeds the number of openings, a lottery process for admission will be instituted for all applicants for each grade affected. After openings are filled, all others are put on a waiting list according to the order of the drawing. Students who are accepted are notified via an email sent to their designated point of contact. Students who do not confirm within the deadline specified forfeit their reserved enrollment seat for that school year. Parents of students accepted in the lottery will be sent instructions on completing the registration documents immediately after the lottery is drawn. The completed documents will need to be completed by a set deadline, in order to continue to hold the student's seat.

Student Selection Process

As per Florida Statute 1002.33, a lottery will be conducted at each grade level to select students for enrollment. All lotteries will be conducted in a manner that ensures each eligible student receives an equal chance of being selected. Applicants will be selected in random order until all applications have been ordered. In order of selection (with consideration of any applicable preference), applicants will be offered admission until all seats have been filled. The remaining students' names will be placed on an ordered waiting list in which their names were selected.

Enrollment Deadlines

The school operations manager shall develop an enrollment schedule each year to establish the enrollment deadlines. The initial student selection lottery will be conducted in the spring prior to the opening of the school year. The initial enrollment window must be at least 60 days and be advertised on the school's website and through other methods allowed for within the corporate budget. After the initial enrollment period, the school operations manager shall establish a regular schedule for the random selection of applications, and post this along with the enrollment schedule. The deadlines and process shall be clearly explained on the school's website.

Non-Discrimination

Consistent with state and federal statutes, the school will not discriminate against any student on the basis of race, color, religion, gender, age, national or ethnic origin, marital status, disability or handicap, sexual orientation or any other legally protected class. All students who are eligible to apply shall be included in the student selection lottery and have an equal chance of being selected. Publication of the enrollment process will include a non-discrimination statement.

Selection Process

The selection process will be conducted by the enrollment manager using third-party software to ensure all students have an equal chance of being selected for enrollment. On the dates specified within the enrollment schedule, the school shall abide by the following selection process:

All applicants will be placed into the lottery

All completed applications received within the enrollment period up until the enrollment deadline will be included in the lottery.

Determine Openings

The school operations manager, in accordance with direction from the governing board will determine the number of openings to be filled within the lottery process. The number of openings will be determined based on the contractual limits of the charter contract, facility limits, and enrollment limits.

Determine Students with Allowed Preferences

Students who will be granted preference in the lottery process, as described above, shall be identified, including a clear indication of why each student is being offered preference.

Select Students by Grade Level

The school shall use a computerized system which conducts a lottery within the following parameters. First, students who are allowed preference will be selected and rank ordered, followed by the remaining students at that grade level, who will be added to the rank-ordered list. The top number of students on the rank-ordered list equal to the number of openings that will be offered a position at the school. All remaining students will be added to the waiting list in the order selected. This process will be repeated for each grade level until all students have been ordered.

Parent Notification

After the lottery has been conducted the school operations manager shall ensure that the parents of the students who are being offered positions are properly notified. In addition, those students who are placed on the waiting list will be so notified.

Parent Acceptance

Parents will receive notification that they are being offered a position at the school following the student selection lottery. Parents will be given a deadline of at least three (3) days to respond to the school to confirm or decline the position at the school.

Maintenance of the Waiting List

In the event that more students apply to the school than openings are available, the remaining students will be added to the waiting list in the rank order selected in the lottery process. If a waiting list exists prior to a student lottery being conducted, positions will first be filled by the existing waiting list. Students selected in lotteries subsequent to the enrollment lottery will be added to the bottom of the waiting in the order they were selected. The school shall maintain the waiting list, and any time an opening becomes available, the lottery software shall contact the next student on the waiting list to offer a position at the school to the family.

Student Preferences

The school will give enrollment preferences to certain student populations as allowed in section 1002.33(10)(d) and required by F.S. 1002.31(2)(c).

The following students will be given a priority in the admission process under state law:

1. Students who were enrolled with the organization the year before.
2. Students whose parents are staff members with the organization.
3. Students whose parents are on the governing board of the organization.
4. Students who have siblings enrolled with the organization.

The school will not limit enrollment as allowed in sections 1002.33(10)(e). The school will serve students from the entire Collier County area as well as those from other Florida counties. Per F.S. 1002.31(4)(d), Collier students will not be displaced by students from other Florida counties.

Enrollment Timeline

Applications for enrollment will be accepted during the enrollment period. The school will begin accepting lottery applications in October of 2019. The enrollment period will end on January 2, 2020. If a lottery is required, it will be held within one day after the end of the enrollment period. The timeline for enrollment is in the table below:

Table 14.3 Enrollment Timeline

Step	Activity	Start	End
1	Advertise	October 1, 2019	December 31, 2019
2	Informational Sessions	October 1, 2019	December 20, 2019
3	Open Enrollment	December 1, 2019	December 31, 2019
4	Lottery	January 2, 2020	January 2, 2020
5	Registration	January 3, 2020	August 1, 2020

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.

Plans to Engage parents in the Life of the School

Parents will be given the opportunity to volunteer during lunch hour to help in the cafeteria and in individual classrooms as managed by the classroom teacher. They will also be encouraged to help organize and carry out fundraisers. Parents can also serve by leading after-school clubs. Parents can also volunteer to serve as chaperones for field trips.

Plans for Regular Communication with Parents

Naples Classical Academy has a website and a Facebook page which will be used to communicate with parents real-time, receive questions and feedback, and allow parents to communicate amongst

one another. Parent email addresses and cell phone numbers will be actively maintained and used to communicate regularly on school information and events via email and text.

Enrollment instructions, lottery information, and details regarding registration will be featured on the school website. Also, informational meetings will be given at community centers and local libraries where the community can learn about the school and how they can volunteer and/or register their child.

The school will hold regular parent meetings to keep parents informed and continue to educate them on the classical education model, school culture, and how they can help their students to be successful. Parents will be welcomed to volunteer for the school.

Parental Representative

The governing board will appoint a representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes. The parental representative exists to:

1. Help the school communicate with parents.
2. Help the parents understand the fundamental premises upon which the school functions.
3. Help schedule, promote and host student and parent activities, including parent volunteer opportunities.
4. Welcome new parents into the school, to foster parental understanding of and commitment to the school's vision, mission, values, and goals, and to instill in the new parents the need for their continued involvement and support of the school.

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.

Community Resources

Naples Classical Academy intends to have a positive impact on the Collier County community. Our school will participate in community events such as parades, runs/walks, tournaments, and other community charity events such as food drives, holiday assistance, etc. Specific events or community partnerships will be developed. Example community resources include:

- Champions for Learning: Golden Apple recognition program and the Take Stock in Children Program.
- The Junior Achievement: Embracing the external community leader to come in and deliver the Junior Achievement programs for the lower and middle school grades.
- Quest for Success: Encourage students to apply for the College Prep program.

Partnerships

The school will partner with one or more after-school care providers, such as Sports CLUB, Boys and Girls Club, Tae Kwon Do, and/or YMCA to allow students to continue their education after-school hours and pursue various interests. Our intention is to also have an on-site before and aftercare provider (or one located nearby the school), and other options for offsite care that will provide

transportation after school. NCA will also host various academic and interest clubs after school, some of which may be provided by community organizations.

The following community partnerships are planned:

Table 15.1 Planned Community Partnerships

Partner	Nature	Purpose	Terms	Scope of Services	Fees
Sports CLUB	Contract with parents	After-school care	Monthly fee	Special programs physical activities, homework support	Yes
Boys and Girls Club	Contract with parents	After-school care	Monthly fee	Special programs	Yes
Tae Kwon Do	Contract with parents	After-school physical activity	Monthly fee	Teaching a skill	Yes
YMCA	Contract with parents	After-school care	Monthly fee	Special programs	Yes

- 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). - See Attachment T.**

III. BUSINESS PLAN

Section 16: Facilities

If the site is acquired: N/A

If the site is not yet acquired:

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

Facility Needs

Phase 1: The school proposes to lease land and a building and if necessary, install portables in year one as Phase 1.

Phase 2: During year 1, the school will purchase land and build a single K-12 campus on an undeveloped parcel. Additional campuses are planned for future expansion if the school waitlist indicates the need.

Desired Location

A location for the facility has not been identified.

Desired Size and Layout of Phase 2

The desired size and layout call for a 67,245 square foot two-story building with primary grade classrooms located on the lower level and middle and secondary classes on the second floor. A multi-purpose space, with adjacent food warming capabilities, will serve as a cafeteria, gymnasium, and auditorium, on the first floor.

The upper floor will be serviced by an ADA (Americans with Disabilities Act) compliant elevator. Classrooms will be of such size as to comply with class-size mandates. A playground and recreation field will be included in the site plan. An emphasis on safety will be included in facilities design including a "single point of entry" and perimeter fencing.

The facility will meet the Florida building code and all fire code regulations. The school understands that it is not required to meet the SREF as specified in Florida statute 1002.33(18)(a). The NCA Board is planning to apply for tax exempt bond financing for the permanent facility.

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.

Facility Cost Estimate

The anticipated phase 2 facility building costs is \$13,650,735.

Facility Cost Derivation

The cost estimate is based on \$203 per square foot for a 67,245 square foot facility. This figure is derived from an identical project taking place in Martin County for a 2019 opening. The developer has built 25 such schools and has advised NCA that the cost is feasible if a similar building is

constructed in Collier for a 2021 occupancy. An additional \$2,000,000 is reserved for the land purchase.

Facility Funding Sources

Multiple lenders have funded similar projects in the past, once a charter has been granted. These include private loans, commercial financing and bond financing. Members of the founding team have been involved with various types of similar financing, including tax-exempt bond issues for charter school and commercial financing for other construction projects. Additional details are included in attachment U.

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

Facility Strategy and Schedule

Our team contains individuals that were instrumental in obtaining other charter school facilities in Florida and thus are well versed in the issues affecting facility development. We implemented Treasure Coast Classical Academy in two phases. The first phase is in a leased space, augmented with portable classrooms. The second phase is a new building currently under construction and expected to be completed in December 2019.

Prior to opening, the school will ensure the facilities are in compliance with Collier County, Florida, and federal statutes, municipal codes, regulations, and policies. The school will work with representatives from the Collier Sheriff's Office, Collier County Fire Department, a Collier County School District representative, Collier County Building Department, and the school's administration to help formulate an appropriate crisis response plan. The school's facilities will comply with the Florida Building Code, pursuant to Chapter 533; the Collier County Building Code; and the Florida Fire Prevention Codes pursuant to F.S. (633.025).

Table 16.1 Phase 2 Facility Schedule

Activity	Due
Site selected and design contract executed	March 2020
Site review: Facilities, Site Plan, Zoning	April 2020
Site plan approval	July 2020
Charter approved	July 2020
Land development permit	August 2020
Construction financing	August 2020
Finalize architectural design	August 2020
Construction drawings/plans approval	August 2020
Construction contract executed	October 2020
Apply for general building permit	October 2020
Land development	October 2020
Facility development	October 2020
Complete construction	July 2021
Certificate of occupancy	July 2021

I. Describe the back-up facilities plan.

In the event that the Phase 2 facilities are not completed in time for an August 2021 opening, we plan to continue occupying the leased facilities. The school is in the process of searching for leasable space to locate the most cost-effective, space for Phase 1. A worst-case scenario would be to take an additional planning year to complete the Phase 2 facility and moving into it in 2022.

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.

Transportation of charter school students shall be provided by NCA consistent with the requirements of subpart I.E. of chapter 1006 and s. 1012.45. The charter school will cooperate with the Sponsor in making arrangements that ensure that transportation is not a barrier to equal access for all students residing within a reasonable distance of the charter school as determined in our charter.

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.

Food Service Plan

The school will implement a food-service plan which will serve students who will purchase their lunch as well as students who qualify for free or reduced lunch and breakfast. The food service plan includes:

- Providing healthy, well-rounded meals to all students for breakfast and lunch.
- Participation in the National School Lunch Program (NSLP).
- Contracting with an approved food service vendor that is compliant with the National School Lunch Program (NSLP) with extensive experience. This vendor will be selected through an RFP process.
- The USDA vendor will provide any cash register hardware required.
- Meals will comply with the meal component and portion-size requirements of the NSLP.
- The food-service program will be conducted in an area that is sanitary and complies with all applicable health and safety requirements.
- Hiring of a nutrition services coordinator who will be trained on the NSLP program and will manage the food-service program.

Lunch Application Process

The process by which students will apply for free and reduced lunch is outlined below. Table 18.1 includes the budgetary assumptions for the food service program.

- Free and reduced meal applications will be included in the registration package. Each family will be required to complete a form.
- The applications will be processed by our food service staff, who will follow the USDA regulations for audits and income limits.
- The participating students will be entered into the district student information system by the school registrar.

Table 18.1 Food Service Budgetary Assumptions

Meal Assumptions	% of Students	Participation	Price to Student
Student Breakfast Revenue			
Free Payment	52%	60%	-
Reduced Payment	16%	40%	\$ 0.30
Full Payment	32%	5%	\$ 2.50
School Lunch Revenue			
Free Payment	52%	60%	-
Reduced Payment	16%	40%	\$ 0.40
Full Payment	32%	5%	\$ 4.20

Section 19: School Safety and Security

Outline the plan for school safety and security for students, staff, the facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ. A full plan that also includes procedures for unanticipated emergency situations will be required prior to school opening.

School Safety and Security Plan

NCA will comply with the Marjorie Stoneman Douglas Act and any subsequent acts of the Florida Legislature which will address school safety. NCA will follow the district's School Safety & Emergency Management Plans. The school will develop site-specific supplemental plans for each type of emergency, consulting with the relevant emergency operations and support agencies as required by law and its charter contract with the Sponsor. The school will control access to the buildings using SafeVisitor or a similar program and will have a single point of entry for the public.

The school security program will include security cameras, an alarm system; an access control system using key fobs, electronically controlled exterior doors, exterior lighted grounds, restricted road access, locked gates and fencing. The school's safety program will include performing the required emergency drills (fire and lockdown).

School staff, vendors and parent volunteers will undergo background screening.

School staff training will include CPR, safety procedures, security plans, and first aid. Students will be provided with information on bullying and drug and alcohol prevention.

Security Personnel

The school operations manager will designate a staff member to function as the school's security manager. The school will request that the county sheriff's office perform a security and safety assessment prior to opening. A safety assessment will be documented using the Florida Safe Schools Assessment Tool (FSSAT) as soon as the school staff have access to the tool. Under FS 1006.12, safe-school officers are required at each public school. Funds have been included in the budget for a school resource officer.

NCA will work with the district and the sheriff's office to implement one of the four (4) following alternatives:

1. Establish school resource officer programs, through a cooperative agreement with law enforcement agencies.
2. Commission one or more school safety officers for the protection and safety of school personnel, property, and students within the school.
3. Participate in the Coach Aaron Feis Guardian Program
4. Contract with a with a security agency to employ as a school security guard.

Security Technology

The school will purchase the SafeVisitor or similar system, which will be used to control access to the campus. Visitors will be required to provide their drivers' licenses to the receptionist, who will run a background check against national criminal databases and sex offender registries.

Security Equipment

The school will also install camera monitoring technology. This will enable both local and remote monitoring of selected spaces. The school will also include both a security monitoring system and a security access control system using key fobs.

Security Policies

Security policies will be developed that address school entry by visitors and local and remote camera monitoring of the exterior and interior spaces, once a school site is secured.

Threat Assessment Team

Complying with FS 1006.07(7), the school operations manager will establish a Threat Assessment Team whose duties include the coordination of resources and assessment and intervention with individuals whose behavior may pose a threat to the safety of school staff or students consistent with the model policies developed by the Office of Safe Schools.

The Threat Assessment Team will also initiate the following programs in the school:

1. Report determinations of security threats to the principal and the school operations manager.
2. Facility security assessment and improvement program.
3. Student crime watch program.
4. Emergency drills and emergency procedures.
5. Safety and security best practices: establish policies and procedures for the prevention of violence on school grounds, including the assessment of and intervention with individuals whose behavior poses a threat to the safety of the school community.
6. Conduct a school security risk assessment in accordance with s. 1006.1493.
7. Coordinate with the appropriate public safety agencies that are designated as first responders to the school's campus to conduct a tour of campus.
8. Staff safety training that includes threat assessment and response.
9. Parent safety trainings on the dangers of social media, and how to prevent, identify, and deal with sexual predators or online bullying.

Security Features

1. All visitors are channeled through the main entrance; all other doors remain locked.

2. All visitors are required to check into the front office and present their driver's license for a background check.
3. All staff and visitors must wear IDs.
4. At one of the three entry points to the school, students will show their student ID and keep it on them all day.
5. Remote-controlled locks.
6. Armed school security officer.
7. Six-foot fences.
8. Surveillance cameras.
9. Locking classroom doors.

Hope Scholarship

Pursuant to section 1002.40, the Hope Scholarship Program allows students who were subjected to an incident of violence or bullying an opportunity to transfer to another school, or to apply for scholarship funds to assist in enrolling and transferring to a private school. The school where the reported incident is responsible for the following:

- 1) Upon receipt of a report of an incident, the school principal, or his or her designee, shall provide a copy of the report to the parent and investigate the incident to determine if the incident must be reported as required by s. 1006.09(6). Notification must be consistent with the student privacy rights under the applicable provisions of the Family Educational Rights and Privacy Act of 1974 (FERPA).
- 2) Within 24 hours after receipt of the report, the principal or his or her designee shall provide a copy of the report to the parent of the alleged offender and to the superintendent.
- 3) Upon conclusion of the investigation or within 15 days after the incident was reported, whichever occurs first, the principal or his or her designee shall notify the parent of the Hope Scholarship Program and provide the parent with a completed Hope Scholarship Notification Form.

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 Attachments X. Proposed Operating Budget and W. Florida Charter School Revenue Estimating Worksheet.**
- 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. Start Up Budget, Y.2. Balance sheets, and Y.3. Revenue Projections and Source**
- 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.**

Startup Revenue Assumptions

The budgets presented reflect the experience of the school's founders and the financial team that planned the opening of Treasure Coast Classical Academy. The assumptions used are derived from knowledge of the school's mission, familiarity with the planned structure, and experience with a similar school plan. The school will obtain financing to cover initial expenses as defined in Table 20.1.

Table 20.1: Startup Line Item Revenue Assumptions

	Planning Year	Source
Unsecured Loan	\$500,000	The Optima Foundation
CSP Grant	\$575,000	CSP Grant
Bond or Commercial Financing	\$16,650,000	Lender TBD

Startup Budget Assumptions

The following assumptions were used in developing the expense projections for planning year startup phase:

1. **Revenue:** \$500,000 unsecured loan from The Optima Foundation. This is planned to be an unsecured loan at 8 percent for five years. (Interest-only for three years).
2. **Revenue:** \$575,000 CSP grant is based on prior team experience in obtaining grants.
3. **Revenue:** \$16,650,000 bond is assumed from a commercial lender or bond underwriter, such as SunTrust or BB&T. This loan is assumed to have a term of 35 years and 7.5 percent interest based upon a review of numerous recently completed bond deals. The financing will be interest-only for the first two years, and will be used to purchase the land and build the school. It also includes \$544,702 funds for FF&E. This loan will be obtained in the first year of operation.

Startup Expense Assumptions

Startup expenses include part year salaries and benefits for the principal, school operations manager, business manager, and the registrar. Also included are expenses for the following:

Table 20.2 Startup Expense Assumptions

Budget Line Item Name	Assumptions	Calculations
Legal Services	Based on experience with JCA & TCCA	\$25,000 per year
Board Expenses	Based on experience with JCA & TCCA	\$500 per member travel for training.

Budget Line Item Name	Assumptions	Calculations
Contracted Services HR Services and Startup Consultants	Based on experience with JCA & TCCA	HR Services are 3% of salary
Travel Expenses	Based on experience with JCA & TCCA	\$500 per trip to Hillsdale for training
Administration Equipment/Furniture/Furnishings	Based on experience with TCCA	Based on competitive bid for TCCA.
Administration Computers and Software	Based on experience with JCA & TCCA	\$650 per computer
Media/Direct Mail	Based on experience with JCA & TCCA	Minor mailing.
Mass Email System	Based on experience with JCA & TCCA	Constant Contact is \$700 per year.
Land/Land Improvements	Based on experience with JCA & TCCA	\$2,000,000 for 10 acres. \$500,000 site prep.
Building Construction	Based on experience with JCA & TCCA	\$203 per sqft
Building - Lease/Rent	Based on experience with JCA & TCCA	N/A
Interest and Fees	Based on experience with JCA & TCCA	7% and 8% loans.

Table 20.3 Ongoing Operational Revenue Assumptions

	Year 1	Year 2	Year 3	Year 4	Year 5
ENROLLMENT	786	897	983	1049	1107
FEFP	\$6,374,103	\$7,410,144	\$8,244,184	\$8,915,346	\$9,515,336
Food Service	\$459,378	\$526,560	\$578,611	\$616,741	\$650,030
Capital Outlay	\$0	\$0	\$513,560	\$543,420	\$568,400
Other Miscellaneous Local Sources	\$175,931	\$115,945	\$109,320	\$111,930	\$69,810

Ongoing Expense Assumptions

Expenses that are subject to inflation are increased by an inflation factor of one and a half percent per year in years 2-5. The net effect is that revenue inflation totals 10 percent and expense inflations total 7.5 percent over the five (5) years budgeted.

- Teacher starting salaries are planned to average \$44,522.
- Teacher Supplements will be provided for additional duties/certifications such as ELL, Gifted and ESE endorsements.
- Our Reserve Funds are planned to be three percent of revenue at the end of Year 1 and each year thereafter.
- Capital expenditures include FF&E (furniture and IT equipment).

Table 20.4 Ongoing Expense Assumptions

Budget Line Item Name	Assumptions	Calculation
Substitute Teachers	Based on experience with TCCA.	\$92 per day.
Contracted Exceptional Education Specialists	Based on prior experience with TCCA.	\$1,040 per IEP for external ESE consultant.
Instructional Materials (Textbooks, Workbooks, Testing Materials, Etc.)	Based on experience with JCA & TCCA	\$480 per student
Classroom Supplies Not Included Elsewhere	Based on experience with JCA & TCCA	\$84.51 per student
Basic Education Misc. Expenses	Based on experience with JCA & TCCA	None
Basic Education Software	Based on experience with JCA & TCCA	None
Teacher Computer Equipment	Based on experience with JCA & TCCA	\$581 Laptops per teacher \$330 iPads per classroom
Teacher Desks, Chairs, Tables, and Equipment/Furniture/Furnishings	Based on experience with JCA & TCCA	\$563 for desk \$120 for desk chair \$167 for shelves \$155 for file cabinet
Nurse Services to Create Health Plans	Based on experience with JCA & TCCA	\$100 per health plan
Materials and Supplies	Based on experience with JCA & TCCA	\$26,000 per year
Computer Equipment for administration	Based on experience with JCA & TCCA	\$581 per staff and 75 FSA testing computers
Training - Travel to Hillsdale	Based on experience with JCA & TCCA	\$500 per teacher
Technology Support	Based on experience with JCA & TCCA	\$800 per month for support
Technology Equipment	Based on experience with JCA & TCCA	\$53,000 networking equipment
Auditing Services	Based on experience with JCA & TCCA	\$9,000 per year
Legal Services	Based on experience with JCA & TCCA	\$20,000 per year
Board Expenses	Based on experience with JCA & TCCA	\$100 background check per board member
Administration Equipment/Furniture/Furnishings	Based on experience with JCA & TCCA	\$831 Desk \$161 Desk chair \$300 for 2 guests chars \$662 for file cabinets
Administration Computers & Software	Based on experience with JCA & TCCA	\$581 per staff

Budget Line Item Name	Assumptions	Calculation
		and 75 FSA testing computers
System Communication Services	Based on experience with JCA & TCCA	\$893 per month
Postage/Courier Services	Based on experience with JCA & TCCA	\$0.50 per letter for 5 letters per year per student
Media/Direct Mail	Based on experience with JCA & TCCA	Minor Direct Mail
Mass Email Services	Based on experience with JCA & TCCA	Constant Contact is \$700 per year.
Copier Lease	Based on experience with JCA & TCCA	\$23 per student
Building Construction	Based on experience with JCA & TCCA	\$136 per sqft
Contracted Accounting Services - Payroll and support	Based on experience with JCA & TCCA	\$52,000 per year
USDA Vendor	Based on experience with JCA & TCCA	\$319,368 for first year
Cafeteria Tables	Based on experience with JCA & TCCA	\$1,883 per table. 19 Tables
Custodial Consumable Supplies	Based on experience with JCA & TCCA	\$0.30 per sqft of facility
Electricity	Based on experience with JCA & TCCA	10.81 KW per sqft \$0.098 per KWHr
Water	Based on experience with JCA & TCCA	\$44 per student for water
Garbage Pickup	Based on experience with JCA & TCCA	\$50 per month Recycle \$500 per month trash
Property and Casualty Insurance	Based on experience with JCA & TCCA	\$74,784 Building
Liability Insurance	Based on experience with JCA & TCCA	\$28,525 General Liability/School Leaders Liability/ Employment Practices Liability/Crime
Contracted Services Custodial	Based on experience with JCA & TCCA	\$2.00 per sqft
Maintenance - Materials and Supplies	Based on experience with JCA & TCCA	\$15,000 per year
Interest and Fees	Based on experience with JCA & TCCA	7% on \$16,650,000 loan

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.

Revenue Shortfall Strategy

The school budget has two shortfall mitigation approaches.

1. NCA will have a reserve fund for unknown catastrophes which satisfies the law.
2. The second mitigation approach is to plan on reducing staff by combining roles or have staff transition to part time.

If NCA were to experience a 50 percent revenue situation due to a reduction in enrolled students we would take the following action(s):

1. Reduce the number of classroom teachers.
2. Reduce the utilities usage assumptions.
3. Negotiate less space in the lease for the campus.
4. Combine administration positions as appropriate.
5. Reduce the number of classroom computers.
6. Reduce the amount of classroom software.
7. Reduce the maintenance assumptions.
8. Reduce the number of textbooks purchased.
9. Reduce the amount of supplies purchased.
10. Reduce the amount spent by the board on legal fees, training, and travel.
11. Reduce administration travel.

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 school will set aside a reserve fund to cover cash flow shortfalls. This fund will be established from a line of credit from The Optima Corporation. Our estimate is that we will need a \$300,000 line of credit.

Planning Year Cash Flow

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.

	Sum of Planning Year Total	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.
Revenue Estimates													
Total Other Income	\$ 1,075,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000	\$ -	\$ -	\$ -	\$ 25,000	\$ 550,000
Total Income	\$ 1,075,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000	\$ -	\$ -	\$ -	\$ 25,000	\$ 550,000
Expense Estimates													
Function 5100 - Basic Instruction Sub Total	\$ 206,441	\$ -	\$ -	\$ 90	\$ 90	\$ 90	\$ 90	\$ 90	\$ 90	\$ 90	\$ 90	\$ 102,860	\$ 102,860
Function 5200 - Exceptional Education Sub Total	\$ 1,471	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 735	\$ 735
Function 6100 - Pupil Services Sub Total	\$ 795	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 398	\$ 398
Function 6200 - Instructional Media Services Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Function 6300 - Instructional/Curriculum Development Sub Total	\$ 952	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 476	\$ 476
Function 6400 - Instructional Staff Training Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Function 6500 - Instructional-Related Technology Sub Total	\$ 18,942	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,471	\$ 9,471
Function 7100 - Board Sub Total	\$ 23,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,500	\$ 11,500
Function 7300 - School Administration Sub Total	\$ 423,341	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 70,557	\$ 70,557	\$ 70,557	\$ 70,557	\$ 70,557	\$ 70,557
Function 7400 - Facilities Acquisition Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Function 7500 - Fiscal Services Sub Total	\$ 7,200	\$ -	\$ -	\$ 720	\$ 720	\$ 720	\$ 720	\$ 720	\$ 720	\$ 720	\$ 720	\$ 720	\$ 720
Function 7600 - Food Services Sub Total	\$ 9,505	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,752	\$ 4,752
Function 7900 - Operation of Plant Sub Total	\$ 4,116	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,058	\$ 2,058
Function 8100 - Maintenance of Plant Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Function 8200 - Administrative Technology Services Sub Total	\$ 19,561	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,781	\$ 9,781
Function 9200 - Debt Service Sub Total	\$ 48,016	\$ 3,460	\$ 3,460	\$ 3,460	\$ 3,460	\$ 3,460	\$ 3,460	\$ 3,460	\$ 3,460	\$ 3,460	\$ 3,460	\$ 6,710	\$ 6,710
Total Expenses	\$ 763,339	\$ 3,460	\$ 3,460	\$ 4,270	\$ 4,270	\$ 4,270	\$ 4,270	\$ 74,827	\$ 74,827	\$ 74,827	\$ 74,827	\$ 220,017	\$ 220,017
Total Income	\$ 1,075,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000	\$ -	\$ -	\$ -	\$ 25,000	\$ 550,000
Net Revenue	\$ 311,661	\$ (3,460)	\$ (3,460)	\$ (4,270)	\$ (4,270)	\$ (4,270)	\$ (4,270)	\$ 425,173	\$ (74,827)	\$ (74,827)	\$ (74,827)	\$ (195,017)	\$ 329,983
End of Month Operational Cash On Hand	\$ 336,661	\$21,540	\$18,081	\$13,811	\$9,541	\$5,271	\$1,002	\$426,175	\$351,349	\$276,522	\$201,696	\$6,678	\$336,661

Year One Cash Flow

	Sum of Year 1 Total	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.
Revenue Estimates													
Total FEFP Income	\$ 6,374,103	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175	\$ 531,175
Total Other Income	\$ 17,214,797	\$ 16,681,577	\$ 43,733	\$ 43,733	\$ 43,733	\$ 43,733	\$ 43,733	\$ 43,733	\$ 43,733	\$ 43,733	\$ 43,733	\$ 43,733	\$ 95,888
Total Income	\$ 23,588,900	\$ 17,212,752	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 627,063
Expense Estimates													
Function 5100 - Basic Instruction Sub Total	\$ 3,571,627	\$ 362,356	\$ 291,752	\$ 291,752	\$ 291,752	\$ 291,752	\$ 291,752	\$ 291,752	\$ 291,752	\$ 291,752	\$ 291,752	\$ 291,752	\$ 291,752
Function 5200 - Exceptional Education Sub Total	\$ 376,814	\$ 4,412	\$ 33,836	\$ 33,857	\$ 33,857	\$ 33,857	\$ 33,857	\$ 33,857	\$ 33,857	\$ 33,857	\$ 33,857	\$ 33,857	\$ 33,857
Function 6100 - Pupil Services Sub Total	\$ 83,384	\$ 2,792	\$ 7,690	\$ 7,290	\$ 7,290	\$ 7,290	\$ 7,290	\$ 7,290	\$ 7,290	\$ 7,290	\$ 7,290	\$ 7,290	\$ 7,290
Function 6200 - Instructional Media Services Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Function 6300 - Instructional/Curriculum Development Sub Total	\$ 53,171	\$ 3,159	\$ 4,494	\$ 4,552	\$ 4,552	\$ 4,552	\$ 4,552	\$ 4,552	\$ 4,552	\$ 4,552	\$ 4,552	\$ 4,552	\$ 4,552
Function 6400 - Instructional Staff Training Sub Total	\$ 30,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,250	\$ 15,250
Function 6500 - Instructional-Related Technology Sub Total	\$ 60,560	\$ 60,560	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Function 7100 - Board Sub Total	\$ 28,750	\$ 2,271	\$ 2,271	\$ 2,271	\$ 2,271	\$ 2,271	\$ 2,271	\$ 2,271	\$ 2,271	\$ 2,271	\$ 2,271	\$ 3,021	\$ 3,021
Function 7200 - General Administration Sub Total	\$ 872,653	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721	\$ 72,721
Function 7300 - School Administration Sub Total	\$ 746,098	\$ 85,659	\$ 43,656	\$ 61,395	\$ 61,395	\$ 61,395	\$ 61,395	\$ 61,395	\$ 61,395	\$ 61,395	\$ 61,395	\$ 62,812	\$ 62,812
Function 7400 - Facilities Acquisition Sub Total	\$ 15,026,346	\$ 3,681,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362	\$ 1,031,362
Function 7500 - Fiscal Services Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Function 7600 - Food Services Sub Total	\$ 520,223	\$ 29,614	\$ 3,969	\$ 48,664	\$ 48,664	\$ 48,664	\$ 48,664	\$ 48,664	\$ 48,664	\$ 48,664	\$ 48,664	\$ 48,664	\$ 48,664
Function 7800 - Pupil Transportation Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Function 7900 - Operation of Plant Sub Total	\$ 489,185	\$ 131,642	\$ 64,211	\$ 29,333	\$ 29,333	\$ 29,333	\$ 29,333	\$ 29,333	\$ 29,333	\$ 29,333	\$ 29,333	\$ 29,333	\$ 29,333
Function 8100 - Maintenance of Plant Sub Total	\$ 4,707	\$ 392	\$ 392	\$ 392	\$ 392	\$ 392	\$ 392	\$ 392	\$ 392	\$ 392	\$ 392	\$ 392	\$ 392
Function 8200 - Administrative Technology Services Sub Total	\$ 77,448	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454	\$ 6,454
Function 9100 - Community Service Sub Total	\$ 13,948	\$ 5,618	\$ -	\$ 833	\$ 833	\$ 833	\$ 833	\$ 833	\$ 833	\$ 833	\$ 833	\$ 833	\$ 833
Function 9200 - Debt Service Sub Total	\$ 121,064	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089	\$ 10,089
Total Expenses	\$ 22,076,478	\$ 4,459,101	\$ 1,572,897	\$ 1,600,965	\$ 1,600,965	\$ 1,600,965	\$ 1,600,965	\$ 1,600,965	\$ 1,600,965	\$ 1,600,965	\$ 1,600,965	\$ 1,618,382	\$ 1,618,382
Total Income	\$ 23,588,900	\$ 17,212,752	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 574,908	\$ 627,063
Net Revenue	\$ 1,512,421	\$ 12,753,651	\$ (997,988)	\$ (1,026,056)	\$ (1,026,056)	\$ (1,026,056)	\$ (1,026,056)	\$ (1,026,056)	\$ (1,026,056)	\$ (1,026,056)	\$ (1,026,056)	\$ (1,043,474)	\$ (991,319)
End of Month Operational Cash On Hand	\$ 1,637,859	\$13,072,711	\$12,057,120	\$11,013,462	\$9,969,804	\$8,926,146	\$7,882,488	\$6,838,830	\$5,795,172	\$4,751,514	\$3,707,855	\$2,646,780	\$1,637,859
Contract Reserve Fund Balance	\$ 191,223	\$ 15,935	\$ 31,871	\$ 47,806	\$ 63,741	\$ 79,676	\$ 95,612	\$ 111,547	\$ 127,482	\$ 143,417	\$ 159,353	\$ 175,288	\$ 191,223

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 executive director will oversee the management of the school's finances on behalf of the board. Naples Classical Academy will contract with a third-party firm, such as Grennan Fender Hess & Poparad, LLP, to provide assistance in managing the finances of the school. A third-party firm will provide:

- Preparation of budgets, cash flow analyses, and financial statements
- Preparation of reports for CCPS, State Department of Education and federal agencies
- Payroll processing
- Cash management
- Audit procurement assistance
- Fixed asset management
- Design and implementation of the internal control systems
- Remit payment for goods and services after verifying receipt

The NCA Board is ultimately responsible to ensure that appropriate policies and procedures are in place to prevent fraud, waste, and abuse, and to make certain that the school is operating effectively and efficiently according to the charter contract and state or federal laws. As a public school, NCA is a fiduciary of public funds, and must be accountable for the effective use of those funds in achieving the desired end of an excellent education for Collier County students. In addition, the policies will ensure the proper segregation of duties to minimize possible fraud. Board members will be trained on financial statements, governance, non-profit and governmental accounting, and internal controls. The executive director will supervise the business manager in managing the school finances. The business manager, under the direction of the executive director and in consultation with the school's principal, will prepare an annual budget for the board's approval. The board will be presented with the budget versus the current year's projected financial statements, and significant assumptions used to prepare the budget. Revenue assumptions, cost drivers, and variable versus fixed budgeted expenses will be outlined. In conjunction with the annual budget, a long-range budget will also be prepared, with particular attention to capital expenditures, maintenance, and reserves. The day-to-day accounting functions will be overseen by the business manager. A detailed policy and procedure manual (developed by the Compliance Manager and approved by the Board) will be maintained for general ledger accounting, bookkeeping, inventory, payables, receivables, and payroll functions. The manual must outline internal controls (first and second line of defense), preparer/reviewer roles, and recordkeeping requirements. It will also address how NCA's policies and procedures address state and federal requirements, including the Red Book. The manual's accounting and financial management policies and procedures will be reviewed by the Audit Committee no less than annually.

Reports will be presented to the board, including:

- Balance sheet
- Revenues vs. expenditures statement
- Budget vs. actual expenses
- Cash flow projections
- Bank reconciliations

An effective internal control structure and culture of compliance are critical for effective fiscal management. Therefore, the board will periodically engage an independent public accounting firm to review specific aspects of the school's internal controls. Recommendations and findings from this engagement will be reported to the board and the board's Audit Committee will be tasked to ensure that the recommended improvements are carried out by school staff.

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

The board will receive initial and periodic training on how to effectively monitor the school's financial health and compliance. New board members will also be required to receive training upon joining the board. The board will require the executive director to periodically complete a financial management best practices self-assessment to inform the board how policies and procedures fulfill recognized best practices in school governance. This self-assessment will be similar to the Financial Management Best Practices for Florida School Districts Self-Assessment, developed by Florida's Office of Program Policy Analysis & Government Accountability (OPPAGA), but it will be adapted for charter schools.

The board of directors will appoint an Audit Committee to specifically advise the board on matters of financial management and governance. The Audit Committee will be tasked with the following financial management oversight functions:

- Recommend the auditor for the annual financial statement audit
- Review the annual independent audit report
- Review school's financial statements
- Review the annual budget and budget versus actual results
- Review the school's financial management policies and procedures
- Review the Financial Management Best Practices Self-Assessment
- Advise the board on the performance of the school operations manager in regards to financial management

The board will review financial statements, including:

- Balance sheet
- Revenues vs. expenditures statement
- Budget vs. actual expenses
- Cash flow projections
- Monthly bank reconciliations

The board will be responsible to hire an independent auditor and receive the auditor's report. The board's Audit Committee will advise the board on the choice of independent auditor, but the responsibility ultimately resides with the board, and the auditor reports directly to the board of directors. The auditor will present its audit report and findings to the board, and the board will implement the auditor's recommendations, as appropriate.

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

NCA will adhere to the audit selection procedures outlined in Florida Statute 218.391 and Auditor General Requirements. The board will ensure that the report from the independent auditor is delivered

to the Sponsor as required in the charter contract and by state law, as applicable.

Audit Selection Process

Pursuant to section 218.391, F.S., the governing board will establish an Audit Committee to assist in selecting an auditor to conduct the annual financial audit. The Audit Committee shall:

1. Establish factors to use for the evaluation of audit services to be provided by a certified public accounting firm duly licensed under chapter 473 and qualified to conduct audits in accordance with government auditing standards as adopted by the Florida Board of Accountancy. Such factors shall include, but are not limited to, ability of personnel, experience, ability to furnish the required services, and such other factors as may be determined by the committee to be applicable to its particular requirements.
2. Publicly announce requests for proposals. Public announcements must include, at a minimum, a brief description of the audit and indicate how interested firms can apply for consideration.
3. Provide interested firms with a request for proposal. The request for proposal shall include information on how proposals are to be evaluated and such other information the committee determines is necessary for the firm to prepare a proposal.
4. Evaluate proposals provided by qualified firms. If compensation is one of the factors established pursuant to paragraph (a), it shall not be the sole or predominant factor used to evaluate proposals.
5. Rank and recommend in order of preference no fewer than three firms deemed to be the most highly qualified to perform the required services after considering the factors established pursuant to paragraph (a)

The school operations manager will serve as the liaison, on behalf of the board of directors, in conducting the annual audit with the selected independent public accounting firm. The school operations manager and business manager will prepare for the audit in consultation with the board's Audit Committee. Upon receipt of the annual request list from the audit firm, the requested items will be provided directly from the school operations manager to the auditors. The auditors are expected to perform onsite field work, including interviews with key personnel. A member of the board's Audit Committee and the chairman of the board will be included in these interviews.

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

NCA will use Xero Accounting software. Xero has integrated general ledger, accounts payable, purchasing, and bank reconciliation functions, in addition to non-profit-specific functions, such as donation summaries, expense categorization for governmental compliance and funds tracking. The system also allows tracking of inventory, which will be performed in accordance with state requirements. Xero is also an excellent record management tool, as data can be retained and accessible for historical periods, for the purposes of audit or public records requirements. Source documentation will also be retained electronically, and can be attached to the Xero record. Xero user management feature allows NCA to maintain appropriate separation of duties, such as dual authorization of wires, and journal entries. The software's reporting functionality will be used to generate financial statements in accordance with generally accepted accounting principles and in compliance with Financial and Program Cost Accounting and Reporting for Florida Schools (Redbook).

Records that are prepared outside of the accounting system, such as sub-ledgers, customized reports,

long-range budgets, and regulatory reporting, will be stored securely on the school's network. An organized system of books and records will be maintained with specific file and folder naming conventions, network map requirements, and classifications by report date and report type. A master network map will be maintained to show how reports are named, classified, and stored. These records will also be replicated to a backup server for business continuity purposes.

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

The approved Budget and Financial Statement Audit will be maintained on the school's website for public access.

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.

Financial statements will be presented to the authorizer in accordance with the charter contract and state law. These statements will be available to members of the public via public records request to either the authorizer or NCA.

The annual budget and annual audit report will be made available to the public as part of the supporting documentation for the board meeting agenda. These reports will be presented to the board in a public meeting, where the board will discuss and vote to approve them. Members of the public may comment on any of these items during the designated public comment period of the meeting. The approved budget will be made available on the school website.

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.

NCA may outsource the following at the specified rate:

Table 21.1 Outsourced Services

Function	Rate	Selection Criteria
Audit	\$9,000 a year	Request for Proposal
Comprehensive management to include financial, operational, and academic administration	12% of Revenue	NCA intends to contract with The Optima Foundation, the sole organization with experience in starting Hillsdale affiliated Classical Charter Schools in Florida. Services include an onsite school operations manager, compliance management, business management, website, enrollment, financial services, student information systems, and academic oversight.

G. Describe how the school will store financial records.

Financial records will be maintained by the business manager in electronic and paper formats. Paper documents will be stored in locked file cabinets in a locked office. Electronic documents will be stored on the school's off-site database server. In case of off-site backup failure, the backup vendor will be required to utilize a daily backup of all files.

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 following insurance coverage will be obtained:

1. Health Insurance
 - a. NCA will provide health, dental, life and other group insurances to employees.
2. Worker's Compensation Insurance - Part 1 and Part II shall have the following limits:
 - a. \$500,000 each accident
 - b. \$500,000 disease - each employee
 - c. \$500,000 disease – policy limit
3. Commercial General Liability Insurance
 - a. \$1 million per occurrence
 - b. \$3 million annual aggregate
 - c. Deductible of \$1,000 per occurrence
4. Property Coverage - Real and tangible property with a value greater than \$500.
5. School Leaders Errors and Omissions Insurance
 - a. \$1,000,000 per claim/annual aggregate
 - b. Maximum \$25,000 deductible
6. Builder's Risk Insurance - Insurance equal to the actual replacement cost for construction.
7. Fidelity Bonds
 - a. Fidelity bonds on all employees whose duties include receiving or disbursing cash.
8. Automobile Liability Insurance
 - a. One million per occurrence/\$3 million annual aggregate including all owned, hired, and non-owned automobiles.

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

The activities included should align with the start-up budget described earlier in the application. If an activity will be paid for by a source of funding not included in the start-up budget, it should be clearly indicated. (This timetable is a projection and is not meant to be binding on the school or sponsor. A formal timeline may be negotiated in the charter agreement)

Table 22.1 Start-up Projected Timetable

Activity	Date
Recruit governing board directors	July 2019
xii. Fundraising	July 2019 - August 2020
Fundraising – Initiate grassroots efforts	July 2019
Fundraising – Unsecured \$500,000 loan	November 2019
Fundraising – Secure Bond for construction	August 2020
vi. Governing board training	November 2019 - August 20220
Governing board training at Hillsdale	November 2019 or April 2020
Governing board training per 6A.6.0784	August 2020
i. Applying for and securing appropriate legal status	
Develop articles of incorporation and bylaws <i>(paid for by a source of funding not included in the startup budget)</i>	August 2019
Incorporate as a Florida non-profit (paid for prior to planning year) <i>(paid for by a source of funding not included in the startup budget)</i>	August 2019
Apply to IRS for 501(c)(3) nonprofit status <i>(paid for by a source of funding not included in the startup budget)</i>	August 2019
Submit application to Sponsor <i>(paid for by a source of funding not included in the startup budget)</i>	September 2019
Sponsor approves application	November 30, 2019
Work with Sponsor to develop contract	December 2019 - January 2020
ii. Identifying and securing facility	March 2020 - August 2021
Lease land and building for Phase 1	March 2020
Install Modular buildings if required	April 2020
Purchase land for Phase 2	October 2020
Initiate construction contract for Phase 2	October 2020
Obtain Certificate of Occupancy for Phase 2	July 2021
Prepare facility for operation for Phase 2	July 2020 – August 2021

Activity	Date
iii. Recruiting and hiring staff	January 2020 - July 2020
Recruit and hire principal and registrar	January 2020
Classical recruitment fair at Hillsdale College	February 2020
Recruit and hire school operations manager, business manager and administrative assistant	June 2020
Recruit and hire administration, faculty and staff	July 2020
viii. Recruiting Students	October 2019 – July 2020
Initiate collecting letters of intent	October 2019
Initiate enrollment process	December 1, 2019
Conducting Informational sessions	October 1, 2019 – March 2, 2020
ix. Enrollment Lottery (if required)	January 2, 2020
Initiate student registration	January 3, 2020
iv. Staff training	June 2020 – August 9, 2020
Hillsdale Classical Charter School Conference	June 2020
Train administration, faculty and staff	July 2020 - August 2020
vii. Policy adoption by board	October 2019 - June 2020
Prepare and finalize policies	October 2019 - May 2020
Board adopts policies	June 2020
v. Finalizing curriculum and other instructional materials	February 2020 - March 2020
x. Establishing financial procedures	March 2020 - July 2020
xi. Securing contracted services	April 2020 - August 2020
xiii. Finalizing transportation and food service plans	April 2020 - June 2020
Finalize food service plan	June 2020
Finalize transportation plan	June 2020
xiv. Procure furniture, fixtures, equipment	April 2021 - July 2020
Baseline furniture, fixtures, equipment required	April 2020
Issue purchase orders for furniture, fixtures, equipment	June 2020
Receive furniture, fixtures, equipment	July 2020
xv. Procure instructional materials	April 2020 - July 2020
Baseline instructional materials required	April 2020
Issue purchase orders for instructional materials	June 2020
Receive instructional materials	July 2020
First day of school	August 12, 2020

CHART OF ATTACHMENTS

- A. Evidence of teacher and parental support for conversion, if applicable.
- B. Sample daily school schedule and annual school calendar
- C. Sample curriculum scope and sequence
- D. Reading curriculum
- E. Pupil Progression plan, if applicable
- F. Assessment Schedule
- G. Proposed discipline policy or student code of conduct, if applicable
- H. Articles of incorporation
- I. 501(c)(3) tax-exempt status determination letter (or copy of the filing form)
- J. Governing board bylaws
- K. Governing board code of ethics and conflict of interest policy
- L. For each board member, a board member information sheet, resume, and Statement of Assurances (templates provided)
- M. Organization charts that show the school governance, management, and staffing structure in 1) the pre-operational year; 2) the first year of operation; 3) at the end of the charter term; and 4) when the school reaches full capacity, if in a year beyond the first charter term
- N. Job description for the school leader and, if this person is already identified, his or her resume
- O. If the school leader is not yet identified, the qualifications the school will look for in a school leader
- P. Job description(s) and qualification requirements for each administrative or leadership position other than the school leader
- Q. Job description(s) and qualification requirements for the school's teachers
- R. Personnel policies, if developed
- S. Student enrollment application
- T. Evidence of demand for the school, if applicable
- U. Evidence of facility funding sources, if applicable
- V. Draft rental agreement or lease for facility, if applicable
- W. Florida Charter School Revenue Estimating Worksheet
- X. Proposed Operating Budget
- Y. Proposed Startup Budget
- Z. Evidence of external funding (e.g. foundations, donors, grants), if applicable.

Addendum (as applicable)

- AA. Commissioner's letter(s) of verification of high-performing status – N/A
- BB. ESP's organization chart – N/A
- CC. ESP's organization chart after any anticipated growth – N/A
- DD. Applicant history worksheet - Attached
- EE. Draft contract between school and ESP – N/A
- FF. Applicant may attach up to an additional ten pages of supplemental material:
 - FF.1. After-School Clubs and Sports
 - FF.2. Hillsdale College Barney Charter School Initiative Model Contract

A. Evidence of teacher and parental support for conversion, if applicable.

This item is not applicable.

B. Sample daily school schedule and annual school calendar

Table B.1 Sample Daily School Schedule

Grade Level	Start Time	End Time	Minutes Per day	School Days per Week	Annual School Days	Annual Instructional Hours
K-6	7:55 a.m.	3:00 p.m.	375	5	180	1,121
7-8	7:55 a.m.	3:00 p.m.	359	5	180	1,074
9-12	7:55 a.m.	3:00 p.m.	359	5	180	1,074

Note: Instructional hours exclude lunch and time between classes. We plan for the last day of school to be an early release day. Thus, half a day of instruction was removed from our annual instructional hours.

Table B.2 Sample Daily Class Schedule (K-6)

Times	Instructional Minutes	Activity
7:55-8:00	-	Principal and teachers greet students
8:00-8:50	50	Reading/Phonics
8:50-9:40	50	Math
9:40-10:20	40	History
10:20-10:50	30	Science
10:50-11:20	30	Enrichment
11:20-11:50	30	PE/Lunch (grade dependent)
11:50-12:10	-	Lunch/PE (grade dependent)
12:10-12:50	40	Language Arts/Writing/Grammar
12:50-1:30	40	Enrichment
1:30-1:50		Recess
1:50-2:30	40	Enrichment
2:30-2:55	25	Specialty (Music/Art/Spanish)
2:55-3:00		Release to carline and buses
Total	375	

Table B.3 Middle School and High School Sample Daily Class Schedule

Daily Schedule (Grades 7-8)			Daily Schedule (Grades 9-12)		
Times	Instructional Minutes	Activity	Times	Instructional Minutes	Activity
7:55-8:00	-	Principal and teachers greet students	7:55-8:00	-	Principal and teachers greet students
8:00-8:47	47	Period 1	8:00-8:47	47	Period 1
8:52-9:39	47	Period 2	8:52-9:39	47	Period 2
9:44-10:31	47	Period 3	9:44-10:31	47	Period 3
10:36-11:23	47	Period 4	10:36-11:23	47	Period 4
11:28-11:49		Lunch	11:28-11:49		Lunch
11:49-12:19	30	Period 5	11:49-12:19	30	Period 5
12:24-1:11	47	Period 6	12:24-1:11	47	Period 6
1:16-2:03	47	Period 7	1:16-2:03	47	Period 7
2:08-2:55	47	Period 8	2:08-2:55	47	Period 8
2:55-3:00		Release	2:55-3:00		Release
Total	359		Total	359	

Table B.4 Annual Calendar

Board Approved 2020-2021 Academic Calendar ~ TBD

July							January							
M	T	W	Th	F	S*	T*	M	T	W	Th	F	S*	T*	
		1	2	3								84	101	
6	7	8	9	10			X	5	6	7	8	88	105	
13	14	15	16	17			11	12	13	14	15	93	110	
20	21	22	23	24		5	X	19	20	21	22	97	114	
27	28	29	30	31		10	25	26	27	28	29	102	119	
*S = Student Days = 180 days *T = Teacher Days = 203 days 20 Teachers Start Date 20-31 Teacher Orientation Training							1-4 Winter Break (No School) 5 Classes Resume 8 2Q Report Cards Posted 18 Martin Luther King Jr. Day Holiday (No School)							
August							February							
M	T	W	Th	F	S*	T*	M	T	W	Th	F	S*	T*	
3	4	5	6	7		15	1	2	3	4	5	107	124	
10	11	12	13	14	3	20	8	9	10	11	12	112	129	
17	18	19	20	21	8	25	X	16	17	18	19	116	133	
24	25	26	27	28	13	30	22	23	24	25	26	121	138	
31					14	31						121	138	
3-11 Teacher Orientation Training 12 Students' First Day							5 3rd Q Mid-Quarter 12 Interim Reports Posted 15 President's Day Holiday (No School)							
September							March							
M	T	W	Th	F	S*	T*	M	T	W	Th	F	S*	T*	
	1	2	3	4	18	35	1	2	3	4	5	126	143	
X	8	9	10	11	22	39	8	9	10	11	12	131	148	
14	15	16	17	X	26	43	X	X	X	X	X	131	148	
21	22	23	24	25	31	48	X	X	X	23	24	25	135	152
X	29	30			33	50	29	30	31			138	155	
					33	50						138	155	
7 Labor Day Holiday (No School) 11 1st Q Mid-Quarter 17 Interim Reports Posted 18 No School for Teachers or Students 28 No School for Teachers or Students							12 End of 3rd Quarter 15-22 Spring Break (No School) 26 3Q Report Cards Posted							
October							April							
M	T	W	Th	F	S*	T*	M	T	W	Th	F	S*	T*	
			1	2	35	52				1	X	139	156	
5	6	7	8	9	40	57	X	6	7	8	9	143	160	
12	13	14	15	X	44	61	12	13	14	15	16	148	165	
19	20	21	22	23	49	66	19	20	21	22	23	153	170	
26	27	28	29	30	54	71	26	27	28	29	30	158	175	
15 End of 1st Quarter 16 No School for Teachers or Students 23 1Q Reports Cards Posted							2 No School for Teachers or Students 5 No School for Teachers or Students 23 4th Q Mid-Quarter 30 Interim Reports Posted							
November							May							
M	T	W	Th	F	S*	T*	M	T	W	Th	F	S*	T*	
												158	175	
2	3	4	5	6	59	76	3	4	5	6	7	163	180	
9	10	11	12	13	64	81	10	11	12	13	14	168	185	
16	17	18	19	20	69	86	17	18	19	20	21	173	190	
X	X	X	X	X	69	86	24	25	26	27	28	178	195	
30					70	87	X					178	195	
13 2nd Q Mid-Quarter 20 Interim Reports Posted 23-24 Emergency Make up Day(s) 25-27 Thanksgiving Break (No School)							31 Memorial Day Holiday (No School)							
December							June							
M	T	W	Th	F	S*	T*	M	T	W	Th	F	S*	T*	
	1	2	3	4	74	91		1	X	3	4	180	198	
7	8	9	10	11	79	96	7	8	9	10	11	180	198	
14	15	16	17	18	84	101	14	15	16	17	18	180	198	
X	X	X	X	X	84	101	21	22	23	24	25	180	203	
					84	101	28	29	30	31		180	203	
18 End of 2nd Quarter 21-31 Winter Break (No School)							2 End of 4th Quarter 2 Students Last Day: Early Dismissal 3 4Q Report Cards Posted 3 Post School Day (Teachers Only) 21-25 Teacher Training (Preliminary dates)							

C. Sample curriculum scope and sequence

Barney Charter School Initiative's Scope and Sequence

The following pages are excerpted from the Barney Charter School Initiative's Scope and Sequence for each of the major subjects from kindergarten through 12th grade (first, sixth, and 11th grades are included in this document).

Portions of this work are based on the *Core Knowledge® Sequence*, an original work of the Core Knowledge® Foundation made available through licensing under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License. This does not in any way imply that the Core Knowledge Foundation endorses this work.

The BCSI Scope and Sequence differs most significantly from the Core Knowledge Sequence in Literacy, Grammar, and Math, though changes are not limited to these subjects. In Literacy the BCSI Scope and Sequence is based on the Riggs Institute's *Writing and Spelling Road to Reading and Thinking* as supplemented and modified by Access Literacy, LLC. In Grammar and Math, the BCSI Scope and sequence is based, respectively, on the *Well-Ordered Language* series and curriculum from Singapore Math. The Barney Charter School Initiative has provided a scope and sequence for Latin from Grades 6-9 and for all required subjects in Grades 9-12.

The BCSI Scope and Sequence includes resource recommendations for teachers to pair with the listed subject matter. In Mathematics, Literature, Literacy, and Grammar, these resources are directly paired to the scope and sequence items, and fidelity to the curriculum requires that these resources be followed quite closely. In Science, History, Visual Arts, and Music, however, these resources should be viewed as aids to teaching the curriculum, but not as the curriculum itself. Teachers need not employ all of a given science textbook, for example, and fidelity to the curriculum requires that teachers of these subjects use discretion to teach each topic from the BCSI Scope and Sequence using the best available resources appropriate to students' grade level.

The BCSI Scope and Sequence as presented here is intended to offer grade-level guidance based upon the average or slightly-better-than average performance of students in a mature school. In skill-based subject areas (especially Literacy and Math), this guidance may need to be tailored for a specific school or student. New schools, for example, will need to follow special recommendations for teaching literacy, and all schools are likely to have some students working a year or more behind the BCSI Scope and Sequence in Math.

First Grade

I. Phonics & Literacy

Resources:

- *Writing and Spelling Road to Reading and Thinking*, Level I, Riggs Institute
- *Grammar/Writing Lessons* from Access Literacy
- Box of Phonogram Cards, Riggs Institute
- *Update/Enhancement Packet* from Access Literacy
- *Wall Charts* (Get ½ of the box from your K teacher)
- *The ABC's and All Their Tricks*, Margaret Bishop
- *Primary Phonics*, Barbara Makar
- Stevenson's Supplemental Readers 1-20
- Texts for reading practice at increasing levels of difficulty (ex. *Go Dog Go*, *Mrs. Brice's Mice*, *Owls Home*, *Frog & Toad* books, etc.)
- *Test Lessons in Primary Reading*, McCall-Harby
- *Test Lessons in Primary Reading* (Teacher's Edition), McCall-Harby
- *My English Orthography Notebook*, Access Literacy

- a. New Schools: In the first year of a school, 1st grade teachers should begin with Lesson 1 of the Level I manual and proceed at a pace of approximately one lesson per day, or one spelling-vocabulary list every two-three weeks, through the entire year. Aim to complete vocabulary through list 10.
- b. Other Schools: After a school is established, most first-grade students will be well acquainted with the Level I program from Kindergarten. To begin the new school year, teachers should take two weeks to review handwriting, phonograms, and the Kindergarten words. Then teachers should assess the class ability level using the assessments and related instructions on pages 29-42 of the Level I manual. Teachers should grade each test by counting the number of correctly spelled words until a student misses five words in a row. The class average should then be compared to the equivalency table on page 33, and this score will indicate the spelling list with which the class should begin. From this starting point, teachers should proceed at a pace of approximately one lesson per day and one spelling-vocabulary list every two to three weeks, through the entire year. Teachers should aim to finish list 14, though progress may go slightly slower.

- c. Students should make daily entries in their own copy of *My English Orthography Notebook* such that the notebook is filled, or nearly filled, by the end of the school year.
- d. Students need approximately 30 minutes per day for the practice of reading, which can be accomplished using reading groups. The students should begin using *Primary Phonics* and Stevenson Supplemental Readers as practice texts. Once a student has completed those 100 books, the teacher needs to provide the student with texts at his reading level for daily reading practice. The teacher should be working with the group of the most struggling readers daily. The better readers can read in partners. If additional adults are available, they can oversee a small group of students.

II. Literature

Resources:

- Text Resources, Grade 1, Core Knowledge Foundation
- Listen, My Children, First Grade, Core Knowledge Foundation
- What Your First Grader Needs to Know, Core Knowledge Foundation
- *The Children's Book of Virtues*, William J. Bennett
- *The House at Pooh Corner*, A.A. Milne
- *Pinocchio*, Carlo Collodi

a. Poetry

Listen, My Children: Poems for First Graders

◆ Poems:

Hope, Langston Hughes

I Know All the Sounds the Animals Make, Jack Prelutsky

My Shadow, Robert Louis Stevenson

The Owl and the Pussycat, Edward Lear

The Pasture, Robert Frost

The Purple Cow, Gelett Burgess

Rope Rhyme, Eloise Greenfield

Sing a Song of People, Lois Lenski

Solomon Grundy, traditional

The Swing, Robert Louis Stevenson

Table Manners (also known as “The Goops), Gelett Burgess
Thanksgiving Day (“Over the river and through the wood”), Lydia
Maria Child
Washington, Nancy Byrd Turner
Wynken, Blynken, and Nod, Eugene Field

b. Fiction

◆ Novels

Pinocchio, by Carlo Collodi
The House at Pooh Corner, A.A. Milne

◆ Stories

The Children’s Book of Virtues
The Boy and the Dike
The Boy Who Cried Wolf
Indian Cinderella
What Your First Grader Needs to Know
The Frog Prince
Hansel and Gretel
How Anansi Got Stories from the Sky God
It Could Always Be Worse
Jack and the Beanstalk
The Knee-High Man
Medio Pollito
The Pied Piper of Hamelin
The Princess and the Pea
Puss-in-Boots
Rapunzel
Rumpelstiltskin
Sleeping Beauty
Issun Boshi
Tom Thumb
Why the Owl Has Big Eyes

The Tale of Peter Rabbit, Beatrix Potter

Text Resources, Grade 1

Tales of Br'er Rabbit (recommended tales: Br'er Rabbit Gets Br'er Fox's Dinner; Br'er Rabbit Tricks Br'er Bear; Br'er Rabbit and the Tar Baby)

◆ Aesop's Fables:

The Children's Book of Virtues

The Boy Who Cried Wolf

What Your First Grader Needs to Know

The Dog in the Manger

The Wolf in Sheep's Clothing

The Maid and the Milk Pail

The Fox and the Grapes

The Goose and the Golden Eggs

◆ Different Lands, Similar Stories

Text Resources, Grade 1, Core Knowledge Foundation

Lon Po Po

Little Red Riding Hood

Thumbelina

Little Finger of the Watermelon Patch

The Egyptian Cinderella

The Korean Cinderella

Yeh-Shen: A Cinderella Story from China

The Children's Book of Virtues

The Indian Cinderella

◆ Literary Terms

Characters, heroes, heroines

Drama: actors, actresses, costumes, scenery, props, theater, stage, audience

c. Sayings and Phrases:

What Your First Grader Needs to Know

A.M. and P.M.

An apple a day keeps the doctor away.
Do unto others as you would have them do unto you.
Fish out of water
Hit the nail on the head.
If at first you don't succeed, try, try again.
Land of Nod
Let the cat out of the bag.
The more the merrier.
Never leave till tomorrow what you can do today.
Practice makes perfect.
Sour grapes
There's no place like home.
Wolf in sheep's clothing

III. History and Geography

Teacher Resources:

- *The Story of the World, Volume 1: Ancient Times*, Susan Wise Bauer
- *A History of the United States and Its People*, Edward Eggleston
- *A History of US, Book 1: The First Americans*, Joy Hakim

Read-aloud Resources:

- Core Knowledge *Tell It Again!* Read-Aloud Anthologies and Flipbooks (available in PDF as part of the Core Knowledge Language Arts resources at coreknowledge.org):
 - o *Early World Civilizations*
 - o *Early American Civilizations*
 - o *A New Nation: American Independence*
 - o *Frontier Explorers*
- Various trade publications, including:
 - o *A Visit to Egypt*, Peter and Connie Roop
 - o DK Eyewitness Books (useful as a visual aid)
 - o *And Then What Happened, Paul Revere?*, Jean Fritz
 - o *The Inca Empire*, Sandra Newman
 - o *The Story of the Liberty Bell*, Natalie Miller
 - o *Tomie dePaola's Book of Bible Stories*, Tomie dePaola
 - o *Muhammad*, Demi

Fall Semester –

a. Geography

♦ Spatial Sense:

Name your continent, country, state, and community

Understand map keys, legends, and symbols

Understand North, South, East, and West on a map

Identify major oceans: Pacific, Atlantic, Indian, Arctic

Identify seven continents: Asia, Europe, Africa, North America,
South America, Antarctica, Australia

Locate: Canada, United States, Mexico, and Central America

Locate: Equator, Northern Hemisphere, Southern Hemisphere,
North Pole, and South Pole

- ◆ Geographical Terms and Features: peninsula, harbor, bay, island

b. Early World Civilizations

- ◆ Mesopotamia: The “Cradle of Civilization”

Importance of Tigris and Euphrates Rivers

Development of writing, why writing is important to the
development of civilization

Code of Hammurabi, why rules and laws are important to the
development of civilization

- ◆ Ancient Egypt

Geography: Africa, Sahara Desert

Importance of Nile River, floods, and farming

Pharaohs: Tutankhamen, Hatshepsut

Pyramids and mummies, animal gods, Sphinx

Writing: Hieroglyphics

c. History of World Religions

- ◆ Judaism

Belief in one God

Israel, Chanukah, Star of David, Torah, synagogue

Important stories: Noah and the Flood, Exodus, 10

Commandments, David and Goliath

- ◆ Christianity

Christianity grew out of Judaism

Jesus, meaning of “messiah”

Christmas and Easter, symbol of the cross

Important stories: Nativity, Visit of the Magi, Feeding of the 5000,
Good Samaritan, Death and Resurrection

♦ Islam

Originated in Arabia, spread worldwide

Followers are called Muslims

Allah, Muhammad, Makkah, Qur'an, mosque

Symbol of crescent and star (found on the flags of many mainly
Islamic nations)

Important stories: Early life of Muhammad, Revelation to
Muhammad, Night Journey, Flight from Mecca

d. Modern Civilization and Culture: Mexico

♦ Geography:

North American continent, locate Mexico relative to Canada and the
US

Central America, Yucatan Peninsula

Pacific Ocean, Gulf of Mexico, Rio Grande

Mexico City

♦ Culture:

Indian and Spanish heritage

Traditions: fiesta, piñata

National Holiday: September 16, Independence Day

Spring Semester –

a. Early People and Civilizations

♦ The earliest people: hunters and nomads

Crossing from Asia to North America (the land bridge as one
possibility)

From hunting to farming

Gradual development of early towns and cities

♦ Early American Civilizations

Maya in Mexico and Central America

Aztecs in Mexico: Moctezuma (Montezuma), Tenochtitlan (Mexico City)

Inca in South America (Peru, Chile): Cities in the Andes, Machu Picchu

b. Early Exploration and Settlement

- ◆ Columbus

- ◆ The Conquistadors

The search for gold and silver

Hernan Cortes and the Aztecs

Francisco Pizarro and the Inca

Diseases devastate Native American population

- ◆ English settlers

The story of the Lost Colony: Sir Walter Raleigh, Virginia Dare

Virginia: Jamestown, Captain John Smith, Pocahontas and

Powhatan

Slavery, plantations in Southern colonies

Massachusetts: Pilgrims, Mayflower, Thanksgiving Day,

Massachusetts Bay Colony, the Puritans

c. The American Revolutions

- ◆ Locate the original 13 colonies

- ◆ The Boston Tea Party

- ◆ Paul Revere's ride, "One if by land, two if by sea."

- ◆ Minutemen and Redcoats, the "shot heard round the world."

- ◆ Thomas Jefferson and the Declaration of Independence

- ◆ Fourth of July

- ◆ Benjamin Franklin: patriot, inventor, writer

- ◆ George Washington: military commander, first president, Martha Washington, capital city named Washington

- ◆ Legend of Betsy Ross and the flag

d. Early Exploration of the American West

- ♦ Daniel Boone and the Wilderness Road
 - ♦ The Louisiana Purchase: explorations of Lewis and Clark, Sacagawea
 - ♦ Geography: Locate Appalachian Mountains, Rocky Mountains, Mississippi River
- e. Symbols and Figures: recognize and become familiar with the significance of
- ♦ Liberty Bell
 - ♦ Current US president
 - ♦ American flag
 - ♦ Bald eagle

III. Mathematics

Resources:

- Primary Mathematics Textbooks 1A & 1B, US Edition, Singapore Mathematics
- Primary Mathematics Workbooks 1A & 1B, US Edition, Singapore Mathematics
- Primary Math HOME Instructor Guides 1A & 1B, US Edition, Singapore Mathematics

Resources:

Fall Semester –

- a. Numbers 0 to 10
 - ♦ Counting
- b. Number Bonds: making number stories
- c. Addition
 - ♦ Making addition stories
 - ♦ Addition with number bonds
 - ♦ Other methods of addition
- d. Subtraction
 - ♦ Making subtraction stories
 - ♦ Methods of subtractions
- e. Ordinal Numbers: naming position

- f. Numbers to 20
 - ♦ Counting and comparing
 - ♦ Addition and subtraction
- g. Shapes
 - ♦ Common shapes
- h. Length
 - ♦ Comparing length
 - ♦ Measuring length
- i. Weight
 - ♦ Comparing weight
 - ♦ Measuring weight

Spring Semester –

- j. Comparing numbers
 - ♦ Comparing numbers
 - ♦ Comparison by subtraction
- k. Graphs: Picture Graphs
- l. Numbers to 40
 - ♦ Counting
 - ♦ Tens and ones
 - ♦ Addition and subtraction
 - ♦ Adding three numbers
- m. Multiplication
 - ♦ Adding equal groups
 - ♦ Making multiplication stories
 - ♦ Multiplication within 40
- n. Division: sharing and grouping
- o. Halves and quarters: making halves and quarters
- p. Time: telling time
- q. Numbers to 100
 - ♦ Tens and ones

- ♦ Order of numbers
 - ♦ Addition within 100
 - ♦ Subtraction within 100
- r. Money
- ♦ Bills and coins
 - ♦ Shopping

IV. Science

Teacher Resources:

- Science Explorer series (Teachers Editions): *Animals, Astronomy, Chemical Building Blocks, Earth's Changing Surface, Earth's Wates, Electricity and Magnetism, Environmental Science, Human Biology and Health, Inside Earth, Integrated Lab Manual, The Nature of Science and Technology, Weather and Climate*

Read-aloud Resources:

- *Edward Jenner and the Smallpox Vaccine*, Linda Ross
- *Egg to Chick*, Millicent Selsam
- *Eggs of Things*, Maxine W. Kumin and Anne Sexton
- *Living in the Arctic*, Allan Fowler
- *Manfish: A Story of Jacques Cousteau*, Jennifer Berne
- *Marshes & Swamps*, Gail Gibbons
- *My Feet*, Alike
- *My Hands*, Alike
- *Pasteur's Fight Against Microbes*, Beverley Birch and Christian Birmingham
- *Plant Earth/Inside Out*, Gail Gibbons
- *Sea Turtles*, Gail Gibbons and Paula Parker
- *Seeds and More Seeds*, Millicent Selsam
- *Sunken Treasure*, Gail Gibbons
- *Sun Up, Sun Down*, Gail Gibbons
- *The Fantastic Undersea Life of Jacques Cousteau*, Dan Yaccarino
- *The Planets*, Gail Gibbons
- *Whales*, Gail Gibbons
- *Who Eats What?*, Patricia Lauber

Student Resources:

- *ScienceSaurus: A Student Handbook* (yellow softcover), Houghton Mifflin Harcourt

a. Living Things and Their Environments

- ♦ Habitats

Living things live in environments to which they are particularly suited

Specific habitats and what lives there, for example:

Forest – oak trees, squirrels, raccoons, snails, mice

Water – fish, oysters, starfish, algae

The food chain or food web: a way of picturing the relationships between living things

Animals: big animals eat little ones, etc.

Plants: nutrients, water, soil, air, sunlight

- ◆ Oceans and undersea life

Most of the earth is covered with water

Locate oceans: Pacific, Atlantic, Indian, Arctic

Oceans are salt water (vs. fresh water rivers and lakes)

Coast, shore, waves, tides

Currents, the Gulf Stream

Landscape of the ocean floor: mountain peaks and deep valleys

Diversity of ocean life

Dangers to ocean life (e.g. overfishing, pollution, oil spills)

Biography: Jacques Cousteau (marine biologist)

- ◆ Environmental change and habitat destruction: environments are constantly changing, and this can sometimes pose dangers to specific habitats, for example:

Effects of population growth, development, pollution, litter

Floods, fires, major temperature changes (e.g. ice ages)

- ◆ Special classifications of animals

Herbivores, carnivores, omnivores

Extinct animals

b. The Human Body

- ◆ Body Systems: skeletal system, muscular system, digestive system, circulatory system, nervous system

- ◆ Germs, diseases, and preventing illnesses

Taking care of your body: exercise, cleanliness, healthy foods, rest

Vaccinations

- ◆ Biography: Edward Jenner (found a way to stop smallpox)

- ◆ Biography: Louis Pasteur (made milk safer to drink)

c. Matter

- ◆ Basic concept of atoms
- ◆ Names and common examples of three states of matter: solid (e.g. wood, rocks), liquid (e.g. water), gas (e.g. air, steam).
- ◆ Water as an example of changing states of matter of a single substance

d. Properties of Matter: Measurement

- ◆ Units of measurement:
Length: centimeter, inch, foot
Volume: gallon, quart
- ◆ Temperature: degrees Fahrenheit

e. Introduction to Electricity

- ◆ Static electricity
- ◆ Basic parts of simple electric circuits (e.g. batteries, wire, bulb or buzzer, switch)
- ◆ Conductive and nonconductive materials
- ◆ Safety rules for electricity (e.g. never put your finger or anything metallic in an electrical outlet; never touch a switch or electrical appliance when your hands are wet or when you're in the bathtub, etc.)
- ◆ Biography: Thomas Edison

f. Astronomy: Introduction to the Solar System

- ◆ Sun: source of energy, light, heat
- ◆ Moon: phases of the moon
- ◆ The eight planets
- ◆ Stars: constellations, Big Dipper, sun
- ◆ Earth and its place in the solar system
The earth moves around the sun
The earth revolves; one rotation takes one day
Sunrise and sunset

When it is day where you are, it is night for people on the opposite side of the earth

g. The Earth

◆ Geographical features of the earth's surface

The shape of the earth, the horizon

Oceans and continents

North Pole and South Pole, Equator

◆ What's inside the earth

Inside the earth: layers (crust, mantle, core), high temperatures

Volcanoes and geysers

Rocks and minerals

Formation and characteristics of different kinds of rocks:
metamorphic, igneous, sedimentary

Important minerals in the earth (e.g. quartz, gold, coal, iron ore)

V. Visual Arts

Resources:

- Art Resources, Grade 1, Core Knowledge Foundation
- *Children's Book of Art*, DK Eyewitness
- Getting to Know the World's Greatest Artists, series by Mike Venezia:
 - *Claude Monet*
 - *Diego Rivera*
 - *Edgar Degas*
 - *Francisco Goya*
 - *Georgia O'Keeffe*
 - *Grant Wood*
 - *Henri Matisse*
 - *Jacob Lawrence*
 - *James McNeill Whistler*
 - *Leonardo da Vinci*
 - *Paul Cezanne*
 - *Vincent van Gogh*

a. Art from Long Ago

◆ Look at and discuss

Cave paintings

Art of Ancient Egypt: Great Sphinx, mummy cases, Bust of Queen Nefertiti

b. Elements of Art

◆ Color

Know that red, yellow, and blue are commonly referred to as the “primary colors,” and that

Blue + yellow = green

Blue + red = purple

Red + yellow = orange

Observe the use of color in

Tulips in Holland, Claude Monet

Arrangement in Black and Gray (also known as *Whistler’s Mother*), James A. McNeill Whistler

Piñata, Diego Rivera

◆ Line

Identify and use different lines: straight, zigzag, curved, wavy, spiral, thick, thin

Observe how different lines are used in

Parade, Jacob Lawrence

The Swan, Henri Matisse

One of Georgia O’Keefe’s *Shell* paintings

◆ Shape: Recognize basic geometric shapes – square, rectangle, triangle, circle, oval – in nature, man-made objects, and artworks, including

Parade, Jacob Lawrence

Stone City, Iowa, Grant Wood

◆ Texture: Describe qualities of texture (e.g. rough, smooth, bumpy, scratchy, etc.) in

Native American baskets (e.g. pomo basket)

Little Fourteen-Year-Old Dancer (also known as *Dressed Ballet Dancer*), Edgar Degas

Young Hare, Albrecht Dürer

c. Kinds of Pictures: Portrait and Still Life

- ◆ Recognize as a portrait or self-portrait:

Mona Lisa, Leonardo da Vinci

Don Manuel Osorio Manrique de Zuñiga, Francisco Goya

Self-Portrait (1889), Vincent van Gogh

- ◆ Recognize as a still life:

Irises, Vincent van Gogh

Studies with fruit by Paul Cézanne, such as *Apples and Oranges*

- ◆ Recognize as a mural (a painting on a wall):

The History of Medicine in Mexico, Diego Rivera

VI. Music

Resources:

- Core Knowledge Music Collection, Grades 1 and 2, Core Knowledge Foundation
- Text Resources, Grade 1, Core Knowledge Foundation
- Getting to Know the World's Greatest Composers, series by Mike Venezia:
 - o *Wolfgang Amadeus Mozart*
 - o *Peter Ilich Tchaikovsky*

a. Elements of Music:

- ◆ Through participation, become familiar with basic elements of music (rhythm, melody, harmony, form, timbre, etc.).
Recognize a steady beat, accents, and the downbeat; play a steady beat; recognize accents.
Move responsively to music.
Recognize short and long sounds.
Discriminate between fast and slow.
Discriminate between obvious differences in pitch: high and low.
Discriminate between loud and soft.
Understand that melody can move up and down.
Hum the melody while listening to music.
Echo short rhythms and melodic patterns.
Play simple rhythms and melodic patterns.
Recognize like and unlike phrases.
Recognize that music has timbre or tone color.
Sing unaccompanied, accompanied, and in unison.
- ◆ Understanding the following notation:
Whole note, half note, quarter note

b. Listening and Understanding

- ◆ Musical terms and concepts:
Composers: know that a composer is someone who writes music; become familiar with Wolfgang Amadeus Mozart as a composer who wrote what is known as classical music, and listen to the

Allegro (first movement) from *A Little Night Music* (*Eine kleine Nachtmusik*).

Orchestra: become familiar with the families of instruments in the orchestra (strings, brass, woodwinds, percussion); know that the leader of the orchestra is called the conductor; listen to Sergei Prokofiev's *Peter and the Wolf*.

◆ Music can tell a story

Opera: understand that opera combines music, singing, and acting; listen to selections from Humperdinck's *Hansel and Gretel* ("Brother, Come Dance with Me," "I Am the Little Sandman," and "Children's Prayer").

Instrumental Music: listen to Paul Dukas, *The Sorcerer's Apprentice*.

Ballet: understand that ballet combines music and movement, often to tell a story; listen to Tchaikovsky's *Nutcracker Suite*.

◆ American musical traditions: Jazz

Understand that jazz is a kind of music that developed in America, with African and African American roots, and that jazz musicians improvise.

Recognize Louis Armstrong as a great early jazz musician.

c. Songs

America the Beautiful

Billy Boy

Dry Bones

For He's a Jolly Good Fellow

Frère Jacques

La Cucaracha

Make New Friends

Michael, Row the Boat Ashore

Oh, Dear, What Can the Matter Be?

Oh, John the Rabbit

Oh! Susanna
On Top of Old Smokey
She'll Be Comin' 'Round the Mountain
Skip to My Lou
Take Me Out to the Ball Game
There's a Hole in the Bucket
When the Saints Go Marching In
Yankee Doodle

Sixth Grade

I. Phonics and Literacy

Resources:

(For first- and second-year schools)

- *Writing and Spelling Road to Reading and Thinking*, Level I Teacher's Edition, Riggs Institute
- *Writing and Spelling Road to Reading and Thinking*, Level II Teacher's Edition, Riggs Institute
- *Writing and Spelling Road to Reading and Thinking*, Level III Spelling List, Riggs Institute
- Box of Phonogram cards, Riggs Institute
- *The ABC's and All Their Tricks*, Margaret Bishop
- "Older Student Adaptation: Instructions for 3-6th Grade Teachers," Access Literacy (pamphlet)
- *My English Orthography Notebook*, Access Literacy
- Standard Test Lessons in Reading: Books D-F, McCall-Crabbs
- Standard Test Lessons in Reading: Teacher's Manual, McCall-Crabbs
- Standard Test Lessons in Reading: Answer Sheets, McCall-Crabbs
- *English from the Roots Up*, Volume I, Joegil Lundquist
- *English from the Roots Up*, Volume II, Joegil Lundquist

- a. New Schools: In the first year of a school, 6th grade teachers should spend the first month covering the material in the "Older Student Adaptation" pamphlet, which draws from various lessons in the Level I manual. This will include teaching the phonograms, remediating student handwriting or teaching cursive, and working on more basic spelling lists. After this month, teachers should test students according to the instructions on page 20 of the "Older Student Adaptation" pamphlet. Depending on the class average, the teacher will either review spelling lists as described on page 20, or move forward from at the pace of one spelling-vocabulary list every two weeks, through the entire year or until the students have tested beyond the Level III vocabulary. Students should make daily entries in their own copy of *My English Orthography Notebook* such that the notebook is filled, or nearly filled, by the end of the school year.
- b. Second-Year Schools: In the school's second year, most sixth-grade students will be well acquainted with the Level I, II, and III programs from the previous grade, but they may not be through the Level III spelling and

vocabulary words. To begin the new school year, teachers should assess the class ability level using the assessments and related instructions on pages 29-42 of the Level I manual. Teachers should grade each test by counting the number of correctly spelled words until a student misses five words in a row. The class average should then be compared to the equivalency table on page 33, and this score will indicate the spelling list with which the class should begin. From this starting point, teachers should proceed at a pace of one spelling-vocabulary list every two weeks through the entire year. When the class finishes the Level III manual—or if the class orthography assessment scores are above the Level III manual—then teachers should choose approximately 10 words per week to explicitly instruct for spelling and as vocabulary words. The vocabulary can be chosen from the curriculum alongside teaching Latin and Greek roots from *English from the Roots Up*.

- c. Established Schools: In established schools, students should have already finished all spelling and vocabulary words in the Level I, II, and III manuals, as well as the Greek and Latin roots in the two volumes of *English from the Roots Up*. If necessary, teachers can begin the year by reviewing spelling lists from the Level III manual and Greek and Latin roots from *English from the Roots Up*. Teachers should choose approximately 300 vocabulary words based upon words from the literature, history, and science curriculum to be explicitly taught for spelling and usage. Students should be given regular practice opportunities for spelling and usage of the new vocabulary. Then vocabulary can be tested weekly or bi-weekly to assess mastery.
- d. As necessary, use the McCall-Crabbs Standard Test Lessons in Reading to assess and build student reading comprehension.

II. Grammar

Resources:

For First-Year Schools:

- *Well-Ordered Language*, Level 3A, teacher and student editions, Peters and Coupland
- *Well-Ordered Language*, Level 3B, teacher and student editions, Peters and Coupland

For Other Schools:

- *Well-Ordered Language*, Level 4A, teacher and student editions, Peters and Coupland (available to pilot in 2018)
- *Well-Ordered Language*, Level 4B, teacher and student editions, Peters and Coupland (available to pilot in 2018)

a. Grammar

Level 4A

- ◆ Four Kinds of Sentences & Principal Elements
- ◆ Adverbs and Adjectives
- ◆ Predicate Verb, Predicate Nominative, Predicate Adjective with Sensory Linking verbs
- ◆ Prepositional Phrases
- ◆ Indirect Objects
- ◆ Interrogative pronouns & Interrogative Adverbs
- ◆ Relative Clauses
- ◆ Reflexive, Intensive, & Indefinite pronouns
- ◆ Adverbial clauses

Level 4B

- ◆ Verbals - Participles
- ◆ Participle phrases
- ◆ Verbals - Gerunds
- ◆ Gerund phrases
- ◆ Verbals - Infinitives
- ◆ Infinitives phrases

- ◆ Appositives
- ◆ Noun clauses

a. Composition

- ◆ Informative Essay: Student writes introductory paragraph and 3 body paragraphs. Conclusion paragraph optional, depending on student ability and necessity for one.
- ◆ Narrative Essay: Student writes introductory paragraph and 3 body paragraphs. Conclusion paragraph optional, depending on student ability and necessity for one.
- ◆ Persuasive Essay: Student writes introductory paragraph and 3 body paragraphs. Conclusion paragraph optional, depending on student ability and necessity for one.

III. Literature

Teacher Resources:

- *What Your Sixth Grader Needs to Know*, Core Knowledge Foundation
- Macbeth DVD, Royal Shakespeare Company 1979 Production
- *Metamorphoses*, Ovid (Mendelbaum Translation)
- *Classic Myths to Read Aloud*, William F. Russell

Student Resources:

- *Realms of Gold*, Volume 1, Core Knowledge Foundation
- *Children's Homer*, Padraic Colum
- *Macbeth*, William Shakespeare
- *Prince and the Pauper*, Mark Twain
- *The Count of Monte Cristo*, Alexandre Dumas
- *The Scarlet Pimpernel*, Baroness Orczy

a. Poetry

- ◆ Poems:

Realms of Gold, Volume 1

All the world's a stage (from *As You Like It*), William Shakespeare

Apostrophe to the Ocean (from *Childe Harold's Pilgrimage*, Canto 4, Nos. 178-184), George Gordon Byron

Wandered Lonely as a Cloud, William Wordsworth

If, Rudyard Kipling

Mother to Son, Langston Hughes
Lift Ev'ry Voice and Sing, James Weldon Johnson
A narrow fellow in the grass, Emily Dickinson
A Psalm of Life, Henry Wadsworth Longfellow
The Raven, Edgar Allan Poe
A Song of Greatness, a Chippewa song, trans. Mary Austin
Stopping by Woods on a Snowy Evening, Robert Frost
Sympathy, Paul Laurence Dunbar
There is no frigate like a book, Emily Dickinson
The Walloping Window-blind, Charles E. Carry
Woman Work, Maya Angelou

- ◆ Terms: meter, iamb, couplet, rhyme scheme, free verse

b. Fiction

- ◆ Novels

The Prince and the Pauper, Mark Twain
The Scarlet Pimpernel, Baroness Orczy
The Count of Monte Cristo, Alexandre Dumas

- ◆ Stories

Children's Homer, Padraic Colum

- ◆ Drama

Macbeth, William Shakespeare

- ◆ Classical Mythology

Ovid's *Metamorphoses*

Apollo and Daphne (Book I)

Narcissus and Echo (Book III)

Classic Myths to Read Aloud

Pygmalion and Galatea

Orpheus and Eurydice

- ◆ Literary Terms:

Epic

Literal and figurative language (review from grade 5): imagery,
metaphor, simile, symbol, personification

c. Sayings and Phrases:

What Your Sixth Grader Needs to Know

All for one and one for all.

All's well that ends well.

Bee in your bonnet

The best-laid plans of mice and men oft go awry.

A bird in the hand is worth two in the bush.

Bite the dust

Catch-as-catch-can

Don't cut off your nose to spite your face.

Don't lock the stable door after the horse is stolen.

Don't look a gift horse in the mouth.

Eat humble pie

A fool and his money are soon parted.

A friend in need is a friend indeed.

Give the devil his due.

Good fences make good neighbors.

He who hesitates is lost.

He who laughs last laughs best.

Hitch your wagon to a star.

If wishes were horses, beggars would ride.

The leopard doesn't change his spots.

Little strokes fell great oaks.

Money is the root of all evil.

Necessity is the mother of invention.

It's never over till it's over.

Nose out of joint

Nothing will come of nothing.

Once bitten, twice shy.

On tenterhooks

Pot calling the kettle black
Procrastination is the thief of time.
The proof of the pudding is in the eating.
RIP
The road to hell is paved with good intentions.
Rome wasn't built in a day.
Rule of thumb
A stitch in time saves nine.
Strike while the iron is hot.
Tempest in a teapot
Tenderfoot
There's more than one way to skin a cat.
Touché!
Truth is stranger than fiction.

IV. History and Geography

Resources:

- *History & Geography*, 6th grade text, Core Knowledge Foundation
- *The Story of the World, Volume 1: Ancient Times*, Susan Wise Bauer
- *The Story of the World, Volume 2: The Middle Ages*, Susan Wise Bauer
- *The Story of the World, Volume 3: Early Modern Times*, Susan Wise Bauer
- DK Eyewitness Books (useful as a visual aid, especially because Bauer volumes and CK text contain few pictures or maps)
- *The Golden Days of Greece*, Olivia Coolidge

Fall Semester –

a. Geography

- ◆ Geographic Tools: Map keys, latitude and longitude, coordinates, degrees, relief maps
- ◆ The Globe: Tropic of Cancer, Tropic of Capricorn, climate zones, time zones, Arctic Circle, Antarctic Circle
- ◆ Great Deserts:
Definition of desert; hot vs. cold deserts
Major deserts: Sahara and Kalahari in Africa; Australia (mostly desert continent); Gobi Desert and Arabian Peninsula in

Asia; Mojave, Chihuahuan, and Sonoran in North America;
Atacama in South America

b. Lasting Ideas from Ancient Civilizations: Judaism and Christianity

◆ Basic ideas in common

The nature of God and humanity

Hebrew Bible and Old Testament of Christian Bible

◆ Judaism: central ideas and moral teachings

Torah, monotheism

The idea of a “covenant” between God and man

Concepts of law, justice, and social responsibility

Important Stories: Creation, the Fall, Tower of Babel, Calling of Abraham, Abraham and Isaac, Exodus, 10 Commandments, Battle of Jericho and the Promised Land, Anointing of David, David and Goliath, Solomon’s Request for Wisdom, Elijah and the Priests of Baal

◆ Christianity: central ideas and moral teachings

New Testament

The Sermon on the Mount and the two “great commandments”
(Matthew 22: 37-40)

Important Stories: Nativity, John the Baptist, Baptism of Jesus, Walking on Water, Prodigal Son, Raising of Lazarus, Triumphal Entry, Lord’s Supper, Death and Resurrection, Pentecost

◆ Geography of the Middle East

Birthplace of major world religions: Judaism, Christianity, Islam

Geographic features: Anatolian Peninsula, Arabian Peninsula,
Mesopotamia, Tigris and Euphrates Rivers, Atlas Mountains,
Taurus Mountains, Mediterranean Sea, Red Sea, Black Sea,
Arabian Sea, Persian Gulf

The “silk road”

Climate and terrain: vast deserts (Sahara, Arabian)

c. Lasting Ideas from Ancient Civilizations: Ancient Greece

- ◆ The Greek polis (city-state) and patriotism
- ◆ Beginnings of democratic government: roots of modern democracy in Athenian democracy, the Assembly, suffrage, majority vote
- ◆ The “classical” ideal of human life and works
The ideal of the well-rounded individual and worthy citizen
Pericles and the “Golden Age”
Architecture: the Parthenon
Games: the Olympics
- ◆ Greek wars: victory and hubris, defeat and shame
Persian Wars: Marathon, Thermopylae, Salamis
The Peloponnesian War
- ◆ Socrates and Plato
Socrates was Plato’s teacher; we know him through Plato’s writings
For Socrates, wisdom is only possible through examination and recognition of one’s own ignorance
The Trial of Socrates
- ◆ Plato and Aristotle
Plato was Aristotle’s teacher
They agreed that reason and philosophy should rule our lives, not emotion and spiritedness
They disagreed about where true “reality” is: Plato says it is beyond physical things in ideas (i.e., the forms; cf. the “allegory of the cave” in *The Republic*); Aristotle says reality is only in physical things
- ◆ Alexander the Great and the spread of Hellenistic culture

d. Lasting Ideas from Ancient Civilizations: Ancient Rome

- ◆ The Roman Republic
Builds upon Greek ideals
Class and status: patricians and plebeians, slaves

Roman government: consuls, tribunes, and senators

- ◆ Virgil, *The Aeneid*: epic on the legendary origins of Rome
- ◆ The Punic Wars
- ◆ Julius Caesar
- ◆ Augustus Caesar

Pax Romana

Roman law and the administration of a vast, diverse empire

- ◆ Christianity under the Roman Empire

Jesus' instruction to "Render unto Caesar" (Matthew 22:21)

Roman persecution of Christians

Constantine: first Christian Roman emperor

- ◆ The "decline and fall" of the Roman Empire

Causes debated by historians for many hundreds of years (outer forces such as shrinking trade, attacks and invasions; inner forces such as disease, jobless masses, taxes, corruption and violence, rival religions and ethnic groups, weak emperors, etc.)

Rome's "decline and fall" perceived as an object lesson for later generations and societies

e. The Enlightenment

- ◆ Faith in science and human reason, as exemplified by Isaac Newton and the laws of nature
Descartes: "cogito ergo sum"

- ◆ Two ideas of human nature: Thomas Hobbes and John Locke
Hobbes: the need for a strong governing authority as a check on "the condition of man...[which] is a condition of war of all against all"

Locke: the idea of man as a "tabula rasa" and the optimistic belief in education; argues against doctrine of divine right of kings and for government by consent of the governed

- ◆ Influence of the Enlightenment on the beginnings of the United States

Thomas Jefferson: the idea of “natural rights” in the Declaration of Independence

Montesquieu and the idea of separation of powers in government

f. The French Revolution

- ◆ The influence of Enlightenment ideas and of the English Revolution on revolutionary movement in America and France
- ◆ The American Revolution: the French alliance and its effect on both sides

- ◆ *L’Ancien Régime* in France

The social classes: the three Estates

Louis XIV, the “Sun King”: Versailles

Louis XV: “Après moi, le déluge”

Louis XVI: the end of the Old Regime

Marie Antoinette: the famous legend of “Let them eat cake”

- ◆ 1789: from the Three Estates to the National Assembly

July 14, Bastille Day

Declaration of the Rights of Man

October 5, Women’s March on Versailles

“Liberty, Equality, Fraternity”

- ◆ Louis XVI and Marie Antoinette to the guillotine
- ◆ Reign of Terror: Robespierre, the Jacobins, and the “Committee of Public Safety”
- ◆ Revolutionary arts and the new classicism
- ◆ Napoleon Bonaparte and the First French Empire
 - Napoleon as military genius
 - Crowned Emperor Napoleon I: reinventing the Roman Empire
 - The invasion of Russia
 - Exile to Elba
 - Wellington and Waterloo

g. Romanticism

- ◆ Beginning in early nineteenth century Europe, Romanticism refers to the cultural movement characterized by:
 - The rejection of classicism and classical values
 - An emphasis on emotion and imagination instead of reason
 - An emphasis on nature and the private self instead of society and man in society
- ◆ The influence of Jean-Jacques Rousseau's celebration of man in a state of nature (as opposed to man in society): "Man is born free and everywhere he is in chains"; the idea of the "noble savage"
- ◆ Romanticism in literature, the visual arts, and music

Spring Semester –

h. The Industrial Revolution

- ◆ Beginnings in Great Britain
 - Revolution in transportation: canals, railroads, new highways
 - Steam power: James Watt
- ◆ Revolution in textiles: Eli Whitney and the cotton gin, factory production
- ◆ Iron and steel mills
- ◆ The early factory system
 - Families move from farm villages to factory towns
 - Unsafe, oppressive working conditions in mills and mines
 - Women and child laborers
 - Low wages, poverty, slums, disease in factory towns
 - Violent resistance: Luddites

i. Capitalism and Socialism

- ◆ Capitalism
 - Adam Smith and the idea of laissez faire vs. government intervention in economic and social matters
 - Law of supply and demand

Growing gaps between social classes: Disraeli's image of "two nations" (the rich and the poor)

♦ Socialism

An idea intended to offer an alternative to Capitalism; called for the public ownership of the means of production; intended to achieve a more equal distribution of wealth.

Marxism: the Communist form of Socialism

Karl Marx and Friedrich Engels, The Communist Manifesto:
"Workers of the world, unite!"

Class struggle: bourgeoisie and proletariat

Communists, in contrast to some other Socialists, opposed all forms of private property

j. Latin American Independence Movements

- ♦ The name "Latin America" comes from the Latin origin of the languages now most widely spoken (Spanish and Portuguese)
- ♦ Haitian revolution: Toussaint L'Ouverture, Abolition of West Indian slavery
- ♦ Mexican revolutions: Miguel Hidalgo, José María Morelos, Santa Anna vs. the United States, Benito Juárez, Pancho Villa, Emiliano Zapata
- ♦ Liberators: Simon Bolivar, José de San Martín, Bernardo O'Higgins
- ♦ New nations in Central America: Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua
- ♦ Brazilian independence from Portugal
- ♦ Geography of Latin America
 - Mexico: Yucatan Peninsula, Mexico City
 - Panama: isthmus, Panama Canal
 - Central and South America: locate major cities and countries, including Caracas, Venezuela; Bogota, Colombia; Quito, Ecuador; Lima, Peru; Santiago, Chile; La Paz, Bolivia
 - Andes Mountains

Brazil: largest country in South America, rain forests, Rio de Janeiro, Amazon River

Argentina: Rio de la Plata, Buenos Aires, Pampas

k. Nineteenth-Century Immigration in the United States

- ◆ Waves of new immigrants from about 1830 forward
Great migrations from Ireland (potato famine) and Germany
From about 1880 on, many immigrants arrive from southern and eastern Europe
Immigrants from Asian countries, especially China
Ellis Island, “The New Colossus” (poem on the Statue of Liberty)
Large populations of immigrants settle in major cities, including New York, Chicago, Philadelphia, Detroit, Cleveland, Boston, San Francisco
- ◆ Tension between ideals and realities
The metaphor of America as a “melting pot”
America perceived as “land of opportunity” vs. resistance, discrimination, and “nativism”
Resistance to Catholics and Jews
Chinese Exclusion Act

l. Industrialization and Urbanization in the United States

- ◆ The post-Civil War industrial boom
The “Gilded Age”
The growing gap between social classes
Horatio Alger and the “rags to riches” story
Growth of industrial cities: Chicago, Cleveland, Pittsburgh
Many thousands of African-Americans move north
Urban corruption, “machine” politics: “Boss” Tweed in New York City, Tammany Hall
- ◆ The condition of labor
Factory conditions: “sweat shops,” long work hours, low wages, women and child laborers

Unions: American Federation of Labor; Samuel Gompers
Strikes and retaliation: Haymarket Square; Homestead,
Pennsylvania
Labor Day

- ◆ The growing influence of big business: industrialists and capitalists
“Captains of industry” and “robber barons”: Andrew Carnegie, J.P.
Morgan, Cornelius Vanderbilt
John D. Rockefeller and the Standard Oil Company as an example
of the growing power of monopolies and trusts
Capitalists as philanthropists: funding museums, libraries, etc.
- ◆ “Free enterprise” vs. government regulation of business: Interstate
Commerce Act and Sherman Antitrust Act attempt to limit power of
monopolies

m. Late 19th and Early 20th-Century Reform Movements in the US

- ◆ Populism: Discontent and unrest among farmers; gold standard vs.
free silver; William Jennings Bryan
- ◆ The Progressive Era:
“Muckraking”: Ida Tarbell on the Standard Oil Company; Upton
Sinclair, *The Jungle*, on the meat packing industry
Jane Addams: settlement houses
Jacob Riis, *How the Other Half Lives*: tenements and ghettos in the
modern city
President Theodore Roosevelt: conservation and trust-busting
- ◆ Reform for African-Americans
Ida B. Wells: campaign against lynching
Booker T. Washington: Tuskegee Institute, Atlanta Exposition
Address, “Cast down your bucket where you are”
W.E.B. DuBois: founding of NAACP, “The problem of the twentieth
century is the problem of the color line,” *The Souls of Black
Folk*

- ♦ Women's suffrage: Susan B. Anthony, Nineteenth Amendment (1920)

V. Mathematics

Resources:

- Primary Mathematics Textbooks 6A & 6B, US Edition, Singapore Mathematics
- Primary Mathematics Workbooks 6A & 6B, US Edition, Singapore Mathematics
- Primary Math Teacher's Guides 6A & 6B, US Edition, Singapore Mathematics

Fall Semester –

- a. Algebra
 - ♦ Algebraic expressions
- b. Solid Figures
 - ♦ Drawing solid figures
 - ♦ Nets
- c. Ratio
 - ♦ Ratio and fraction
 - ♦ Ratio and proportion
 - ♦ Changing ratios
- d. Percentage
 - ♦ Part of a whole as a percentage
 - ♦ One quantity as a percentage of another
 - ♦ Solving percentage problems by unitary method
- e. Speed
 - ♦ Speed and average speed

Spring Semester –

- f. Fractions
 - ♦ Division
 - ♦ Order of operations
 - ♦ Word problems
- g. Circles
 - ♦ Radius and diameter

- ♦ Circumference
- ♦ Area
- h. Graphs: Pie Charts
- i. Volume: Solving Problems
- j. Triangles and 4-sided Figures: Finding Unknown Angles
- k. More Challenging Word Problems
 - ♦ Whole numbers and decimals
 - ♦ Fractions
 - ♦ Ratio
 - ♦ Percentage
 - ♦ Speed

VI. Science

Teacher Resources:

- *Alexander Fleming*, Salvatore Tocci
- *Alfred Wegener: Pioneer of Plate Tectonics*, Greg Young
- *Isaac Newton: The Scientist Who Changed Everything*, Philip Steele
- *Isaac Newton*, Margaret J. Anderson
- *Lewis Latimer*, Winifred Latimer Norman and Lily Patterson
- *Marie Curie*, Vicki Cobb
- Science Explorer series (Teacher's Editions): *Astronomy*, *Chemical Building Blocks*, *Human Biology and Health*, *Integrated Lab Manual*, *The Nature of Science and Technology*
- *Something Out of Nothing: Marie Curie and Radium*, Carla Killough McClafferty

Student Resources:

- Science Explorer series (Student and Teacher's Editions): *Earth's Waters*, *Inside Earth*, *Motion, Forces, and Energy*

a. Plate Tectonics

- ♦ The surface of the earth

The surface of the earth is in constant movement

The present features of earth come from its ongoing history. After the sun was formed, matter cooled creating the planets. The continents were once joined (Pangaea).

- ♦ Layered structure of the earth

Crust: surface layer of mainly basalt or granite, 5 to 15 miles thick

Mantle: 1,800 miles thick, rock of intermediate density, moves very slowly

Outer core: liquid iron and nickel

Inner core: solid iron and nickel, 800 miles thick, about 7,000 degrees C

- ◆ Crust movements

The surface of earth is made up of rigid plates that are in constant motion

Plates move because molten rock rises and falls under the crust causing slowly flowing currents under the plates

Plates move at speeds ranging from 1 to 4 inches per year

Earthquakes usually occur where stress has been built up by plates moving in opposite directions against each other. Earthquakes cause waves (vibrations) which have:

Focus, the point below the surface where the quake begins

Epicenter, the point on the surface above the focus

Severity of ground shaking is measured on the Richter scale; each unit on the scale represents a tenfold severity increase

- ◆ Volcanoes usually occur where plates are pulling apart or coming together, but some occur at holes (hot spots) in the crust away from plate boundaries. As plates move over these hot spots, they cause chains of volcanoes and island chains like the Hawaiian Islands.

- ◆ Evidence for long-term movement of plates includes fit of continents and matches of rock types, fossils, and structures; ocean floor age and topography; ancient climate zones; locations of earthquakes, volcanoes, and mountain ranges; magnetic directions in ancient rocks.

- ◆ Biography: Alfred Wegener (known for theory that the continents were once joined together and split apart to form the continents; now known as “the continental drift.”)

b. Oceans

- ◆ Surface

The world ocean covers most of the earth's surface (71 percent)

Three major subdivisions of the world ocean: Atlantic, Pacific, and Indian Oceans

Islands consist of high parts of submerged continents, volcanic peaks, coral atolls

- ◆ Subsurface land features

Continental shelf, continental slope, continental rise, abyssal plains

Mid-ocean ridges and trenches, plate tectonics: Mid-Atlantic Ridge, Mariana Trench

- ◆ Ocean bottom: average depth of sediment .3 mile, consists of rock particles and organic remains

- ◆ Composition of seawater: dilute solution of salts which come from weathering and erosion of continental rocks. Sodium chloride is the main salt.

- ◆ Currents, tides, and waves

Surface currents: large circular streams kept in motion by prevailing winds and rotation of the earth; Gulf Stream (North Atlantic), Kuroshio (North Pacific)

Subsurface currents are caused by upwelling from prevailing offshore winds (Peru, Chile) and density differences (Antarctica); the upwelling pushes up nutrients from the ocean floor.

Tides are caused by gravitational forces of the sun and moon; there are two tides daily.

Waves are caused by wind on the ocean's surface.

Water molecules tend to move up and down in place and not move with the wave.

Crest and trough, wave height and wavelength, shoreline friction

Tsunamis: destructive, fast-moving large waves caused mainly by earthquakes

c. Marine life

- ◆ Life zones are determined by the depth to which light can penetrate making photosynthesis possible, and by the availability of nutrients

The bottom (benthic zone) extends from sunlit continental shelf to dark sparsely populated depths. Shallow lighted water extending over continental shelf contains 90% of marine species.

Pelagic zone: water in open oceans.

- ◆ Classification of marine life
 - Bottom-living (benthic) such as kelp and mollusks
 - Free-swimming (nekton) such as fish and whales
 - Small drifting bacteria, protists, plants and animals (plankton), which are the dominant life and food source in the ocean
- ◆ The basis for most marine life is phytoplankton (plant-plankton), which carry on photosynthesis near surface; contrast zooplankton.
- ◆ Most deep-water life depends on rain of organic matter from above. The densest concentration of marine life is found in surface waters, such as those off Chile, where nutrient-rich water wells up to the bright surface.

d. Astronomy: Gravity, Stars, and Galaxies

- ◆ Gravity: an attractive force between objects
 - Newton's law of universal gravitation: between any two objects in the universe there is an attractive force, gravity, which grows greater as the objects move closer to each other.
 - How gravity keeps the planets in orbit
- ◆ Stars
 - The sun is a star.
 - Kinds of stars (by size): giants, dwarfs, pulsars

Supernova; black holes

Apparent movement of stars caused by rotation of the earth

Constellations: visual groupings of stars, for example, Big Dipper, Orion

Astronomical distance measured in light years

- ◆ Galaxies

The Milky Way is our galaxy; the Andromeda Galaxy is closest to the Milky Way.

Quasars are the most distant visible objects (because the brightest).

- ◆ Biography: Isaac Newton (known for advances in physics; outlined laws of gravity and invented the telescope)

e. Energy and Heat

- ◆ Energy

Six forms of energy: mechanical, heat, electrical, wave, chemical, nuclear

The many forms of energy are interchangeable, e.g., gasoline in a car, windmills, hydroelectric plants

Sources of energy: e.g. heat (coal, natural gas, solar, atomic, geothermal, and thermonuclear), mechanical motion (falling water, wind, etc.)

Fossil fuels: a finite resource

Carbon, coal, oil, natural gas

Environmental impact of fossil fuels: carbon dioxide and global warming theory, greenhouse effect, oil spills, acid rain

Nuclear energy

Uranium, fission, nuclear reactor; radioactive waste

Nuclear power plants: safety and accidents (e.g. Three Mile Island, Chernobyl)

- ◆ Heat

Heat and Temperature: how vigorously atoms are moving and colliding

Three ways heat can be transferred: conduction, convection, radiation

Direction of heat transfer

- ◆ Biography: Marie Curie (advances in science of radioactivity; discovered the elements polonium and radium)

f. Physical Change: Energy Transfer

- ◆ States of matter (solid, liquid, gas) in terms of molecular motion

In gases, loosely packed atoms and molecules move independently and collide often. Volume and shape change readily.

In liquids, atoms and molecules are more loosely packed than in solids and can move past each other. Liquids change shape readily but resist change in volume.

In solids, atoms and molecules are more tightly packed and can only vibrate. Solids resist change in shape and temperature.

- ◆ Most substances are solid at low temperatures, liquid at medium temperatures, and gaseous at high temperatures.
- ◆ A change of phase is a physical change (no new substance is produced).
- ◆ Matter can be made to change phases by adding or removing energy.
- ◆ Expansion and contraction
Expansion is adding heat energy to a substance, which causes the molecules to move more quickly and the substance to expand.
Contraction is when a substance loses heat energy, the molecules slow down, and the substance contracts.
Water is a special case: water expands when it changes from a liquid to a solid.
- ◆ Changing phases: condensation, freezing, melting; boiling
Different amounts of energy are required to change the phase of different substances.

Each substance has its own melting and boiling point.

The freezing point and boiling point of water (in Celsius and Fahrenheit)

- ◆ Distillation: separation of mixtures of liquids with different boiling points.
- ◆ Biography: Lewis Howard Latimer (worked with Alexander Graham Bell on drawings of Bell's invention, the telephone; improved Thomas Edison's light bulb)
- ◆ Biography: James Prescott Joule (physicist for which the SI unit for energy is named)

g. The Human Body

- ◆ The circulatory and lymphatic systems
Briefly review from grade 4: circulatory system
Lymph, lymph nodes, white cells, tonsils
Blood pressure, hardening and clogging of arteries
- ◆ The immune system fights infections from bacteria, viruses, fungi.
White cells, antibodies, antigens
Vaccines, communicable and non-communicable diseases, epidemics
Bacterial diseases: tetanus, typhoid, tuberculosis; antibiotics like penicillin, discovered by Alexander Fleming
Viral diseases: common cold, chicken pox, mononucleosis, rabies, polio, AIDS
- ◆ Biography: Alexander Fleming (biologists who discovered penicillin)

VII. Art

Resources:

- *Eyewitness Companions: Art*, Robert Cumming (DK Eyewitness)
- *Eyewitness: Renaissance*, Alison Cole (DK Eyewitness)
- Various trade books with large prints of the art listed in the CK Sequence below.

- a. Classical Art: The Art of Ancient Greece and Rome
 - ◆ Observe characteristics considered “classic” – emphasis on balance and proportion, idealization of human form in
The Parthenon and the *Pantheon*
The Discus Thrower and *Apollo Belvedere*
- b. Gothic Art (ca. 12-15th centuries)
 - ◆ Briefly review the religious inspiration and characteristic features of Gothic cathedrals.
- c. The Renaissance (ca. 1350-1600)
 - ◆ Briefly review main features of Renaissance art (revival of classical subjects and techniques, emphasis on humanity, discovery of perspective) and examine representative works, including Raphael, *The School of Athens*
Michelangelo, *David* (review from grade 5)
- d. Baroque (ca. 17th century)
 - ◆ Note the dramatic use of light and shade, turbulent compositions, and vivid emotional expression in
El Greco, *View of Toledo* (also known as *Toledo in a Storm*)
Rembrandt: a self-portrait, such as *Self-Portrait, 1659*
- e. Rococo (ca. mid- to late-17th century)
 - ◆ Note the decorative and “pretty” nature of Rococo art, the use of soft pastel colors, and the refined, sentimental, or playful subjects in Jean-Honoré Fragonard, *The Swing*
- f. Neoclassical (ca. late 18th-early 19th century)
 - ◆ Note as characteristic of Neoclassical art the reaction against Baroque and Rococo, the revival of classical forms and subjects, belief in high moral purpose of art, and balanced, clearly articulated forms in Jacques Louis David, *Oath of the Horatii*
- g. Romantic (ca. late 18th- 19th century)

- ◆ Note how Romantic art is in part a reaction against Neoclassicism, with a bold, expressive, emotional style, and a characteristic interest in the exotic or in powerful forces in nature, in
Francisco Goya, *The Bullfight*
Eugene Delacroix, *Liberty Leading the People*
Caspar David Friedrich, *The Chalk Cliffs on Rugen*

h. Realism (ca. mid- to late-19th century)

- ◆ Note the Realist's characteristic belief that art should represent ordinary people and activities, that art does not have to be uplifting, edifying, or beautiful, in
Jean Millet, *The Gleaners*
Gustave Courbet, *The Stone Breakers*
- ◆ Become familiar with examples of American realism, including
Winslow Homer, *Northeaster*
Thomas Eakins, *The Gross Clinic*
Henry O. Tanner, *The Banjo Lesson*

VIII. Music

Resources:

- Core Knowledge Music Collection, Grade 6, Core Knowledge Foundation

a. Elements of Music:

- ◆ Review as necessary from earlier grades:
The orchestra and families of instruments (strings, wind, brass, percussion); keyboard instruments
Vocal ranges: soprano, mezzo-soprano, alto; tenor, baritone, bass
- ◆ Recognize frequently used Italian terms:
grave (very, very slow)
largo (very slow)
adagio (slow)
andante (moderate)
moderato (medium)

allegro (fast)

presto (very fast)

prestissimo (as fast as you can go)

ritardando and *accelerando* (gradually slowing down and getting faster)

crescendo and *decrescendo* (gradually increasing and decreasing volume)

legato (smoothly flowing progression of notes), *staccato* (crisp, distinct notes)

- ◆ Recognize introduction, interlude, and coda in musical selections.
- ◆ Recognize theme and variations.
- ◆ Identify chords [such as I (tonic), IV (subdominant), V (dominant); V7]; major and minor chords; chord changes; intervals (third, fourth, fifth).
- ◆ Understand what an octave is.
- ◆ Understanding the following notation and terms:
 - names of lines and spaces in the treble clef; middle C
 - treble clef, bass clef, staff, bar line, double bar line, measure, repeat signs
 - whole note, half note, quarter note, eighth note
 - whole rest, half rest, quarter rest, eighth rest
 - grouped sixteenth notes
 - tied notes and dotted notes
 - sharps, flats, naturals
 - Da capo* [D.C.] *al fine*
 - meter signature 4/4 or common time 2/4, 3/4, 6/8
 - soft ***pp p mp*** loud ***mf f ff***

b. Baroque (ca. 1600-1750)

- ◆ Counterpoint, fugue, oratorio

- ◆ Johann Sebastian Bach: selections from *Brandenburg Concertos*, selections from *The Well Tempered Clavier*, selections from the *Cantatas* such as *BWV 80*, *BWV 140*, or *BWV 147*
 - ◆ George Frederick Handel: selections from *Water Music*, “Hallelujah Chorus” from *The Messiah*
- c. Classical (ca. 1750-1825)
- ◆ The classical symphony (typically in four movements)
Wolfgang Amadeus Mozart, *Symphony No. 40*
 - ◆ The classical concerto: soloist, cadenza
Wolfgang Amadeus Mozart, *Piano Concerto No. 21*
 - ◆ Chamber music: string quartet, sonata
Franz Joseph Haydn, *String Quartet Opus 76 No. 3, “Emperor”*
Ludwig van Beethoven, *Piano Sonata No. 14 (“Moonlight” Sonata)*
- d. Romantic (ca. 1800-1900)
- ◆ Beethoven as transitional figure: *Symphony No. 9* (fourth movement)
 - ◆ Romantic composers and works:
Franz Schubert, lieder (art songs): *Die Forelle* (“The Trout”),
Gretchen am Spinnrade (“Gretchen at the Spinning Wheel”)
Frederic Chopin: “Funeral March” from *Piano Sonata No. 2 in B flat minor*, “Minute” Waltz, “Revolutionary” Etude in C minor
Robert Schumann, *Piano Concerto in A Minor*

IX. Latin 1A

Student Resource:

- *Wheelock's Latin*, 7th ed., Frederic M. Wheelock and Richard A. LaFleur

Supplementary Teacher Resources:

- *Lingua Latina per se Illustrata, Pars I: Familia Romana*, Hans H. Ørberg
- *Lingua Latina per se Illustrata. Pars I: Latine Disco Student Manual*, Hans Ørberg
- *Workbook for Wheelock's Latin*, Paul Comeau and Richard A. LaFleur
- *Thirty-Eight Latin Stories Designed to Accompany Wheelock's Latin*, 5th ed., Anne Groton and James May
- *Classical Mythology & More: A Reader Workbook*, Marianthe Colakis and Mary Joan Masello
- *To Be a Roman: Topics in Roman Culture*, Margaret Brucia and Gregory Daugherty

a. Chapter 1

- ◆ Verbs
- ◆ First and Second Conjugations
- ◆ Adverbs
- ◆ Reading and Translating

b. Chapter 2

- ◆ First declension nouns and adjectives
- ◆ Prepositions
- ◆ Conjunctions
- ◆ Interjections

c. Chapter 3

- ◆ Second declension masculine nouns and adjectives
- ◆ Apposition
- ◆ Word Order

d. Chapter 4

- ◆ Second declension neuters
- ◆ Adjectives
- ◆ Present of *sum*
- ◆ Predicate nominatives
- ◆ Substantives

e. Chapter 5

- ♦ First and second conjugations
- ♦ Future and imperfect
- ♦ Adjectives in *-er*
- f. Chapter 6
 - ♦ *Sum* and *possum*: complementary infinitive
- g. Chapter 7
 - ♦ Third declension nouns
- h. Chapter 8
 - ♦ Third conjugation: present system
- i. Chapter 9
 - ♦ Demonstratives *hic, ille, iste*
 - ♦ Special *-ius* adjectives
- j. Chapter 10

Eleventh Grade

I. Literature

Teacher Resources:

- *Adventures of Huckleberry Finn*, Mark Twain, Norton Critical Edition
- *A Good Man is Hard to Find*, Flannery O'Connor

Student Resources:

- *Adventures of Huckleberry Finn*, Mark Twain
- *Moby Dick*, Herman Melville
- *The Scarlet Letter*, Nathaniel Hawthorne
- American Poetry Packet, Barney Charter School Initiative
- *Elements of Style*, Strunk & White

a. Fall Semester

- ◆ Nathaniel Hawthorne, *The Scarlet Letter*
- ◆ Anne Bradstreet, poetry
- ◆ Ralph Waldo Emerson, essays, esp. "Self-Reliance"
- ◆ Herman Melville, *Moby Dick* (begin)

b. Spring Semester

- ◆ Herman Melville, *Moby Dick* (finish)
- ◆ Walt Whitman, poetry selections
- ◆ Edgar Allan Poe, poetry selections
- ◆ Henry Wadsworth Longfellow, poetry selections
- ◆ Mark Twain, *Huckleberry Finn*
- ◆ Poetry of Emily Dickinson and Robert Frost
- ◆ Flannery O'Connor, "A Good Man Is Hard to Find"
- ◆ T. S. Eliot, poetry selections

II. History

Resources:

- *America: The Last Best Hope, Vol. 1*, William J. Bennett
- *A History of the American People*, Paul Johnson
- *American Heritage: A Reader* from Hillsdale College
- *Letters of a Nation: A Collection of Extraordinary American Letters*, edited, Andrew Carroll
- *The Autobiography of Benjamin Franklin*

Fall Semester –

- a. Early Civilizations and Exploration
 - ◆ Native Americans prior to European colonization
 - ◆ European Explorers: French, Dutch, and English explorers in North America
- b. From Settlement to Colony
 - ◆ Mid-Atlantic Colonies
 - ◆ New England Colonies
 - ◆ Southern Colonies
 - ◆ First Great Awakening
- c. French and Indian War to the Revolutionary War
 - ◆ French and Indian War
 - ◆ Intolerable Acts, etc.
 - ◆ Revolutionary War
- d. History of the Constitution
 - ◆ Aftermath of the Revolution
 - ◆ Articles of Confederation
 - ◆ Shays' Rebellion
 - ◆ Writing a Constitution: Summer of 1787
 - ◆ Passing a Constitution: Federalism vs. Anti-Federalism; Federalist papers
 - ◆ Federalists: Presidencies of Washington and Adams
- e. Jeffersonian America

- ◆ Election of 1800
- ◆ Jeffersonian Democrats
- ◆ War of 1812
- ◆ Indians and the Frontier
- ◆ Second Great Awakening

Spring Semester –

f. Jacksonian America

- ◆ Andrew Jackson's presidency
- ◆ Emergence of the Whig Party

g. Antebellum Era

- ◆ Slavery and Abolition
- ◆ Mexican-American War
- ◆ Whig Presidents
- ◆ Lincoln-Douglas Debates

h. Civil War

- ◆ Efficient causes of war: Election of 1860, Secession of the South, Confederate States, Confederate Constitution
- ◆ Major battles, generals, and strategy: Firing on Ft. Sumter, First and Second Battles of Bull Run, Antietam, Gettysburg, Sherman's March to the Sea, Robert E. Lee, Stonewall Jackson, Ulysses S. Grant, William Tecumseh Sherman, Winfield Scott, George B. McClellan
- ◆ Emancipation Proclamation: politics of emancipation, also include the Gettysburg Address
- ◆ Lincoln's Second Inaugural, plans for Reconstruction, and assassination

i. Reconstruction

- ◆ Presidential Reconstruction
- ◆ Congressional Reconstruction
- ◆ Civil War Amendments

- ◆ Election of 1876
- j. Reconstruction through 1900
 - ◆ The South after Reconstruction
 - ◆ The closing frontier
 - ◆ Reformers: Prohibitionists, Suffragettes, Populists, Social Gospelers
 - ◆ Industrialization: Technology and Big Business
 - ◆ Urbanization and Major Cities
 - ◆ Parties, Congress, and the Presidency

III. Government

Resources:

- American Government Readings packet, Barney Charter School Initiative
- *Government Class Book*, Andrew Young (1865 student text)

Teacher Resources:

- *We Still Hold These Truths*, Matthew Spalding
- *The US Constitution: A Reader*, Hillsdale College Press
- *Vindicating the Founders*, Thomas West
- *American Progressivism: A Reader*, ed. Ronald J. Pestritto

- a. Principles of Government: Declaration of Independence
 - ◆ Equality, unalienable rights, human nature, natural law, natural rights
 - ◆ Social Contract Theory
 - ◆ Limited government
 - ◆ Consent
 - ◆ Despotism, right of revolution
- b. American Constitutionalism
 - ◆ Rule of law and a written constitution
 - ◆ Brief history of the American Revolution, formation of the Union
 - ◆ Requirements of republican government: representation, federalism, separation of powers, checks and balances, independent judiciary

- c. Three Branches of Government
 - ◆ Legislative: enumerated powers, legislative power, House of Representatives, Senate, bicameralism, deliberation
 - ◆ Executive: executive power, presidency, war powers
 - ◆ Judicial: judicial power, judicial review, state and district courts, Supreme Court
- d. Bill of Rights
 - ◆ Amendments 1-10
 - ◆ Religious liberty, free speech, procedural rights
- e. Early Supreme Court Cases
 - ◆ Judicial review: *Marbury v. Madison*
 - ◆ The debate over a national bank: *McCulloch v. Maryland*
- f. Crisis of Constitutional Government
 - ◆ The founders on slavery
 - ◆ *Dred Scott v. Sanford*
 - ◆ Lincoln on *Dred Scott*, Lincoln on slavery
 - ◆ Secession and the Civil War
 - ◆ Lincoln's wartime Constitutionalism
 - ◆ Post-war amendments
- g. Progressivism
 - ◆ Historical progress, historical contingency
 - ◆ Administration vs. politics
 - ◆ Rejection of separation of powers, federalism, representation
- h. Institutionalizing Progressivism
 - ◆ New Deal, Great Society
 - ◆ Expansive presidential leadership
 - ◆ Administrative state, rule by bureaucracy, regulation of economy, delegation of lawmaking
- i. Modern American Government
 - ◆ Political parties

- ◆ Elections, campaigns, media
- ◆ Administrative state

IV. Moral Philosophy

Nota Bene:

More than any other class, the Moral Philosophy course will depend upon the expertise of the teacher. A teacher who tries to learn the subject while teaching it for the first time will find himself or herself ill-equipped to answer questions, direct student discussion, or even ask the right questions of the texts. Because subject-mastery is demanded of the teacher, the teacher should make his or her own decisions about what texts and subjects to include. Content will also depend upon the capabilities and interests of students, so a teacher may find it necessary to revise the syllabus from year to year.

a. Content That Should Be Covered

- ◆ Cardinal Virtues: Courage, Justice, Moderation, Wisdom, Prudence
- ◆ Other Practical/Moral Virtues: Friendship, Magnanimity
- ◆ Nature as a normative standard: Natural Right, Natural Law, Natural Rights
- ◆ History as a normative standard
- ◆ Consequentialism, Utilitarianism
- ◆ Relativism, nihilism, modern conceptions of the will

b. Authors and Works That Might Be Covered (not a comprehensive list)

- ◆ Aristotle, *Nicomachean Ethics*
- ◆ Plato, *Republic*
- ◆ Cicero, *De Officiis* and *De Amicitia*
- ◆ St. Augustine, *Confessions* and *City of God*
- ◆ St. Aquinas, *Summa Theologiae*
- ◆ John Locke, *Some Thoughts Concerning Education*
- ◆ Jean Jacques Rousseau, *Emile*
- ◆ Immanuel Kant, *Grounding for the Metaphysics of Morals*
- ◆ John Stuart Mill, *On Liberty*
- ◆ Georg Wilhelm Friedrich Hegel, *Introduction to the Philosophy of History*

- ◆ Karl Marx, *The Communist Manifesto*
- ◆ Nietzsche, *Beyond Good and Evil*
- ◆ Aldous Huxley, *Brave New World*
- ◆ C.S. Lewis, *Abolition of Man* and *The Four Loves*
- ◆ Alasdair MacIntyre, *After Virtue*
- ◆ Allan Bloom, *The Closing of the American Mind*

V. Mathematics

Resources:

- *Precalculus*, Michael Sullivan
- *Trigonometry*, I.M. Gelfand and Mark Saul

Supplementary Resources:

- *Schaum's Outline of Trigonometry*, Robert Moyer
- *A Second Course in Algebra* (including the Solutions Manual and the Teachers Edition), Arthur W. Weeks and Jackson B. Adkins
- *Mathematical Mysteries* by Calvin C. Clawson

Fall Semester

- c. Functions and Graphs Review (Sullivan Ch. 1-2) (3 Weeks)
 - ◆ The Coordinate Plane
 - ◆ The distance and midpoint formulas
 - ◆ Graphs of equations in two variables; intercepts; symmetry
 - ◆ Lines/Circles
 - ◆ Functions and their graphs
 - ◆ Properties of functions
 - ◆ Library of functions;
 - ◆ Piecewise-defined functions
 - ◆ Graphing techniques: transformations
 - ◆ Mathematical models: building functions
- d. Linear and Quadratic Functions (Sullivan Ch. 3) (2 Weeks)
 - ◆ Linear functions/properties
 - ◆ Writing linear functions
 - ◆ Quadratic functions/properties

- ◆ Writing quadratic functions
- e. Polynomial and Rational Functions (Sullivan Ch. 4) (2 Weeks)
 - ◆ Polynomial functions and models
 - ◆ Rational functions/properties
 - ◆ Graphing polynomials and rational functions
 - ◆ Finding zeroes of a function
- f. Exponential and logarithmic functions (Sullivan Ch. 5) (2 Weeks)
 - ◆ Composite functions
 - ◆ Exponential/logarithmic functions and graphs
 - ◆ Properties of exponents/logarithms
 - ◆ Logarithmic and exponential equations
- g. Trigonometry Introduction/Ratios of a Triangle (Saul&Gelf Ch. 0-1) (3 Weeks)
 - ◆ Right angles
 - ◆ Pythagorean Theorem
 - ◆ Sine, cosine, tangent, cotangent, secant, cosecant
- h. Relations Among Trigonometric Ratios (Saul&Gelf Ch. 2-3) (3 Weeks)
 - ◆ Finding numerical values of angles using trigonometric ratios
 - ◆ Trigonometric identities and inequalities
 - ◆ Solving right triangles
 - ◆ The sine ratio and circle chords
 - ◆ Geometry of a triangle
 - ◆ Law of sines
 - ◆ Area of a triangle
 - ◆ Law of cosines
- i. Angles, Rotations, and Radians (Saul&Gelf Ch. 4-5) (3 Weeks)
 - ◆ Measuring rotations/angles
 - ◆ Trigonometric functions for all angles
 - ◆ Odd and even functions
 - ◆ Radian measure for angles and rotations and distance

- ♦ Sine function graphing
- ♦ Area under the sine curve; the tangent to the sine curve

Spring Semester

- j. Trig Identities (Saul&Gelf Ch. 6-7) (3 Weeks)
 - ♦ Sine and cosine identities
 - ♦ Addition formulas
 - ♦ Principle of analytic continuation
 - ♦ Tangent formulas
 - ♦ Doubling and tripling the angle
 - ♦ Derivation of sine and cosine formulas
 - ♦ Converting products of sines and cosines to sums and vice versa
- k. Graphs of Trig Functions (Saul&Gelf Ch. 8) (3 Weeks)
 - ♦ Graphing the basic sine curve
 - ♦ The period of the function $y = \sin x$
 - ♦ Periods and amplitudes of other sinusoidal curves
 - ♦ Shifting and stretching the sine
 - ♦ Half-period shifts
 - ♦ Graphing the tangent and cotangent functions
 - ♦ Sums of sinusoidal functions
 - ♦ Linear combinations of sines and cosines
- l. Inverse Functions and Trigonometric Equations (Saul&Gelf Ch. 9) (3 Weeks)
 - ♦ Functions and inverse functions
 - ♦ Arcsine: The inverse function to sine
 - ♦ Graphing inverse functions
 - ♦ Trigonometric equations
- m. Systems of Equations and Inequalities (Sullivan Ch. 11) (3 Weeks)
 - ♦ Systems of linear equations: substitution and elimination,
 - ♦ Matrices and determinants
 - ♦ Matrix algebra

- ♦ Partial fraction decomposition
- ♦ Systems of nonlinear equations
- ♦ Systems of inequalities
- n. Sequences and Series (Sullivan Ch. 12) (3 Weeks)
 - ♦ Arithmetic sequences
 - ♦ Geometric sequences
 - ♦ Geometric series
 - ♦ Mathematical induction
 - ♦ The Binomial Theorem
- o. Counting and Probability (Sullivan Ch. 13) (2 Weeks)
 - ♦ Counting
 - ♦ Permutations and combinations
 - ♦ Probability
- p. Preview of Calculus (Sullivan Ch. 14) (1 Week)
 - ♦ Finding limits using tables and graphs
 - ♦ Algebra techniques for finding limits
 - ♦ One-sided limits; continuous functions
 - ♦ The tangent problem; the derivative
 - ♦ The area problem; the integral

VI. Science

Resources:

- *Physics*, Raymond A. Serway and Jerry S. Faughn (Holt McDougal)

- a. Introduction; motion in one dimension
 - ♦ Measurement, units and conversion
 - ♦ Displacement, velocity, acceleration
 - ♦ Interpreting motion graphs
 - ♦ Free fall
- b. Two-dimensional motion and vectors

- ◆ Vector operators
- ◆ Projectile motion
- ◆ Relative motion
- c. Forces and the Laws of Motion
 - ◆ Free body diagrams
 - ◆ Newton's Laws
 - ◆ Friction; static and dynamic equilibrium
 - ◆ Applications of Newton's Laws
- d. Work and Energy
 - ◆ Work
 - ◆ Energy
 - ◆ Conservation of energy
 - ◆ Power
- e. Momentum and collisions
 - ◆ Momentum and impulse
 - ◆ Conservation of momentum
 - ◆ Collisions
- f. Circular motion and gravitation
 - ◆ Rotational motion
 - ◆ Tangential and centripetal acceleration
 - ◆ Gravitation
 - ◆ Kepler's laws
 - ◆ Torque
 - ◆ Simple machines
- g. Vibrations and waves
 - ◆ Simple harmonic motion
 - ◆ Hooke's Law
 - ◆ Pendulums
 - ◆ Wave motion and wave interactions
- h. Sound

- ◆ Sound waves
- ◆ Doppler Effect
- ◆ Sound intensity
- ◆ Resonance
- ◆ Harmonics
- ◆ Physics of music
- i. Light and geometric optics
 - ◆ Characteristics of light
 - ◆ Flat and curved mirrors
 - ◆ Refraction
 - ◆ Total internal reflection
 - ◆ Thin lenses
 - ◆ Interference and diffraction of light
- j. Electrostatics
 - ◆ Electrostatics introduction
 - ◆ Coulomb's Law
 - ◆ Superposition principle
 - ◆ Electric fields
 - ◆ Electric potential energy
 - ◆ Electric potential
 - ◆ Capacitance
- k. Electric Circuits
 - ◆ Circuits
 - ◆ Resistance
 - ◆ Ohm's Law
 - ◆ Series and parallel circuits
 - ◆ Complex resistor combinations
- l. Magnetism
 - ◆ Magnets and magnetic fields
 - ◆ Electromagnetism

- ◆ Magnetic force
- ◆ Induced current
- ◆ Generators and motors

D. Reading curriculum

Reading is at the very heart of NCA's curriculum. In the earliest grades, the curriculum focuses primarily on language, with the bulk of the school day given to teaching literacy and numeracy. Both subjects are foundational to a student's education, so the resources and methods deployed in each case must be consistent and excellent. We will therefore use the Riggs Institute's *The Writing & Spelling Road to Reading & Thinking*, as supplemented by Access Literacy, LLC to teach literacy and related skills, and the Singapore Math program to teach numeracy. NCA will also use McCall-Crabbs readers (scaled readers from the earliest reading levels through high school) for reading comprehension and assessment.

The Riggs Institute's *The Writing & Spelling Road to Reading & Thinking* is a multi-sensory, brain-based approach for teaching phonics, spelling, reading, handwriting, and grammar. The Riggs program is closely related to the Orton-Gillingham and Spalding Methods, and practitioners of these will quickly recognize the basics of the Riggs program. The Riggs program teaches the 71 letter-sound (phonogram) combinations used in the English language, beginning with the easiest sight-to-sound correspondences, and working towards those that are most complex. Syllabication is critical to a proper understanding of letter-sound relationships, so the Riggs program teaches syllabication from the beginning of kindergarten. Alongside learning phonograms and implementing these into a potent spelling and vocabulary regimen, students using the Riggs program will learn handwriting, including cursive handwriting. As students grasp the basics of English literacy, the program lays a foundation in basic grammar and composition.

According to the Riggs Institute¹, *The Writing & Spelling Road to Reading & Thinking* helps teachers to instill the following language arts "strands" and cognitive development:

- "Explicit" Phonics with Dictated Initial Letter Formation
- The Alphabetic Principle
- Phonemic and Graphemic Awareness
- Correct Spelling with 47 Rules
- Fluent Oral and Silent Reading
- Oral and Print Comprehension
- Vocabulary
- Pronunciation and Speech
- Creative and Organizational Composition
- Grammar/Syntax/Punctuation/Capitalization
- Analytical and Inferential Thinking
- Auditory/Visual/Verbal/Motor Cognitive Development in:
 - Attention
 - Discrimination
 - Association
 - Memory

¹ The Riggs Institute, www.riggsinst.org

NCA will also provide differentiated instruction in its literacy and reading curriculum. The Riggs program is quite similar to the programs employed by many schools for reading remediation (such as Orton-Gillingham and Spalding). By using this program with all students, we expect to address/prevent many student literacy problems before they develop. Students who are reading and writing at a slower pace than their grade cohort will be trained in the language of instruction used in reading remediation and they will receive remediation as problems are identified. NCA will develop a program to provide struggling students with additional literacy instruction, likely through flexible scheduling blocks or classroom pull-outs. Additionally, students will receive differentiated instruction in the course of reading practice, wherein students will be grouped by ability and/or led through a reading practice regimen designed to meet each student at his or her ability level. A remediation and enrichment daily class period will allow for additional time to support struggling readers or accommodations for students with special needs.

Once students have learned how to read, reading comprehension exercises will slowly be replaced with literature. From Grade 3 forward, literature will become a primary component of the curriculum, one of the four curricular cores. Literature in the younger grades (especially in Grades 3-5) will expose students to a certain level of cultural literacy and understanding, thereby allowing them to understand the literary traditions that they have inherited from characters like Robin Hood and writers like Robert Louis Stevenson. Literature in the upper grades will have the same purpose, but with the additional benefit of students reading the works in their original form (or as close to the original form as is possible for translated texts) to develop their own understanding of and facility with the language. The literary texts increase in difficulty and depth. Students receive further reading instruction through expanding vocabulary, grammatical analysis, and class discussion. They are presented with tales that are gripping and meaningful. Teachers are trained not only how to teach this literature as just described, but also to engage the students in wonder. These book choices have captivated multiple generations, some over hundreds, even thousands of years, nurturing a love of literature and so of reading.

Students who are capable of work above their grade level may be given the option to read additional works of literature or read adapted works in an original or longer form. Students who are behind their grade cohort may receive adapted reading assignments (or shorter adapted works of literature), audiobooks, read-alouds of the original, or other helps as identified by the teacher and administrator.

NCA will fully participate in all aspects of the state testing and other assessments as required by state statute. The school will also conduct its own data analysis of student learning by any other proven assessment tools deemed necessary and appropriate, including, but not limited to, Riggs student inventories, as diagnostic reading assessments in our tiered interventions, teacher-created assessments, portfolios, and observation. This data will be used to identify students not making adequate progress toward the state standards to implement an individualized program to improve measurable learning outcomes. The school will seek to analyze reports from different perspectives to maximize the usefulness of information gained from the accountability process. Such analysis may include viewing student-learning results by age groups, grade levels, previous academic experiences, gender, attendance and any other aspects of the student population that will enhance the school's knowledge about student learning needs.

E. Pupil Progression Plan, if applicable

Naples Classical Academy

Student Progression Plan

Introduction

The purpose of the Naples Classical Academy (NCA) Student Progression Plan is to share with school personnel, parents, students, and other interested citizens, the NCA School Board rules and administrative procedures being followed to implement state legislative and NCA student progression requirements.

NCA Progression Plan has been developed using best practices for classical education models, it includes the procedures identified in FS 1008.25 “Public school student progression; student support; reporting requirements”.

Student progression at NCA is based upon an evaluation of each student's performance on assessments, assignments, quizzes and social maturity observations. School staff make the decision regarding promotion and retention using this evaluation results.

It is the intent of NCA that each student’s progression from one grade to another be determined, in part, upon satisfactory performance in English language arts, social studies, science, and mathematics; that NCA policies facilitate student achievement; that each student and his or her parent be informed of that student’s academic progress; and that students have access to educational options that provide academically challenging coursework or accelerated instruction.

As part of the NCA Student Progression Plan, procedures have been created to achieve understanding and cooperation on the part of parents and students. Our goal will be to gain acceptance of the student's promotion or placement decisions from one grade to another based on the student’s mastery of the standards and curriculum for English Language Arts, mathematics, science and social studies. The student and parents must have sufficient opportunity to understand the promotion and placement decisions. When it becomes evident that the student may not be promoted, parents will be informed of the possibility of retention or special placement. Student report cards, interim progress reports, reports to parents on assessment testing, and parent conferences serve as the means of communicating student progress and achievement of the standards.

NCA staff will be responsible for making recommendations regarding each student's readiness to function academically at the next grade level to the principal. The principal is responsible for making the final decision regarding grade placement.

Social Promotion

No student may be assigned to a grade level based solely on age or other factors that constitute social promotion.

Students Retained More than One Year

NCA has the responsibility of developing an appropriate alternative placement for a student who has been retained for two or more years.

Allocation of Resources

NCA requires that remedial and supplemental instructional resources must be allocated as follows:

1. first, to students who are deficient in reading by the end of Grade 3, and
2. second, to students who fail to meet performance levels required for promotion.

NCA provides several means for parent notification regarding student progress: statewide standardized assessment results, school assessment results, report cards, and interim reports. NCA will develop and implement a Progress Monitoring Plan for each student who fails to meet certain performance levels on statewide standardized assessments or NCA proficiency expectations.

Progress Monitoring Plan (PMP)

Students must meet school expectations in their performance in reading, writing, mathematics, history, and science. NCA has implemented a school-wide Progress Monitoring Plan (PMP) for all students. This PMP will include the following components dependent on grade level:

1. Student Assessment Data (all students based on grade)
 - a. DIBELS Assessments
 - b. Riggs Testing
 - c. Math Facts Testing
 - d. Writing Assessments
 - e. State Assessment Test Results (FSA, etc.)
2. Academic Weaknesses (for low performing students)
 - a. Reading
 - b. Writing
 - c. Mathematics
 - d. Science
 - e. History
3. Targeted Interventions (for low performing students)
 - a. Remedial Classes
 - b. Pull-out Instruction
 - c. Push-in Instruction
4. Frequency and Settings (for low performing students)
 - a. Daily, Weekly or Monthly
 - b. Pull-In/Push-out
5. Reporting Methods
 - a. Interim Report Cards
 - b. Quarterly Report Cards
 - c. Individual Education Plan (IEP)
 - d. 504 Plan
 - e. Letters to Parents (for low performing students)

NCA will develop a plan in consultation with the parents of low performing students. A student who is not meeting NCA or state requirements for proficiency in reading, writing, or mathematics shall be covered by one of the following plans to target instruction and to identify ways to improve his or her academic achievement:

1. A federally required student plan such as an Individual Educational Plan (IEP).
2. A schoolwide system of progress monitoring for all students, except a student who scores Level 4 or above on the English language arts and mathematics assessments may be exempted from participation by the principal; or
3. An individualized progress monitoring plan.

The plan chosen will be designed to assist the student in meeting the state and NCA expectations for proficiency. When the student has an IEP that addresses the areas of deficiency, an additional PMP is not required.

It shall be the responsibility of the teachers to provide instruction in and assess student mastery of all of the performance standards identified for each course. Assessment of student mastery of the performance standards will be made using:

1. comprehensive course examinations or culminating activities or projects, and
2. teacher observation, classroom assignments, and/or teacher-made or commercial tests

during each grading period.

NCA Grading System

Grades are a useful tool to evaluate the extent to which a student has mastered a particular skill or course. Therefore, grades will be assigned in all subjects. Naples Classical Academy will assign grades in order to reflect accurately the range between true mastery and insufficient knowledge of a subject. Grade inflation will be discouraged. In this scheme the following letter grades have these meanings:

The following grade scale will be used by the school for Grades K-1:

- O Outstanding
- S Satisfactory
- N Needs Improvement
- U Unsatisfactory

The following grade scale will be used by the school for Grades 2 through 12::

- A (90% - 100%) Superior
- B (80% - 89%) Above Average
- C (70% - 79%) Average
- D (60% - 69%) Below Average
- F (0% - 59%) Unsatisfactory
- I – Incomplete
- P – Pass; credit earned
- W - No grade; no credit earned

Incompletes will only be given under special circumstances as determined by the principal. Parents and students should always be informed of the student's progress.

Interim Progress Report

Interim Progress Reports will be sent home for all students in grades K-12 and used to notify parents and guardians of their child's progress. These will also be useful in notifying parents about students being considered for retention. Interim Progress Reports are issued in the middle of each marking period for students earning a C- or below.

Quarterly Progress Report

A Quarterly Progress Report shall be provided to all students in grades K-12 and used to inform parents or guardians of their child's progress, and to inform parents of students being considered for retention.

The evaluation of each student's progress will be based upon the student's classroom work, observations, tests, and other relevant information. Progress reporting will be provided to the parent in writing using the NCA proprietary report card.

Florida Virtual School (FLVS)

NCA does not allow FLVS courses to be substituted for the classical education curriculum.

FLVS classes will be approved on a case-by-case basis. Credits earned in unauthorized FLVS

courses will not count toward the NCA graduation credit requirements.

Student Assessment

Statewide Assessments

Each student must participate in the statewide, standardized assessment program required by s. 1008.22. Each student who does not achieve a Level 3 or above on the statewide, standardized English language arts assessment, the statewide, standardized mathematics assessment, or the Algebra I EOC assessment must 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. This evaluation will be performed after receipt of the assessment results.

Statewide Assessment Results

No student will be retained solely on the basis of statewide assessments. The results of these statewide, standardized evaluations are used to monitor a student's progress in grades K-12 and will be provided to the student's teacher and parent in a timely manner and as otherwise required by law. These evaluations are provided using a formal delivery sequence:

1. FDOE provides the results to the school district
2. School district provides the results to NCA
3. NCA provides the results to each teacher
4. NCA provides the results to each parent

NCA Assessments

The assessments listed below are used by NCA to measure student progress:

- Weekly teacher progress tests
- Riggs reading tests
- Weekly math facts tests
- Writing assessments

Reading Deficiency

Any student who exhibits a substantial deficiency in reading, based upon locally determined or statewide assessments conducted in kindergarten or Grades 1, 2, or 3, or through teacher observations, will be given intensive reading instruction immediately following the identification of the reading deficiency. The student's reading proficiency will be monitored and the intensive instruction will continue until the student demonstrates grade level proficiency in a manner determined by NCA, which may include achieving a Level 3 on the statewide, standardized English language arts assessment.

Parent Notification

NCA provides written notification to the parent of any kindergarten through third-grade student, who exhibits a substantial deficiency in reading.

NCA Communicates the Following to Parents

1. That his or her child has been identified as having a substantial deficiency in reading.
2. A description of the current services that are provided to the child.
3. A description of the proposed supplemental instructional services and supports that will be provided to the child that are designed to remediate the identified area of reading deficiency
4. 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 is exempt from mandatory retention for good cause.
5. Strategies for parents to use in helping their child succeed in reading proficiency.

6. That the statewide, standardized English language arts assessment is not the sole determiner of promotion, and that additional evaluations, portfolio reviews, and assessments are available to the child to assist parents and the school in knowing when a child is reading at or above grade level and ready for grade promotion.
7. NCA's specific criteria and policies for a portfolio and the evidence required for a student to demonstrate mastery of Florida's academic standards for English language arts. A parent of a student in Grade 3 who is identified anytime during the year as being at risk of retention may request that the school immediately begin collecting evidence for a portfolio.
8. NCA's specific criteria and policies for midyear promotion. Midyear promotion means promotion of a retained student during the first semester of the year of retention once the student has demonstrated ability to read at grade level.

Promotion

It is the intent of the Legislature that each student's progression from one grade to another be determined by proficiency in reading, writing, science, and mathematics. The NCA Board policies facilitate such proficiency. Each student and his or her parent are informed of the student's academic progress.

NCA has established a comprehensive program for student performance that includes items as documented in the following sections.

The NCA principal has the authority to approve whole year and mid-year promotions as well as subject matter acceleration.

Mid-Year Demotion

Students can receive a mid-year demotion, with evidence that the student will benefit more from the instructional program at the lower grade level. The probable long-range academic, social, and emotional effects on the student should be considered in any demotion decision. Parents may request mid-year demotion by contacting the principal. The principal has the responsibility for making such assignments after discussions with the parents. The student's cumulative record will reflect the "lower grade placement" and major reason(s) for the assignment. Parents will be notified, in writing, that their child is receiving a lower grade placement to the next lower grade. A copy of this notification shall be placed in the cumulative record.

Academically Challenging Curriculum to Enhance Learning (ACCEL) Options

Academically Challenging Curriculum to Enhance Learning (ACCEL) options are educational options that provide academically challenging curriculum or accelerated instruction to eligible public-school students in kindergarten through Grade 12.

The principal considers the following student eligibility requirements for the ACCEL program:

1. The student's performance on a locally determined assessment, a statewide assessment, or a statewide, standardized assessment.
2. The student's grade point average.
3. The student's attendance and conduct record.
4. Recommendations from one or more of the student's teachers in core-curricula courses.

The following exceptions apply to ACCEL Options:

1. Kindergarten students may not qualify for mid-year and full year promotion as they may not meet first grade admission requirements per state law (1003.21(1)(b) F.S.).
2. Third grade students would not be eligible to for subject matter acceleration for ELA or a mid-year promotion to fourth grade due to the state reading requirement.

Parents and students should contact the head of school for information related to student eligibility and process requirements for whole-grade promotion, mid-year promotion, and subject-matter acceleration

Whole-Grade Promotion

Students can be accelerated to a higher grade, with evidence that the student will benefit more from the instructional program at the advanced grade level. In the classical model, whole-grade promotion is rare due to the content-based curriculum. Therefore, whole-grade promotion will be considered only if the content of the current grade curriculum has been obtained elsewhere. The probable long-range academic, social, and emotional effects on the student should be considered in any acceleration decision. Parents may request whole-grade promotion by contacting the principal. The principal has the responsibility for making such assignments after discussions with the parents. The student's cumulative record will reflect the "accelerated grade placement" and major reason(s) for the assignment. Parents will be notified, in writing, that their child is receiving an accelerated grade placement to the next higher grade. A copy of this notification shall be placed in the cumulative record.

Mid-Year Promotion

Students can receive a mid-year promotion, with evidence that the student will benefit more from the instructional program at the advanced grade level. The probable long-range academic, social, and emotional effects on the student should be considered in any acceleration decision. Parents may request mid-year promotion by contacting the principal. The principal has the responsibility for making such assignments after discussions with the parents. The student's cumulative record will reflect the "accelerated grade placement" and major reason(s) for the assignment. Parents will be notified, in writing, that their child is receiving an accelerated grade placement to the next higher grade. A copy of this notification shall be placed in the cumulative record.

Subject-Matter Acceleration

Students who wish to accelerate in a single subject area must have received an "A" in the subject area prerequisite course. Acceleration must follow NCA developed course sequences.

Middle school students may not earn high school credit for any courses other than those identified in this document as open to middle school students unless the student has received approval for single subject acceleration. This requirement applies to all students and all courses.

A middle school student who takes any high school courses shall be considered a ninth grader for that portion of the middle school instructional program in which they are enrolled in any high school courses. High school courses will impact high school grade point average (GPA). This will not exempt students from the requirement that they take one year of Latin while enrolled as a high school student.

Elementary School Student Progression

Elementary Grades

NCA uses the classical education definition of elementary school to include kindergarten through sixth grade. These classes have the same teacher for all four core subjects of ELA, mathematics, science, and social studies.

Sixth grade is considered to be the highest grade in the elementary school. Including it in the elementary grades versus the middle school grades is based largely upon the nature of the students at that age. Eleven-year old children are still relatively immature, and benefit from the supervision of a single teacher leading instruction in a self-contained classroom. Parents know this and prefer

their children to be overseen by one teacher who can know the student and monitor the student's behavior throughout the day. When students move into the middle school and travel from class to class under the instruction of various specialist teachers, the students are given more independence and must therefore exhibit more responsibility. Giving that freedom prematurely to younger students invites misconduct, particularly at a point when adolescence begins warring against order.

By identifying the sixth-grade students as the leaders of the elementary school and speaking with them about this responsibility, we lead the students into a posture to resist this tendency to misbehave. If sixth grade students see themselves as the youngest people in the middle school, then they will have an excuse to act as the least self-governing students in that range of grades. If they are told they are to be the leaders of the elementary school, then they can be instructed about the example they must set for the younger students. Thus, this structural approach on the grade classification can aid the school leaders as they seek to navigate the perilous waters of rooms full of pre-teenagers.

Criteria for Promotion in Elementary Grades of K thru 6

A student may be considered for retention when the student has earned less than a D in ELA or mathematics or has an average GPA less than two of the four core courses (ELA, Mathematics, Social Studies and Science). Student reading proficiency will be measured as part of the ELA test suite. Third-grade students have an additional requirement as identified in the next section.

Course grades are based on teacher evaluations using:

1. Classroom Tests
2. Quizzes
3. Assignments
4. Class Participation

Targeted Instructional Support

Students with identified deficiencies in ELA, mathematics, science and social studies will receive targeted or intensive interventions and supports will be matched to strategic and intensive instruction based on screening, progress monitoring, and diagnostic assessments. Initial criteria for consideration of a student for possible retention in grade are to be indicators of current educational progress. Diagnostic assessments are used to determine the area of need and to guide instruction.

ELA FSA Requirements for Promotion from Grade 3 to Grade 4

To be promoted to Grade 4, in addition to NCA's standard promotion requirements, a student must also score a Level 2 or higher on the statewide, standardized English language arts assessment required for Grade 3. If a student scores a Level 1 on the statewide, standardized third grade ELA assessment, the student must be retained unless he/she qualifies for a good cause exemption. Student's statewide assessment results will be used in promotion decisions, if available by the last day of the school year.

Good Cause Exemptions for Grade 3

NCA assists teachers with the implementation of reading strategies for students promoted with a good cause exemption which research has shown to be successful in improving reading among students who have reading difficulties.

Good cause exemptions are limited to the following:

For those third-grade students that scored a Level 1 on the FSA ELA assessment, the student must be retained, unless exempt from mandatory retention for Good Cause, as delineated below:

1. A student who demonstrates through a student portfolio that he or she is performing at least at Level 2 on the statewide, standardized English language arts assessment.
2. Limited English proficient students who have had less than two years of instruction in an English for Speakers of Other Languages program based on the initial date of entry into a school in the United States.
3. Students with disabilities whose individual education plan indicates that participation in the statewide assessment program is not appropriate, consistent with the state requirements.
4. Students who demonstrate an acceptable level of performance on an alternative standardized reading or English language arts assessment approved by the State Board of Education.
5. Students with disabilities who take the statewide, standardized English language arts assessment and who have an individual education plan or a Section 504 Plan that reflects that the student has received intensive instruction in reading or English language arts for more than two years but still demonstrates a deficiency and was previously retained in kindergarten, Grade 1, Grade 2, or Grade 3.
6. Students who have received intensive reading intervention for two or more years but still demonstrate a deficiency in reading and who were previously retained in kindergarten, Grade 1, Grade 2, or Grade 3 for a total of two years. A student may not be retained more than once in Grade 3.
7. Students who have received intensive remediation in reading or English language arts for two or more years but still demonstrate a deficiency and who were previously retained in kindergarten, Grade 1, Grade 2, or Grade 3 for a total of two years. Intensive instruction for students so promoted must include an altered instructional day that includes specialized diagnostic information and specific reading strategies for each student.

Requests for Good Cause Exemptions

Requests for good cause exemptions for students from the mandatory retention requirement shall be made consistent with the following:

1. Documentation shall be submitted from the student's teacher to the school principal that indicates that the promotion of the student is appropriate and is based upon the student's academic record. Such documentation shall consist only of the existing progress monitoring plan, individual educational plan, if applicable, report card, or student portfolio.
2. The school principal shall review and discuss such recommendation with the teacher and make the determination as to whether the student should be promoted or retained.

Grade 4 Intensive Reading Instruction

A student who is promoted to Grade 4 with a good cause exemption shall be provided intensive reading instruction and intervention that include specialized diagnostic information and specific reading strategies to meet the needs of each student so promoted.

Elementary Progression/Retention Procedures

Decisions as to promotion of a student should be made prior to the beginning of the school year, and should not be changed after the first week of school each year unless approved by the principal.

The school has established the following procedure for review of each case and for following the progress of students considered for retention:

1. Classroom teachers will submit a list of potential retentions to the principal prior to the FSA.
2. The principal will review and provide a preliminary determination of retention to the teacher.

3. School personnel will notify parents that retention is being considered and a conference to establish parent understanding and cooperation regarding grade placement will be offered to the parent.
4. A final review of the progress of each student being considered for retention will be performed in late May, and the principal will make a final decision regarding retention.
5. The final report card of the year will be used to notify the parent of the placement decision.
6. Due process, the right of review of the principal's decision regarding placement will be available to the parents or guardians to challenge the decision.
 - a. A translator will be provided to support communication, if required.
 - b. The due process review will be in the form of a conference between the parents, teacher, and principal; or designee.
 - c. After reviewing the parents input during the conference, the principal, or designee, shall render a decision.
 - d. The decision shall be communicated, in writing, to the parents.

Elementary students who have already been retained one year and fail to meet criteria for promotion a second time are to be referred to the Multi-Tiered System of Supports (MTSS) team for evaluation, and creation or updating of an individual Progress Monitoring Plan.

New Students

New students entering NCA with no previous school, or a lack of records, are to be placed in the grade with age-alike peers, or no more than one grade level below. Any deviation from this policy must have the approval of the principal.

Second Semester Students

Retention of students who entered NCA during the second semester, will be addressed on a case by case basis. Notification to parents of possible retention should be made as early as possible.

Retained Third Graders

Students who are retained due to earning a Level 1 on the third grade FSA ELA test are assigned to a highly effective teacher in the following year.

Immediate Intensive Intervention for Retained Students

Retained students will be provided intensive interventions in reading to ameliorate the student's specific reading deficiency, as identified by a valid and reliable diagnostic assessment. To accomplish this, NCA will provide third-grade students who are retained with intensive instructional strategies, services and supports to remediate the identified areas of reading deficiency, using methods prescribed by the school principal, which may include, but are not limited to:

1. 90 minutes of daily, uninterrupted, scientifically research-based reading instruction which includes phonemic awareness, phonics, fluency, vocabulary, and comprehension.
2. Integration of science and social studies content within the 90-minute block.
3. Small group instruction.
4. Reduced teacher-student ratios.
5. More frequent progress monitoring.
6. Tutoring or mentoring.
7. Transition classes containing third- and fourth-grade students.
8. Extended school day, week, or year.
9. Acceleration class.

Parent Notification

NCA provides written notification to the parent of any retained third-grade student, informing them

that their child has not met the proficiency level required for promotion. This communication includes the reasons their child is not eligible for a good cause exemption and a description of proposed interventions and supports that will be provided to their child to remediate the identified areas of reading deficiency.

Intensive Acceleration Class

NCA's Intensive Acceleration Class is for retained Grade 3 students who subsequently score Level 1 on the required FSA ELA test. The focus of the Intensive Acceleration Class shall be to increase the student's reading and English language arts skill level at least two grade levels in one school year. The Intensive Acceleration Class shall:

1. Be provided to a student in Grade 3 who scores Level 1 on the statewide, standardized English language arts assessment and who was retained in Grade 3 the prior year because of scoring Level 1.
2. Have a reduced teacher-student ratio.
3. Provide uninterrupted reading instruction for the majority of student contact time each day and incorporate opportunities to master the Grade 4 Florida Standards in other core subject areas.
4. Use a reading program that is scientifically research-based and has proven results in accelerating student reading achievement within the same school year.
5. Provide intensive language and vocabulary instruction using a scientifically research-based program, including use of a speech-language therapist.

Mid-Year Promotion Criteria for Retained Third-Grade Students

In compliance with Rule 64-1.094222, NCA offers mid-year promotions to fourth grade using the process below:

Midyear promotions of retained third-grade students should occur during the first semester of the academic year.

To be eligible for mid-year promotion, a student must demonstrate that he or she:

1. Is a successful and independent reader as demonstrated by reading at or above grade level;
2. Has met any additional requirements, such as satisfactory achievement in other curriculum areas, as determined by the policies of NCA.

Evidence of demonstrated mastery of third-grade reading is as follows:

1. Successful completion of a portfolio, or
2. Satisfactory performance on a locally selected standardized assessment measuring English Language Arts Standards.

To promote a student mid-year using a student portfolio there must be evidence of the student's mastery of third-grade English language arts Florida Standards. The student portfolio must meet the following requirements:

1. Be selected by the student's teacher;
2. Be an accurate picture of the student's ability and only include student work that has been independently produced in the classroom;
3. Include evidence of mastery of the standards assessed by the Grade 3 reading FSA English language arts assessment; and
4. Be signed by the teacher and the principal as an accurate assessment of the required reading skills.

To promote a student mid-year based on performance on a locally selected standardized assessment measuring English language arts Florida Standards, there must be evidence that the student scored at or above third-grade level in reading comprehension.

The Progress Monitoring Plan for any retained third-grade student who has been promoted mid-year to fourth grade must continue to be implemented for the entire academic year and if necessary, for additional school years.

Middle School Student Progression

NCA Middle School Grades

NCA uses the classical education definition of middle school to include seventh and eighth grades. These classes have a homeroom teacher and a subject area teacher for all subjects.

Middle School Requirements

The NCA college advisor, or designee will be responsible for ensuring graduation requirements are met for each student. Because Florida middle school graduation requirements change regularly, NCA will revisit the graduation requirements for each school year.

Middle School Progression

NCA middle school students are expected to take seven courses each semester. The following are expected minimum courses to be taken per semester:

1. ELA
2. Composition
3. Mathematics
4. Science
5. Social Studies
6. Latin
7. Art/Music

Students who fail a middle school core course (ELA, mathematics, science and social studies), must repeat it at the first opportunity.

The grade level progression of a middle school student from sixth, seventh to eighth grade will be determined by passing at least three out of four required courses (mathematics, language arts, science, social studies).

A student may not be promoted to eighth grade unless she/he is able to complete all remaining courses that need to be completed in order to move to ninth grade the following year (two language arts, two mathematics, two sciences and two social studies).

For example, a seventh-grade student who will need four eighth grade courses and four seventh grade courses would not be promoted to eighth grade because under the current NCA seven-period day schedule for middle school students, he or she could not complete eight courses.

Students with Disabilities Promotion

The IEP will drive the students' promotion plan.

MS Promotion to High School

Students in NCA middle school must complete the following:

1. Three ELA
2. Three Mathematics
3. Three Science
4. Three Social Studies (including one semester of that covers civics)
5. Three Latin
6. Three Music
7. Three Art

Middle School Promotion Details

- Three middle grades or higher courses in mathematics. To earn high school credit for Algebra I, a middle grades student must take the statewide, standardized Algebra I EOC assessment and pass the course, and in addition, beginning with the 2013-2014 school year and thereafter, a student's performance on the Algebra I EOC assessment constitutes 30 percent of the student's final course grade. To earn high school credit for Geometry course, a middle grades student must take the statewide, standardized Geometry EOC assessment, which constitutes 30 percent of the student's final course grade, and earn a passing grade in the course.
- Each student's performance on the statewide, standardized EOC assessment in civics education required under s. 1008.22 constitutes 30 percent of the student's final course grade. A middle grades student who transfers into the state's public school system from out of country, out of state, a private school, or a home education program after the beginning of the second term of grade 8 is not required to meet the civics education requirement for promotion from the middle grades if the student's transcript documents passage of three courses in social studies or two year-long courses in social studies that include coverage of civics education.
- Three middle grades or higher in science. Successful completion of a high school level Biology I course is not contingent upon the student's performance on the statewide, standardized EOC assessment required under s. 1008. 22. However, to earn high school credit for a Biology I course, a middle grades student must take the statewide, standardized Biology I EOC assessment, which constitutes 30 percent of the student's final course grade, and earn a passing grade in the course.

The High School Academic Plan

During the career-planning course the student must complete a four-year career academic plan for high school that must be signed by the student and the student's parent.

How the Plan Is Developed

While the students are in eighth grade, the NCA guidance counselor will meet with each student to discuss their high school course requests and to develop a proposed course request for ninth grade and a tentative four-year high school academic plan. Courses that are required each year are listed on the planning sheet. Electives are chosen to supplement the students' academic course work. There will be multiple elective alternative selections for the event that their first preference is not available.

- The students will take the tentative course request home for their parents to have an opportunity to review the courses that the students selected and which were recommended by the student services coordinator and teachers.
- Once the parents and students have reviewed the preliminary course request, the students will return it, with parents' signature, to the student services coordinator or teacher.
- The initial four-year plan is developed in detail in the eighth grade.
- The four-year plan will be updated every year through conferences scheduled by the student

services coordinator throughout the high school years.

The Department of Education course frameworks and professional development materials for the career and education planning course will be available for students.

Florida's career planning website, called Florida Educator's Toolkit, is available to help the student: <http://www.fldoe.org/academics/college-career-planning/educators-toolkit/index.shtml> .

The internet-based component is used when planning student careers, including researching salaries, what types of education they require for the career, etc. The following resources are also available: <https://www.floridashines.org/partners/mycareershines-implementation>

High School Courses Taken in Middle School

Middle School students may earn high school credit for the following courses:

- Middle school students in Grade 8 may take Algebra 1, Algebra 1 Honors, Geometry, Geometry Honors, Biology and any first or second year foreign language course, to earn high school credit.
- Middle school students in Grade 7 may also take the courses identified above but must have the permission of the NCA principal.

Middle school students may not earn high school credit for any other courses.

Middle School Promotion/Retention Procedures

Decisions as to promotion of a student should be made prior to the beginning of the school year, and should not be changed after the first week of school each year unless approved by the principal.

1. The principal (or designee) will review the academic records of students who have failed the first semester of a course, to identify any student that may not meet the middle school promotion criteria for promotion to eighth or ninth grade.
2. For those students deemed highly likely to be retained, school personnel will consult with parents to work towards parent understanding and cooperation regarding a student's grade placement.
3. Letters will be used to notify parents that retention is being considered.
4. After the end of school, a final review of the progress of each student being considered for retention will be performed, and the principal will make a final decision regarding retention.
5. The final report card of the year will be used to notify the parent of the placement decision.
6. Due process, the right of review of the decision of the principal regarding placement will be available to the parents or guardians to challenge the decision.
 - a. A translator will be provided to support communication, if required.
 - b. The due process review will be in the form of a conference between the parents, teacher and principal, or designee.
 - c. After reviewing the parents input during the conference, the principal, or designee, shall render a decision.
 - d. The decision shall be communicated, in writing, to the parents.

High School Student Progression

The progression of high school students is based on meeting requirements for diplomas or certificates of completion. A Naples Classical Academy high school diploma is awarded for earning the specified number of academic credits, including required and elective course credits, and earn a passing score on the statewide standardized assessment and End-of-Course (EOC) Assessment.

A student who has earned 24 credits for graduation but is unable to successfully complete the assessment requirements, will be awarded a certificate of completion in place of a high school diploma.

In the regular high school program, one credit is earned for successful participation in classes consisting of at least 120 hours on a block schedule or 135 hours on a traditional schedule, or its equivalent. However, graduation is also contingent upon completion of certain specifically required course credits.

High school credits are awarded for successful participation in specific courses as demonstrated through mastery of the high school performance standards adopted by the NCA Board for each course and meeting attendance requirements specified in this plan.

High School Progression

High school students will advance from one grade level designation to the next based upon completion of a school year of attendance. Thus, a student begins high school as a freshman, the second year of high school attendance will carry a designation of sophomore; after the third year of high school attendance, the student will have met the grade level classification to be a senior. Rising seniors must have 18 credits and a 2.0 GPA.

High School Requirements

The guidance counselor or designee will be responsible for ensuring graduation requirements are met for each student. Because Florida graduation requirements change regularly, NCA will revisit the graduation requirements for each school year. Florida requirements, [FS 1003.4282](#) requires successful completion of a minimum of 24 academic credits in Grades 9 through 12.

For each year that a graduating class is going through their high school grades, their graduation status will be tracked using a personalized tracking database. The following items will be tracked and may change based on the graduating year and current Florida statute:

Student earning the following will be eligible for a Florida standard diploma.

1. Credits earned status
 - a. ELA (4)
 - b. Mathematics (4)
 - i. Algebra 1
 - ii. Algebra 1 EOC passed
 - iii. Geometry
 - c. Science (3)
 - i. Biology (1)
 - ii. 2 lab courses
 - d. Social Studies (3)
 - i. United States History (1)
 - ii. World History (1)
 - iii. Economics (.5) which must include financial literacy
 - iv. United States Government (.5)
 - e. Fine or performing arts, speech and debate, or practical arts (1)
 - f. HOPE or equivalent Health/PE courses (1)
 - g. Electives (8)
2. One online course
3. Cumulative grade point average (GPA) of 2.0 on a 4.0 scale

NCA's Additional Graduation Requirements (generally taking the place of elective credits):

Student earning the standard courses above and the following will be eligible for a NCA standard diploma.

4. Credits earned status
 - a. ELA (additional)—5 credits in total
 - i. Composition (.5)
 - ii. Rhetoric (.5)
 - b. Mathematics—4 credits in total
 - i. Algebra 2 (1)
 - c. Science—4 credits in total
 - i. Chemistry (1)
 - d. Social Studies (additional)—6 credits in total
 - i. Moral Philosophy (.5)
 - ii. Western Civilization I (1)
 - iii. Western Civilization II (1)
 - e. World Language (3 additional)—3 credits in total
 - i. Latin (1)
 - f. A Senior Thesis: A 20-page senior thesis is required for graduation. It is typically completed in the senior year as part of the 12th-grade literature course.

The High School Academic Plan

How the Plan Is Developed

While the students are in eighth grade, the upper school dean or designee will meet with each student to discuss their high school course requests and to develop a proposed course request for ninth grade and a tentative four-year high school academic plan. Courses that are required each year are listed on the planning sheet. Electives are chosen to supplement the students' academic course work. There will be multiple elective alternative selections for the event that their first preference is not available.

- The students will take the tentative course request home for their parents to review the students' selections and staff recommendations.
- Once the parents and students have reviewed the preliminary course request, the students will return it, with parents' signature, to the upper school dean or teacher.
- The initial four-year plan is developed in detail in the eighth grade.
- The four-year plan will be updated every year through conferences scheduled by the upper school dean or designee throughout the high school years.

Florida Virtual School (FLVS)

3026010 HOPE-Physical Education (Core) or an equivalent course must be successfully completed to meet graduation requirements. Students will be encouraged to take HOPE-Physical Education or an equivalent course on FLVS to satisfy FS 1003.4282(4).

High School Deficiencies

NCA uses all available assessment results, including the results of statewide, standardized English language arts assessments and end-of-course assessments for Algebra I and Geometry, to advise students of any identified deficiencies and to provide appropriate postsecondary preparatory instruction before high school graduation.

Awarding of Credit

In compliance with 1003.436 F.S., NCA will award one half credit to a student who successfully

completes only the first or second half of a full credit course and receives a failing grade for the entire course. One full credit will be granted to a student who successfully completes only the first or second half of a full credit course and receives a passing grade for the entire course.

F. Assessment Schedule

Table F.1 State Assessment Schedule

The following assessment schedule is based on the preliminary FDOE 2020-2021 schedule.

Date ▼	Day ▼	Start Time ▼	Test ▼	Grade ▼	Minutes ▼
26-Mar		8:15	Reading Practice	3	80
29-Mar		8:15	Reading Practice	3	80
30-Mar		8:15	Reading Practice	3	80
31-Mar		8:15	Reading Practice	3	80
1-Apr		8:15	Reading Practice	3	80
1-Apr		8:15	Writing Practice	4	120
1-Apr		8:15	Writing Practice	5	120
1-Apr		8:15	Writing Practice	6	120
6-Apr	1	8:15	FSA Reading S1	3	80
7-Apr	2	8:15	FSA Reading S2	3	80
7-Apr		8:15	FSA Writing	4	120
7-Apr		8:15	FSA Writing	5	120
7-Apr		8:15	FSA Writing	6	120
28-Apr	1	8:15	Reading Practice S1	4	80
28-Apr	1	8:15	Reading Practice S1	5	80
28-Apr	1	8:15	Reading Practice S1	6	85
29-Apr	2	8:15	Reading Practice S2	4	80
29-Apr	2	8:15	Reading Practice S2	5	80
29-Apr	2	8:15	Reading Practice S2	6	85
3-May	1	8:15	FSA Reading S1	4	80
3-May	1	8:15	FSA Reading S1	5	80
3-May	1	8:15	FSA Reading S1	6	85
4-May	2	8:15	FSA Reading S2	4	80
4-May	2	8:15	FSA Reading S2	5	80
4-May	2	8:15	FSA Reading S2	6	85
5-May	1	8:15	Math Practice S1	3	80
5-May	1	8:15	Math Practice S1	4	80
5-May	1	8:15	Math Practice S1	5	80
5-May	1	8:15	Math Practice S1	6	60
6-May	2	8:15	Math Practice S2	3	80
6-May	2	8:15	Math Practice S2	4	80
6-May	2	8:15	Math Practice S2	5	80
6-May	2	8:15	Math Practice S2	6	60
7-May	3	8:15	Math Practice S3	6	60
10-May	1	8:15	FSA Math S1	3	80
10-May	1	8:15	FSA Math S1	4	80
10-May	1	8:15	FSA Math S1	5	80
10-May	1	8:15	FSA Math S1	6	60
11-May	2	8:15	FSA Math S2	3	80
11-May	2	8:15	FSA Math S2	4	80
11-May	2	8:15	FSA Math S2	5	80
11-May	2	8:15	FSA Math S2	6	60
12-May	3	8:15	FSA Math S3	6	60
12-May	1	8:15	NGSSS Science S1	5	80
13-May	2	8:15	NGSSS Science S2	5	80
14-May		8:15	FSA Make Ups	3-6	
14-May		11:15	FSA Make Ups	3-6	
14-May		13:15	FSA Make Ups	3-6	

Table F.2 Overall Assessment Plan

Date	Assessment	Frequency
	Initial Placement Tests	
20-Aug	Singapore Placement Tests	First 10 days of school
20-Aug	Reading Assessment Tests	First 10 days of school
20-Aug	DIBELS assessments	First 10 days of school
11-Sep	Florida Kindergarten Readiness Screener (FLKRS)	First 30 days of school
	Ongoing Interim Tests	
28-Aug	Classroom Tests	Weekly
28-Aug	Formative Assessments	Evaluated weekly
4-Sep	Classroom Tests	Weekly
4-Sep	Formative Assessments	Evaluated weekly
11-Sep	Classroom Tests	Weekly
11-Sep	Formative Assessments	Evaluated weekly
17-Sep	Classroom Tests	Weekly
17-Sep	Formative Assessments	Evaluated weekly
25-Sep	Classroom Tests	Weekly
25-Sep	Formative Assessments	Evaluated weekly
2-Oct	Classroom Tests	Weekly
2-Oct	Formative Assessments	Evaluated weekly
9-Oct	Classroom Tests	Weekly
9-Oct	Formative Assessments	Evaluated weekly
15-Oct	Riggs Spelling Assessment Tests	Monthly
15-Oct	Classroom Tests	Weekly
15-Oct	Formative Assessments	Evaluated weekly
23-Oct	Classroom Tests	Weekly
23-Oct	Formative Assessments	Evaluated weekly
30-Oct	Classroom Tests	Weekly
30-Oct	Formative Assessments	Evaluated weekly
6-Nov	Classroom Tests	Weekly
6-Nov	Formative Assessments	Evaluated weekly
13-Nov	Classroom Tests	Weekly

Date	Assessment	Frequency
13-Nov	Formative Assessments	Evaluated weekly
20-Nov	Riggs Spelling Assessment Tests	Monthly
20-Nov	Classroom Tests	Weekly
20-Nov	Formative Assessments	Evaluated weekly
4-Dec	Classroom Tests	Weekly
4-Dec	Formative Assessments	Evaluated weekly
11-Dec	Riggs Spelling Assessment Tests	Monthly
11-Dec	Classroom Tests	Weekly
11-Dec	Formative Assessments	Evaluated weekly
17-Dec	Singapore Placement Tests	Twice a year
17-Dec	DIBELS assessments	Twice a year
17-Dec	Core Knowledge assessments	Twice a year
17-Dec	Riggs Spelling Assessment Tests	Monthly
17-Dec	Classroom Tests	Weekly
17-Dec	Formative Assessments	Evaluated weekly
8-Jan	Classroom Tests	Weekly
8-Jan	Formative Assessments	Evaluated weekly
15-Jan	Classroom Tests	Weekly
15-Jan	Formative Assessments	Evaluated weekly
22-Jan	Classroom Tests	Weekly
22-Jan	Formative Assessments	Evaluated weekly
29-Jan	Classroom Tests	Weekly
29-Jan	Formative Assessments	Evaluated weekly
5-Feb	Classroom Tests	Weekly
5-Feb	Formative Assessments	Evaluated weekly
12-Feb	Classroom Tests	Weekly
12-Feb	Formative Assessments	Evaluated weekly
12-Feb	Riggs Spelling Assessment Tests	Monthly
19-Feb	Classroom Tests	Weekly
19-Feb	Formative Assessments	Evaluated weekly

Date	Assessment	Frequency
26-Feb	Classroom Tests	Weekly
26-Feb	Formative Assessments	Evaluated weekly
5-Mar	Classroom Tests	Weekly
5-Mar	Formative Assessments	Evaluated weekly
11-Mar	Riggs Spelling Assessment Tests	Monthly
11-Mar	Classroom Tests	Weekly
11-Mar	Formative Assessments	Evaluated weekly
26-Mar	Classroom Tests	Weekly
26-Mar	Formative Assessments	Evaluated weekly
1-Apr	Classroom Tests	Weekly
1-Apr	Formative Assessments	Evaluated weekly
9-Apr	Classroom Tests	Weekly
9-Apr	Formative Assessments	Evaluated weekly
16-Apr	Classroom Tests	Weekly
16-Apr	Formative Assessments	Evaluated weekly
16-Apr	Riggs Spelling Assessment Tests	Monthly
23-Apr	Classroom Tests	Weekly
23-Apr	Formative Assessments	Evaluated weekly
30-Apr	Classroom Tests	Weekly
30-Apr	Formative Assessments	Evaluated weekly
7-May	Classroom Tests	Weekly
7-May	Formative Assessments	Evaluated weekly
14-May	Classroom Tests	Weekly
14-May	Formative Assessments	Evaluated weekly
14-May	DIBELS assessments	Twice a year
14-May	Core Knowledge assessments	Twice a year
14-May	Riggs Spelling Assessment Tests	Monthly
14-May	Singapore Placement Tests	Twice a year
21-May	Classroom Tests	Weekly
21-May	Formative Assessments	Evaluated weekly

Estimates of Total Testing Time by Grade Level

Estimates of average time for administering state-required and district-required assessments by grade level.

Table F.3 NCA Testing Time

Grade Level	Statewide Assessments	School Assessments	Approximate Total Testing Time (In Minutes)
K	20	60	80
1	0	60	60
2	0	120	120
3	320	340	660
4	440	390	830
5	600	405	1,005
6	470	882	1,352

G. Proposed discipline policy or student code of conduct, if applicable.

Proposed Discipline Policy

Standards of Conduct

NCA will not only provide students with a solid academic foundation, but also will prepare students to be productive, responsible, caring citizens in a diverse society. Self-discipline and respect for others will permeate every aspect of school life. Clear, high standards of personal conduct, appearance, behavior, and attitude are necessary to the learning atmosphere of the school. These standards will enable the students' active imaginations and intellects to be guided in positive, productive ways. Students and staff of NCA will strive to learn the truth, do the good, and love the beautiful. The goals of discipline at the school are:

1. To maintain a highly effective learning environment where students focus on gaining knowledge with minimal distractions.
2. To view the need for discipline as a rich opportunity for students to learn about themselves and others, and to provide character education.
3. To reinforce the school's commitment to treating all students with fairness, respect, and equality.

Dress Code

NCA's dress code includes a school uniform. Students are required to be in uniform at school and at most school-related functions. A dress code has several functions: to enhance self-discipline by encouraging students to view their attire as an aspect of their work; to eliminate potential self-consciousness and social competition caused by fashion trends; and to foster a sense of school identity among the students.

Student Discipline Approach

The purpose of discipline is to create an effective learning environment. It promotes an atmosphere of civility and fosters respect for teachers, other students, school property, and private property. NCA's culture and curriculum will instill a positive sense of self in each student. While ensuring that negative behaviors receive negative consequences, NCA's discipline policy will be based on positive, proactive reinforcement of all that embraces the good, true, and beautiful. Providing clear, consistent standards, teaching students how to achieve those standards, and enforcing those standards consistently, logically, dispassionately, and wisely will encourage good behavior. This includes having relevant and effective consequences for misbehavior. Students must adhere to the general rules of the school and to each teacher's classroom rules.

Policies for Discipline, Suspension, and Expulsion

Disciplinary Action

Students are expected to abide by the agreement they sign at the start of each year to comply with the Code of Conduct. Consequences for misbehavior will be immediate, relevant, and effective. Teachers and administration will base consequences on whether the misbehavior is first time, repeated, or habitual.

Teachers will handle minor misbehavior in the classroom using age-appropriate classroom management techniques. These techniques could include "character card" systems, notes sent home to the student's parent(s) or guardian, and detention. If the teacher determines that a student's misbehavior is disrupting the effective learning environment of the classroom, the student will be given an office referral.

If a student's disruptive behavior requires an office referral, the teacher will issue a Discipline

Referral Form and the student will visit the principal or designee. The following actions will be taken according to the number of referrals. Referrals are cumulative throughout the school year.

- 1-2 The student is removed from class, visits the principal or designee, and a parent or guardian is contacted and must sign the Discipline Referral Form.
- 3 The student is removed from class, visits the principal or designee, a parent or guardian is contacted, and the student leaves for the day. The parent must sign the Discipline Referral Form.
- 4 The student is removed from class, visits the principal or designee, a parent or guardian is called, and the student leaves for the day. The student may not return without a parent or guardian attending school as an observer with the student for the entire day. This “reverse suspension” helps reinforce the home/school partnership for school behavior.
- 5 The student is removed from class, visits the principal or designee, a parent or guardian is called, and the student must attend detention.
 - May be restricted from participating in field trips or extracurricular activities.
 - Could also result in a one-day suspension from school.
- 6+ The student receives an automatic two-day suspension for each referral. The student is ineligible for any school awards or scholarships for the current school year, and a request may be made for expulsion from the school district.

Suspended students cannot be awarded honor roll for the current quarter. Students may be suspended for reasons other than receiving referrals, according to the Student Code of Conduct.

Note that ESE students’ out of school suspensions are limited to 10 days. The Collier County School District (CCPS) is the sole arbiter of expulsion. The school may only recommend expulsion of a student to CCPS. When students are expelled, they are expelled from CCPS, which includes the school.

Discipline Policy Roles

Administration

The school administration will preserve the integrity of the disciplinary process. By consistently treating students and their families with respect and professionalism, NCA’s administration will be a valuable part of the students’ character development and education. The primary goals of any consequence given by the administration is to have the student take responsibility for the infraction, develop greater insight and judgment, and grow in virtue and prudence. The goals of a parent conference will be to exchange complete and accurate information about the student, and to determine how the parents and school can best work together to reinforce the student’s good behavior.

Teachers

NCA’s philosophy is that the teacher's job is to teach. To this end, teachers will have the authority to implement discipline in their classrooms consistent with the school’s discipline goals. Whenever appropriate, teachers will refer students to the dean of students or designee for discipline, especially when discipline by the teacher would detract from the learning environment in the classroom.

Staff

Disciplinary procedures may also involve other designated school staff members. Designated staff members involved in disciplinary procedures will adhere to the school’s policies, and will consistently show civility, respect, and fairness to students and their families.

Governing Board

The board oversees the effective, faithful execution of the school's policies. In fulfilling this responsibility, the board as a whole will provide input and feedback to the school administration on school culture and discipline policy. The topic of school discipline will be included in parent surveys.

Rights of Students with Disabilities

NCA will abide by federal and state law in all disciplinary actions and proceedings involving students with disabilities.

Due Process for Suspension or Recommended Expulsion

NCA's disciplinary policies will always reflect the highest regard for each student's constitutional rights, and will safeguard each student's right to due process. Before a suspension or a recommended expulsion, the student and parent or guardian will receive notice (oral and written) explaining the infraction and all pertinent evidence. Before rendering a decision, the principal (or designee) will conduct an informal hearing with the student and parent or guardian, affording the student ample opportunity to explain the circumstances of the infraction. Every effort will be made to avoid suspension or a recommendation of expulsion by resolving the issue with assistance from the parent or guardian, unless the situation demands immediate suspension. If the principal's designee conducts the informal hearing, an appeal may be made to the principal. The principal's decision is final.

Informing Students and Parents of their Rights and Responsibilities

NCA's Family Handbook, issued upon admission and renewed at the beginning of each school year, will inform students and parents of their rights and responsibilities. Students and parents must sign an acknowledgement each year attesting to their agreement to abide by the policies. The Handbook will be available on the NCA website.

List of Offenses

A violation of any school rule will result in disciplinary action. Students are expected to behave appropriately and follow behavior expectations at all times while at school, during school activities, on the school bus, and at the school bus stop. Certain law violations or activities off campus may have consequences at the school.

Student disciplinary infractions and the responses to them are divided into five levels. Each level represents progressively more serious infractions, and responses to them become progressively more severe.

General

1. All infractions defined in this section of the code are prohibited behaviors.
2. All responses and sanctions that include removal from class will involve a parent contact.

Level 1

Level 1 infractions are relatively minor acts of misconduct that interfere with the orderly operation of the classroom, a school function, extracurricular/co-curricular program or approved transportation.

Level 1 Infractions

1. Disruption (level 1): Non-threatening activity that is not appropriate in a school setting,

such as engaging in loud or rough behavior that interferes with the safe and purposeful order of a school.

2. Inappropriate Location: Presence of the student in an unapproved location or during an unapproved time.
3. Tardy: Arrival to class after the designated starting time or after the tardy signal has sounded (cannot be given a suspension).
4. Other: Any other minor act of behavior which interferes with the orderly operation of the classroom, the school program, a school function or activity, an extracurricular activity or approved transportation.

Level 1 Responses and Sanctions

If a student commits a Level 1 infraction, the school administration shall take such action as deemed appropriate in the exercise of its judgment and discretion including, but not limited to:

Middle & High School*	Elementary*
Counseling and direction with the student.	Counseling and direction with the student.
Verbal reprimand/warning	Verbal reprimand/warning
Parental contact	Parental contact
Parent conference	Parent conference
Confiscation of item (with or without return to parent)	Confiscation of item (with or without return to parent)
Time out	Time out
Written apology	Written apology
Special work assignment	Special work assignment
Withdrawal of privileges which may include, but not be limited to, computer access, participation in extracurricular activities, bus riding privilege, and/or parking privileges, etc.	Withdrawal of privileges which may include, but not be limited to, computer access, participation in extracurricular activities, bus riding privilege, etc.
Return of property, payment for same (parent responsibility if a minor), or restitution for damages.	Return of property, payment for same (parent responsibility) or restitution for damages.
Behavior plan/contract	Behavior plan/contract
Lunch detention	Lunch detention
Detention (before or after school)	Detention (before or after school)
Extended Friday or Saturday detention (if available)	Referral to guidance.
In-school suspension (if available). Not to be used for attendance or tardiness.	Repeated infractions will be handled progressively and result in higher level consequences.
Referral to guidance.	Other school-based consequences as deemed appropriate by administration.

Middle & High School*	Elementary*
Repeated infractions will be handled progressively and result in higher level consequences.	Referral to MTSS team (3 referrals at ES level): referrals will result in a referral to the MTSS (Multi-Tiered System of Support) Team for a review of student success to make recommendations for interventions and supports.
Referral to MTSS team: referrals will result in a referral to the MTSS (Multi-Tiered System of Support) Team for a review of student success to make recommendations for interventions and supports.	Class change
Schedule change (if possible and appropriate)	

*The above response and sanctions are not listed in a specific or progressive order.

Level 2

Level 2 infractions are acts of misconduct that are more serious or disruptive than infractions in Level 1. Level 2 also includes repeated acts of Level 1 misconduct and acts directed against people or property that do not seriously endanger the health or safety of others.

Level 2 Infractions

1. Bullying (includes cyber) first infraction: Any intentional/malicious acts repeated with no provocation over time by a student or a group of students directed against another student(s) with the intent to ridicule, humiliate, or intimidate. To be defined as bullying, the behavior must be repeated, show imbalance of power, and be malicious in intent.
2. Cheating/Plagiarism: Willful or deliberate unauthorized use of the work of another person for academic purposes, or inappropriate use of notes or other material in the completion of an academic assignment or test. Students who assist others in the act of cheating by providing information or assistance may also face disciplinary action. In addition to corrective measures, the assignment, quiz, or test may be scored as 0.
3. Disrespect: Conduct or behavior which demeans, shames, irritates, humiliates, or embarrasses a person or group of persons.
4. Disrespect for Others' Property: Minor infractions involving property.
5. Disruption of Class: Conduct that interferes with the process of teaching/learning, or disrupts the orderly environment a learning environment.
6. Failure to Report: Failure to report to an office or area as designated by staff.
7. Dishonesty: Intentionally providing non-valid or misleading information or the withholding of valid information to a school system staff member.
8. Inappropriate Touching /Public Display of Affection (PDA): Engaging in clearly inappropriate contact not suitable in a school setting.
9. Leaving Class Without Permission: Leaving a classroom or educational experience without staff permission but remaining on the campus.
10. No Show to Detention: Failure to report as instructed by staff.
11. No Show to Extended Detention: Failure to report as instructed by staff.
12. No Show to In-School Suspension: Failure to report as instructed by staff.
13. No Show to Lunch Detention: Failure to report as instructed by staff.
14. Pornographic Materials: Possession of pornographic materials.
15. Profane, Obscene, Abusive Language or Materials: The use of oral or written language or the drawing of pictures or the use of photographs, videos, recordings that include weapons, racial slurs, gang-related/cult-related gestures or signs and objects or pictures, photographs, videos, recordings which are disrespectful or socially unacceptable and which tend to disrupt the orderly school environment, a school function or extracurricular/co-

curricular activity.

16. Skipping Class or School: Unauthorized absence from school and/or assigned class.
17. Theft (under \$50): Taking of property from a person without threat, violence, or bodily harm. Student is in possession of, has passed onto someone else, or is responsible for removing someone else's property. May lead to criminal proceedings.
18. Vandalism (under \$100): Purposeful destruction of property with a replacement or repair cost of less than \$100.00. May lead to criminal proceedings.
19. Vehicle Violation: Any misconduct that involves misuse of a vehicle. An example might include speeding on campus. May lead to law enforcement penalties.

Level 2 Responses and Sanctions

If a student commits a Level 2 infraction, the school administration may use any Level 1 response/sanction, and add Level II sanctions as deemed appropriate in the exercise of its judgment and discretion, including but not limited to:

Middle & High School*	Elementary*
Mediation	Paired with a mentor
Paired with a mentor	Community service
Community service	Safety assessment
Safety assessment	In-school suspension
Out-of-school suspension three days or less. Does not include attendance or skipping infractions.	Out-of-school suspension three days or less. Does not include attendance or skipping infractions.
Functional Behavior Assessment (FBA) and Behavior Intervention Plan if needed based on FBA.	Functional Behavior Assessment (FBA) and Behavior Intervention Plan if needed based on FBA.
Other school-based consequences as deemed appropriate by administration.	Other school-based consequences as deemed appropriate by administration.

*The above response and sanctions are not listed in a specific or progressive order.

Level 3

Level 3 infractions are major acts of misconduct. They include repeated misconduct acts from Level 2, serious disruptions of school order and threats to the health, safety and property of others. A student who commits a Level 3 infraction may also be subject to criminal proceedings.

Level 3 Infractions

1. Ammunition Possession: Possession of any projectiles together with their fuses, propelling charges, and primers that are fired from guns.
2. Assault on Employee (non-SESIR): An intentional threat on an employee (to include all NCA staff) by word or act to do violence to another person, coupled with an apparent ability to do so, or doing some act that creates a well-founded fear in another person that such violence is imminent without subjecting him or her to physical attack.
3. Assault on Student (non-SESIR): An intentional threat on a student by word or act to do violence to another person, coupled with an apparent ability to do so, or doing some act that creates a well-founded fear in another person that such violence is imminent without subjecting him or her to physical attack.
4. Attempt to Fight: Threat by word or act to fight with one or more other students, or inciting others to fight, either of which may include minor physical contact.
5. Computer/Technology (major): Misuse of a computer/technology with malicious intent. Examples may include — system hacking or making unauthorized changes to operating systems, breaking into restricted accounts or networks, modifying or destroying files without permission, illegally copying software, etc.
6. Defiance/Insubordination: Refusal or failure to comply with a direction or an order from a staff member. Failure to comply with state law, NCA school board policy, behavior contracts, or classroom rules.
7. Disruption (level 3): Conduct or behavior which interferes with or disrupts the teaching and learning process, the orderly process of the school environment, a school function, or extracurricular or co-curricular activity including amorous physical contact and inappropriate displays of affection.
8. Excessive Referrals: Three or more referrals in a five-day period.
9. Extortion: Willful or malicious threats of harm, injury, or violence to the person, property, or reputation of another with the intent to obtain money, information, services, or items of material worth.
10. False Accusation Against Staff: Making any claim that is unfounded and may jeopardize the person's professional reputation.
11. False or Misleading Information (including but not limited to forgery): Making of a false or misleading communication, whether orally, in writing, or by other medium, to a school staff member with either the intent to deceive the staff member or under circumstances which would be reasonably calculated to deceive the staff member, but without intending or causing any person to be deprived of property or possessions. (e.g., forging parent's name). Intentionally providing non-valid or misleading information or the withholding of valid

information to a school system staff member.

12. Fighting (non-SESIR): Two or more individuals participating in physical conflict with both parties engaged. Applies when there is no injury AND engaged party stops on verbal command.
13. Fireworks: Unauthorized possession and/or igniting of fireworks or firecrackers.
14. Gambling: The act of playing a game for financial gain. May be reported to SESIR as Other Major Misconduct.
15. Hit/Striking: A non-mutual physical contact with malicious intent, but without injury to the victim.
16. Illegal/ Secret Organizations: Establishing, joining or participating in the initiation to any group that is not approved by school administration (including a —criminal street gang as defined by section 874.03 FS) on school system property, at a school function or extracurricular activity.
17. Inciting Others: The willful act of inciting, leading or participating in any disruption or disturbance which interferes with the educational process or which can result in damage or destruction to public or private property or cause personal injury to participants and others.
18. Indecent Exposure: To be naked or otherwise exhibit or exposure of sexual organs, buttocks or breasts.
19. No Show to Friday or Saturday Detention: Failure to report as instructed by staff.
20. Non-Prescription Drug Possession/Use: Possession of any medication, other than prescription medication. Examples might include cold medications, pain medication, etc.
21. Off-Campus Felony: Any charging affidavit listing a felony crime for a student will be reviewed to determine if the student's presence may have an adverse effect on the school environment. (Florida Statute 1006.09)
22. Possession of Contraband Materials: Possession, use and/or distribution of materials or items which are forbidden at school include but are not limited to matches, lighters, ammunition, fireworks and lasers. Contraband shall be confiscated and may not be returned to student. Possession of a common pocketknife or other item that is not designed or constructed for use as an offensive weapon may be considered under this heading even if:
 - a. there has been no threatening or intimidating display of the item;
 - b. the item does not constitute a —concealed weapon as defined in Section 790.001(3), Florida Statutes;
 - c. the item is not a gun or firearm of any type, and
 - d. no criminal charge is filed against the student as a result of the incident being reported to and investigated by law enforcement, as required by this code.
23. Possession of a Pocket Knife: Possession of a knife without intent. These knives are typically expected to be four inches or smaller when closed and have a hinged blade that closes into a covering, without a locking mechanism to keep the blade secured in an open position.
24. Possession of a Stolen Item: Possession of an item stolen by someone else.

25. Profanity to School Employees: Any use of profanity directed at any NCA staff member.
26. Sexting: Sending, or receiving any inappropriate texts, emails, messages, photos, etc. of a sexual nature.
27. Social Media (major): Use of social media with malicious intent.
28. Theft (\$50-\$300): Stealing of an item or possession of an item stolen by someone else.
29. Threat to Harm Employee (non-criminal): Making a verbal or written statement which does not meet the criteria of criminal assault. A low-level threat that poses minimal risk to the victim and public safety. The threat is vague and indirect; the information contained in the threat is implausible or seems unlikely to be carried out.
30. Threat to Property of Staff: Threat to harm property of a staff member. Examples might be written or verbal threats made directly to the staff member or shared with other students or staff. This could include a threat to a staff member's car or break into a home.
31. Unsafe Act: Endangering the safety of oneself or others.
32. Vandalism (\$100-\$1000): Malicious destruction of property with a repair or replacement value of between \$100.00 - \$1000.00.
33. Violation of the Parent Contract

Level 3 Responses and Sanctions

If a student commits a Level 3 infraction, the school administration may use any Level 1 or 2 response/sanctions, and add Level 3 sanctions as deemed appropriate in the exercise of its judgment and discretion, including but not limited to:

Middle & High School*	Elementary*
Community service	Community service
Diversity assignment	Diversity assignment
Referred for counseling	Referred for counseling
Tier 3 Intervention (initiation or modification)	Tier 3 Intervention (initiation or modification)
Out-of-school suspension five days or less	Out-of-school suspension five days or less
Alternative placement	

*The above response and sanctions are not listed in a specific or progressive order.

Level 4

Level 4 acts of misconduct are serious. All infractions must be reported to the Student Services Department. A student who commits a Level 4 infraction may or may not be reported to law enforcement and may be subject to criminal proceedings. Level 4 infractions must be coded into data using SESIR (School Environmental Safety Incident Reporting (<http://www.fl DOE.org/safe-schools/sesir-discipline-data>) codes for data collection by the Florida Department of Education.

The definitions of these events are provided directly by the FLDOE.

Level 4 Infractions (SESIR)

1. Alcohol Possession/Use/Sale (ALC) (FS562.111): Possession, sale, purchase, or use of alcoholic beverages. Use means the person is caught in the infraction of using, admits to use or is discovered to have used in the course of an investigation. Students are suspended for ten (10) days, and assigned to the alternative school.
2. Arson (ARS) (FS 806.01): Intentionally setting a fire that does not result in bodily injury on school property: to damage or cause to be damaged, by fire or explosion, any dwelling, structure, or conveyance, whether occupied or not, or its contents. All fires are reported to authorities so they can be investigated for intent. Report only intentionally-set fires to SESIR.
3. Battery with Injury (BAT) (FS 784.081): Physical attack/harm. The physical use of force or violence by an individual against another. The attack must be serious enough to warrant consulting law enforcement and result in more serious bodily injury. (To distinguish from fighting, report an incident as battery only when the force or violence is carried out against a person who is not fighting back.)
4. Breaking and Entering/Burglary (BRK) (FS 810.02): Illegal entry into a facility. Unlawful entry with force, or unauthorized presence in a building or other structure or conveyance with evidence of the intent to damage or remove property or harm a person(s).
5. Bullying (repeated) (BUL) (FS1006.147; NCA Policy 4.3.9): Intimidating behaviors. Systematically and chronically inflicting physical hurt or psychological distress on one or more students or employees that is severe or pervasive enough to create an intimidating, hostile, or offensive environment; or unreasonably interfere with the individual's school performance or participation.
 - a. Bullying is further defined as unwanted and repeated written, verbal or physical behavior, including any threatening, insulting or dehumanizing gesture by a student that is severe or pervasive enough to create an intimidating, hostile or offensive educational environment; cause severe discomfort or humiliation; or unreasonably interfere with the individual's school performance or participation and may involve but is not limited to: teasing, social exclusion, threat, intimidation, stalking, cyber stalking*, physical violence, theft, sexual, religious or racial harassment, public humiliation and destruction of property. Bullying includes cyber-bullying and cyber-stalking. Cyber bullying means bullying using technology or any electronic communication, which includes, but not limited to, any transfer of signs, signals, writing, images, sounds, data, or intelligence of any nature transmitted in whole or in part by a wire, radio, electromagnetic system, photo-electronic system, or photo optical system, including but not limited to, electronic mail, Internet communications, instant

messages, or facsimile communications. Cyber bullying includes the creation of a webpage or weblog in which the creator assumes the identity of another person, or impersonation of another person as the author or posted content or messages, if the creation or impersonation creates any of the conditions enumerated in the definition of bullying. Cyber bullying also includes the distribution by electronic means of a communication to more than one (1) person or the posting of material on an electronic medium that may be accessed by one (1) or more persons, if the distribution or posting creates any of the conditions enumerated in the definition, of bullying.

- i. *Cyber stalking means to engage in a course of conduct to communicate words, images, or language by or using electronic mail or electronic communication, directed at a specific person, causing substantial emotional distress to that person and serving no legitimate purpose.
6. Disruption/Disorderly Conduct (DOC) (FS790.162 and 790.163): Major disruption of all or a significant portion of campus activities, school-sponsored events, and school bus transportation. Disruptive behavior that poses a serious threat to the learning environment, health, safety, or welfare of others. Example: bomb threat, inciting a riot, initiating a false fire alarm. (Do not use this code for students defying authority, disobeying or showing disrespect to others, using inappropriate language or gestures, or classroom disruption.)
7. Drug Sale/Distribution (excluding alcohol) (DRD) (FS 577.111 and 893.147): Illegal sale or distribution of drugs. The manufacture, cultivation, sale, or distribution of any drug, narcotic, controlled substance or substance represented to be a drug, narcotic, or controlled substance, including false substance used as a drug. Students are suspended for ten (10) days, assigned to the alternative school.
8. Drug Use/Possession (DRU) (FS 499.03) (excluding alcohol): (illegal drug possession or use) The use or possession of any drug, narcotic, controlled substance, or any substance when used for chemical intoxication. Use means the person is caught in the act of using, admits to use or is discovered to have used in the course of an investigation. Students are suspended for ten 10 days and assigned to the alternative school.
9. Fighting (FIT): Mutual combat, mutual altercation. When two or more persons mutually participate in use of force or physical violence that requires either 1) physical restraint or 2) results in injury requiring first aid or medical attention. (Does not include lower level fights involving pushing, shoving, or altercations that stop upon verbal command.)
10. Harassment (HAR) (FS 1006.147 and NCA Policy 4.3.9): Insulting behaviors. Any threatening, insulting, or dehumanizing gesture, use of data or computer software, or written, verbal, or physical conduct that 1) places a student or school employee in reasonable fear of harm to his or her person or damage to his or her property, 2) has the effect of substantially interfering with a student's educational performance, opportunities, or benefits, or 3) has the effect of substantially disrupting the orderly operation of a school including any course of conduct directed at a specific person that causes substantial emotional distress in such a person and serves no legitimate purpose.
11. Hazing (HAZ) (FS 1006.135): Any action or situation that recklessly or intentionally endangers the mental or physical health or safety of a student for the purpose of initiation or admission

into or affiliation with any organization operating under the sanction of a postsecondary institution. Such term includes, but is not limited to, any brutality of a physical nature, such as whipping, beating, branding, forced calisthenics, exposure to the elements, forced consumption of any food, liquor, drug, or other substance, or other forced physical activity which could adversely affect the physical health or safety of the student, and also includes any activity which would subject the student to extreme mental stress, such as sleep deprivation, forced exclusion from social contact, forced conduct which could result in extreme embarrassment, or other forced activity which could adversely affect the mental health or dignity of the student. Hazing may consist of activities that occur on or off school grounds.

12. Other Major Infractions (OMC): Major incidents that do not fit within the other definitions. Any serious, harmful incident resulting in the need for law enforcement intervention not previously classified. Examples: student producing or knowingly using counterfeit money, participating in gambling activities, possessing child pornography, or possessing drug paraphernalia.
13. Physical Attack (PHA): An actual and intentional striking of another person against his/her will, or the intentional causing of bodily harm to an individual.
14. Robbery ROB (FS 812.13(1)): Using force to take something from another. The taking or attempted taking of anything of value that is owned by another person or organization, under the confrontational circumstances of force, or threat of force or violence, and/or by putting the victim in fear.
15. Sexual Harassment (SXH): Undesired sexual behavior. Unwanted verbal or physical behavior with sexual connotations by an adult or student that is severe or pervasive enough to create an intimidating, hostile or offensive educational environment, cause discomfort or humiliation or unreasonably interfere with the individual's school performance or participation. An incident when one person demands a sexual favor from another under the threat of physical harm or adverse consequence.
16. Sexual Infractions (other) (SXO) (FS 800): Lewdness, indecent exposure. Other sexual contact, including intercourse, without force or threat of force. Subjecting an individual to lewd sexual gestures, sexual activity, or exposing private body parts in a lewd manner. (Law enforcement must be notified to investigate.)
17. Theft/Larceny over \$300 (STL) (FS 812.014 and 812.061): Taking of property from a person, building, or a vehicle. The unauthorized taking, carrying, riding away with, or concealing the property of another person, including motor vehicles, without threat, violence, or bodily harm.
18. Tobacco/Electronic (TBC): Cigarettes or other forms of tobacco. The possession, use, distribution, or sale of tobacco or nicotine products on school grounds, at school-sponsored events, or on school transportation by any person under the age of 18. Includes e-cigarettes and vapor products.
19. Trespassing (TRS) (FS 810.08): Illegal entry onto campus. To enter or remain on school grounds/campus, school transportation, or at a school-sponsored event/off campus, without authorization or invitation and with no lawful purpose for entry.

20. Threat/Intimidation (TRE) (FS 836.05): Instilling fear in others. A threat to cause physical harm to another person with or without the use of a weapon that includes all of the following elements: 1) intent - an intention that the threat is heard or seen by the person who is the object of the threat; 2) fear - a reasonable fear or apprehension by the person who is the object of the threat that the threat could be carried out; and 3) capability - the ability of the offender to actually carry out the threat directly or by a weapon or other instrument that can easily be obtained.
21. Vandalism (over \$1,000) (VAN) (FS 806.13): Destruction, damage, or defacement of school or personal property. The intentional destruction, damage, or defacement of public or private/personal property without the consent of the owner or the person having custody or control of it

Level 4 Responses and Sanctions

If a student commits a Level 4 infraction, the school administration may use any Level 1, 2 or 3 response/sanctions, and add Level 4 sanctions as deemed appropriate in the exercise of its judgment and discretion, including but not limited to:

Middle & High School*	Elementary*
Out-of-school suspension up to 10 days	Out-of-school suspension up to 10 days
Alternative school placement	Alternative school placement

*The above response and sanctions are not listed in a specific or progressive order.

Level 5

Middle & High School Students: For the following infractions a student will be suspended for a minimum of 10 days, recommended for expulsion. The student will also be reported to law enforcement for prosecution. NOTE: Elementary students may receive the same consequences; however, all discipline recommendations will be reviewed at the school and district prior to final decisions being made.

In accordance with the requirements of Florida Statute FS 1006.13, the School Board of NCA has adopted a policy of zero tolerance with regard to school violence, possession or use of weapons and other crime(s) as part of a comprehensive approach to reducing school violence and crime. The recommendation of expulsion is mandatory for the following offenses committed at any time this code applies:

1. Homicide (HOM) (FS 782.04 and 782.07): Murder, manslaughter. The unjustified killing of one human being by another.
2. Sexual Battery (SXB) (FS 794.011): Sexual battery is a serious forced or attempted sexual act as specified in section 794.011, Florida Statutes.
3. Sexual Assault (SXA) (FS 776.08): An incident that includes threat of rape, fondling, indecent liberties, child molestation, or sodomy. Both males and females can be victims of sexual assault. The threat must include all the following elements: 1) intent - an intention that the

threat is heard or seen by the person who is the object of the threat; 2) fear - a reasonable fear or apprehension by the person who is the object of the threat that the threat could be carried out; and 3) capability - the ability of the offender to actually carry out the threat directly or by a weapon or other instrument that can easily be obtained.

4. Armed Robbery (ROB) (FS 812.13(2a,b)) Using force to take something from another. The taking or attempted taking of anything of value that is owned by another person or organization, under the confrontational circumstances of force, or threat of force or violence, and/or by putting the victim in fear. If in the course of committing the robbery the offender carried a firearm or other weapon.
5. Battery or aggravated battery on a teacher or other school personnel (BAT) (FS 784.081).
6. Kidnapping (KID) (FS 776.08): Abduction of an individual. Forcibly, or by threat, confining, abducting, or imprisoning another person against his/her will and without lawful authority.
7. Arson (ARS) (FS 806.031): Intentionally setting fire on school property when bodily injury is involved. To damage or cause to be damaged, by fire or explosion, any dwelling, structure, or conveyance, when there is bodily injury. Note: Arson is a "Violent Incident if it Results in Bodily Injury" and must be reported in the related element "Injury-Related". All fires are reported to authorities so they can be investigated for intent. Report only intentionally-set fires to SESIR.
8. Weapon - Firearm Possession/Other Weapons (WPO) (NCA Policy 6.12): Possession of firearms and other instruments that can cause harm. Possession of any instrument or object, as defined by Section 790.001, Florida Statutes, or district Code of Student Conduct that can inflict serious harm on another person or that can place a person in reasonable fear of serious harm. (Possession of a common pocketknife is exempted from state zero tolerance expulsion requirement F.S.1006.07(2); however, law enforcement should be notified of any weapon or knife, including pocketknives, for investigation.)
9. Threat to throw, project, place, or discharge any destructive device,. - It is unlawful for any person to threaten to throw, project, place, or discharge any destructive device with intent to do bodily harm to any person or with intent to do damage to any property of any person, and any person convicted thereof commits a felony of the second degree (FS790.162).
10. False report concerning planting a bomb, an explosive, or a weapon of mass destruction, or concerning the use of firearms in a violent manner; —It is unlawful for any person to make a false report, with intent to deceive, mislead, or otherwise misinform any person, concerning the placing or planting of any bomb, dynamite, other deadly explosive, or weapon of mass destruction as defined in FS 790.166, or concerning the use of firearms in a violent manner against a person or persons. A person who violates this subsection commits a felony of the second degree (FS 790.162 and 790.163).

H. Articles of Incorporation

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August 19, 2019

FLORIDA DEPARTMENT OF STATE
Division of Corporations

PHOENIX EDUCATION NETWORK, INC
2390 TAMiami TRAIL NORTH, SUITE 108
NAPLES, FL 34103

The Articles of Incorporation for PHOENIX EDUCATION NETWORK, INC were filed on August 8, 2019, and assigned document number N19000008719. Please refer to this number whenever corresponding with this office.

Enclosed is the certification requested. To be official, the certification for a certified copy must be attached to the original document that was electronically submitted and filed under FAX audit number H19000236760.

To maintain "active" status with the Division of Corporations, an annual report must be filed yearly between January 1st and May 1st beginning in the year following the file date or effective date indicated above. It is your responsibility to remember to file your annual report in a timely manner.

A Federal Employer Identification Number (FEI/EIN) will be required when this report is filed. Apply today with the IRS online at:

<https://sa.www4.irs.gov/modiein/individual/index.jsp>.

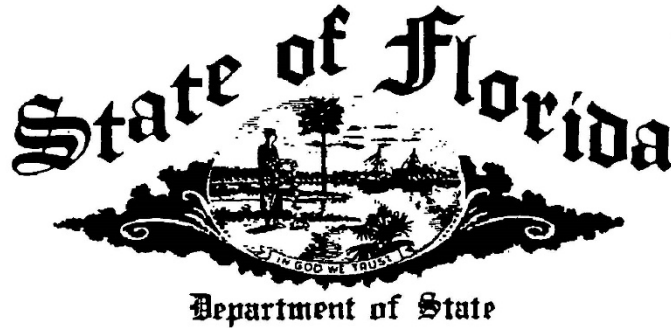
Please be aware if the corporate address changes, it is the responsibility of the corporation to notify this office.

Should you have questions regarding corporations, please contact this office at (850) 245-6052.

Neysa Culligan
Regulatory Specialist II
New Filings Section
Division of Corporations

Letter Number: 619A00017110

P.O BOX 6327 - Tallahassee, Florida 32314



I certify the attached is a true and correct copy of the Articles of Incorporation of PHOENIX EDUCATION NETWORK, INC, a Florida corporation, filed on August 8, 2019, as shown by the records of this office.


I further certify the document was electronically received under FAX audit number H19000236760. This certificate is issued in accordance with section 15.16, Florida Statutes, and authenticated by the code noted below

The document number of this corporation is N19000008719.

Authentication Code: 619A00017110-081919-N19000008719-1/1



Given under my hand and the
Great Seal of the State of Florida,
at Tallahassee, the Capital, this the
Nineteenth day of August, 2019


Secretary of State

((H19000236760 3)))

**ARTICLES OF INCORPORATION
OF
PHOENIX EDUCATION NETWORK, INC.
(a Florida Corporation Not for Profit)**

**ARTICLE I
NAME**

The name of this corporation is PHOENIX EDUCATION NETWORK, INC., (hereinafter called the "Corporation").

**ARTICLE II
PURPOSES**

The Corporation is organized exclusively for charitable and educational purposes, including for such purposes, the making of distributions to organizations that qualify as exempt organizations under §§170(b)(1)(A)(ii), 501(c)(3) and 509(a)(1) of the Internal Revenue Code of 1986, as amended, or corresponding section of any future federal tax code ("Code").

The initial purposes of the Corporation are to Organize and Operate a Charter School under Chapter 1002 of the Florida Statutes and the relevant provisions of Chapters 1000 through 1013 of the Florida Statutes applicable to Charter Schools.

**ARTICLE III
NECESSARY POWERS**

The Corporation shall have the power to acquire, own, maintain and use its assets for the purposes for which it is organized; to raise funds by any legal means for the encouragement of its purposes; to acquire, hold, own, use and dispose of real or personal property in connection with the purposes of the Corporation; and to exercise all powers necessary or convenient to the furtherance of the purposes for which the Corporation is organized; and to exercise all powers granted to a Corporation not for profit operating as a Charter School under Florida law.

**ARTICLE IV
MANAGEMENT**

Management of the Corporation shall be vested in the Corporation's Board of Directors. There shall be not less than three (3) and not more than nine (9) voting directors. Initially there shall be three (3) voting directors. Additional voting directors may be added up to Nine (9) at the discretion of the Board in accordance with the Bylaws.

The Board of Directors may appoint and remove one or more non-voting directors to assist in the management of the Corporation.

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Page 1*

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((H19000236760 3)))

ARTICLE V
INITIAL VOTING DIRECTORS

The initial voting directors of the Corporation shall be:

Matthew W. Mathias, Chair
2025 Merlin Court
Naples, Florida 34105

Timothy Hall, Vice Chair
2376 Terra Verde Lane
Naples, Florida 34105

William Truog, Treasurer
3330 Glen Cairn Drive, #201
Bonita Springs, Florida 34134

Directors shall be elected as provided in the Bylaws.

ARTICLE VI
MEMBERSHIP

The Corporation shall have no members with voting rights or interests in the current or residual income or assets of the Corporation.

The Corporation in accordance with its Bylaws may but shall not be required to establish one or more classes of non-voting membership which shall have no rights to the current or residual income or assets of the Corporation.

ARTICLE VII
DISSOLUTION

Upon the dissolution of the Corporation, the assets of the Corporation shall be distributed at the sole discretion of the Board of Directors to carry out or support exempt purposes within the meaning of §§170(b)(1)(A)(ii), 501(c)(3) and 509(a)(1) of the Code. Any such assets not so disposed of, shall be disposed of by a Florida court of competent jurisdiction of the county in which the principal office of the Corporation is then or was last located. The Court shall distribute such assets to or for such educational purposes or to such educational organization or organizations, as said court shall determine, which is (are) organized and operated exclusively for educational purposes in the same or similar manner to the Corporation.

ARTICLE VIII
PROHIBITED ACTIVITIES

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to its Directors, officers, or other private persons, except that the Corporation shall

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Page 2

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be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II hereof.

No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office or engage in political activities of any kind.

Notwithstanding any other provision of these Articles, the Corporation shall not conduct or carry on any other activities not permitted to be carried on (a) by a Corporation exempt from federal income tax under §501(c)(3) of the Code, or (b) by a Corporation, contributions to which are deductible under §§170(c)(2), 2055, 2100(a)(2) and 2522 of the Code.

In the event that the Corporation shall be considered to be a private foundation, as such term is defined in §509(a) of the Code, then in that event, the Corporation:

A. shall distribute its income for each tax year at such time and in such manner as not to become subject to the tax on undistributed income imposed by §4942 of the Code; and,

B. shall not (i) engage in any act of self-dealing as defined in § 4941(d) of the Code; (ii) retain any excess business holdings as defined in § 4943(c) of the Code; (iii) make any investments in such manner as to subject it to tax under § 4944 of the Code; or (iv) make any taxable expenditures as defined in § 4945(d) of the Code.

ARTICLE XI **NONDISCRIMINATION POLICY**

The Corporation will admit students without regard to race, color, national and/or ethnic origin. All students shall have the same rights, privileges, programs, and activities generally accorded or made available to students at the school. The Corporation will not discriminate on the basis of race in administration of its educational policies, admissions policies, scholarship and loan programs, and athletic and other Corporation administered programs. The Corporation is aware of the requirements of Rev. Proc. 75-50 and Rev. Rul. 71-447 and will comply with their requirements.

ARTICLE XII **AMENDMENT OF BYLAWS**

Except as provided by these Articles and by the Bylaws, the Corporation's Bylaws may be amended, altered, restated or repeated and new Bylaws may be adopted only by the affirmative vote of two thirds (2/3) of the members of the Board of Directors. The Bylaws may contain any provisions for the regulation and management of the affairs of the Corporation not inconsistent with Florida law or the Articles of Incorporation.

Articles of Incorporation of Phoenix Education Network, Inc.
Page 3

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ARTICLE XIII
AMENDMENT OF ARTICLES OF INCORPORATION

Except as otherwise provided in these Articles, these Articles of Incorporation may be amended, altered and/or restated only by the affirmative vote of two thirds (2/3) of the members of the Board of Directors.

ARTICLE XIV
REGISTERED AGENT AND REGISTERED AGENT ADDRESS

The street address of the Corporation's registered office in the State of Florida is, 2150 Goodlette Road North, Sixth Floor, Naples, Florida 34102 and the name of its registered agent at such office is Wood, Buckel and Carmichael, PLLC

ARTICLE II
**PRINCIPAL ADDRESSES OF
THE CORPORATION AND INCORPORATOR**

The Corporation's principal office and mailing address are located at 2390 Tamiami Trail North, Suite 108, Naples, Florida 34103.

The sole incorporator of the Corporation is Kevin Carmichael. The complete business address of the sole incorporator is c/o Wood, Buckel and Carmichael, PLLC, 2150 Goodlette Road North, Sixth Floor, Naples, Florida 34102.

ARTICLE XV
EFFECTIVE DATE

The effective date of these Articles shall be August 9, 2019.

IN WITNESS WHEREOF, the undersigned incorporator has executed these Articles of Incorporation on the 9 day of August, 2019.

I submit this document and affirm that the facts stated herein are true. I am aware that the false information submitted in a document to the department of State constitutes a third-degree felony as provided for in s. 817.153



Kevin Carmichael, Incorporator

((H19000236760 3)))

((H19000236760 3))

**CERTIFICATE OF DESIGNATION OF REGISTERED OFFICE AND
REGISTERED AGENT**

PURSUANT TO THE PROVISIONS OF SECTIONS 48.091 and 607.0501, FLORIDA STATUTES, THE UNDERSIGNED CORPORATION SUBMITS THE FOLLOWING STATEMENT IN DESIGNATING THE REGISTERED OFFICE/REGISTERED AGENT, IN THE STATE OF FLORIDA

The name of the Corporation is PHOENIX EDUCATION NETWORK, INC.

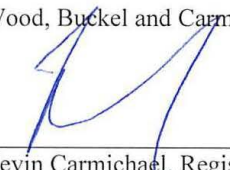
The name of the initial registered agent of the Corporation is Wood, Buckel and Carmichael, PLLC, 2150 Goodlette Road North, Sixth Floor, Naples, Florida 34102.

REGISTERED AGENT ACCEPTANCE

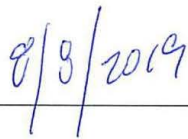
Having been named as registered agent and to accept service of process for the above stated Corporation at the place designated in this certificate, I hereby accept the appointment as registered agent and agree to act in that capacity. I further agree to comply with the provisions of all statutes relating to the proper and complete performance of my duties, and I am familiar with and accept the obligations of my position as registered agent.

Wood, Buckel and Carmichael, PLLC

By:


Kevin Carmichael, Registered Agent

Date:



((H19000236760 3))

I. 501(c)(3) tax-exempt status determination letter (or copy of the filing form)

Form 1023 <small>(Rev. December 2017) Department of the Treasury Internal Revenue Service</small>	Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code ▶ Do not enter social security numbers on this form as it may be made public. ▶ Go to www.irs.gov/Form1023 for instructions and the latest information.	<small>OMB No. 1545-0056</small> Note: If exempt status is approved, this application will be open for public inspection.
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Use the instructions to complete this application and for a definition of all **bold** items. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500. Visit our website at www.irs.gov for forms and publications. If the required information and documents are not submitted with payment of the appropriate user fee, the application may be returned to you.

Attach additional sheets to this application if you need more space to answer fully. Put your name and EIN on each sheet and identify each answer by Part and line number. Complete Parts I – XI of Form 1023 and submit only those Schedules (A through H) that apply to you.

Part I Identification of Applicant

1 Full name of organization (exactly as it appears in your organizing document)	2 c/o Name (if applicable)
Phoenix Education Network, Inc.	d/b/a Naples Classical Academy
3 Mailing address (Number and street) (see instructions)	4 Employer Identification Number (EIN)
2390 Tamiami Trail North, Suite 108	84-2776904
City or town, state or country, and ZIP + 4	5 Month the annual accounting period ends (01 – 12)
Naples, FL 34103	06
6 Primary contact (officer, director, trustee, or authorized representative)	b Phone:
a Name:	239-287-6287
Erika Donalds	c Fax: (optional)
7 Are you represented by an authorized representative, such as an attorney or accountant? If "Yes," provide the authorized representative's name, and the name and address of the authorized representative's firm. Include a completed Form 2848, <i>Power of Attorney and Declaration of Representative</i> , with your application if you would like us to communicate with your representative.	
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
8 Was a person who is not one of your officers, directors, trustees, employees, or an authorized representative listed in line 7, paid, or promised payment, to help plan, manage, or advise you about the structure or activities of your organization, or about your financial or tax matters? If "Yes," provide the person's name, the name and address of the person's firm, the amounts paid or promised to be paid, and describe that person's role.	
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
9a Organization's website: naplesclassical.org	
b Organization's email: (optional)	
10 Certain organizations are not required to file an information return (Form 990 or Form 990-EZ). If you are granted tax-exemption, are you claiming to be excused from filing Form 990 or Form 990-EZ? If "Yes," explain. See the instructions for a description of organizations not required to file Form 990 or Form 990-EZ.	
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
11 Date incorporated if a corporation, or formed, if other than a corporation. (MM/DD/YYYY) 04 / 02 / 2019	
12 Were you formed under the laws of a foreign country ? If "Yes," state the country.	
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

For Paperwork Reduction Act Notice, see instructions. Cat. No. 17133K **Form 1023** (Rev. 12-2017)

Part II Organizational Structure

You must be a corporation (including a limited liability company), an unincorporated association, or a trust to be tax exempt. See instructions. **DO NOT file this form unless you can check "Yes" on lines 1, 2, 3, or 4.**

- 1** Are you a **corporation**? If "Yes," attach a copy of your articles of incorporation showing **certification of filing** with the appropriate state agency. Include copies of any amendments to your articles and be sure they also show state filing certification. ☒ **Yes** ☐ **No**
- 2** Are you a **limited liability company (LLC)**? If "Yes," attach a copy of your articles of organization showing certification of filing with the appropriate state agency. Also, if you adopted an operating agreement, attach a copy. Include copies of any amendments to your articles and be sure they show state filing certification. Refer to the instructions for circumstances when an LLC should not file its own exemption application. ☐ **Yes** ☒ **No**
- 3** Are you an **unincorporated association**? If "Yes," attach a copy of your articles of association, constitution, or other similar organizing document that is dated and includes at least two signatures. Include signed and dated copies of any amendments. ☐ **Yes** ☒ **No**
- 4a** Are you a **trust**? If "Yes," attach a signed and dated copy of your trust agreement. Include signed and dated copies of any amendments. ☐ **Yes** ☒ **No**
- b** Have you been funded? If "No," explain how you are formed without anything of value placed in trust. ☐ **Yes** ☒ **No**
- 5** Have you adopted **bylaws**? If "Yes," attach a current copy showing date of adoption. If "No," explain how your officers, directors, or trustees are selected. ☒ **Yes** ☐ **No**

Part III Required Provisions in Your Organizing Document

The following questions are designed to ensure that when you file this application, your organizing document contains the required provisions to meet the organizational test under section 501(c)(3). Unless you can check the boxes in both lines 1 and 2, your organizing document does not meet the organizational test. **DO NOT file this application until you have amended your organizing document.** Submit your original and amended organizing documents (showing state filing certification if you are a corporation or an LLC) with your application.

- 1** Section 501(c)(3) requires that your organizing document state your exempt purpose(s), such as charitable, religious, educational, and/or scientific purposes. Check the box to confirm that your organizing document meets this requirement. Describe specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document. Refer to the instructions for exempt purpose language. ☒
Location of Purpose Clause (Page, Article, and Paragraph): **Page 1, Article II**
- 2a** Section 501(c)(3) requires that upon dissolution of your organization, your remaining assets must be used exclusively for exempt purposes, such as charitable, religious, educational, and/or scientific purposes. Check the box on line 2a to confirm that your organizing document meets this requirement by express provision for the distribution of assets upon dissolution. If you rely on state law for your dissolution provision, do not check the box on line 2a and go to line 2c. ☒
- b** If you checked the box on line 2a, specify the location of your dissolution clause (Page, Article, and Paragraph). Do not complete line 2c if you checked box 2a. **Page 2, Article VII**
- c** See the instructions for information about the operation of state law in your particular state. Check this box if you rely on operation of state law for your dissolution provision and indicate the state: ☐

Part IV Narrative Description of Your Activities

Using an attachment, describe your *past, present, and planned* activities in a narrative. If you believe that you have already provided some of this information in response to other parts of this application, you may summarize that information here and refer to the specific parts of the application for supporting details. You may also attach representative copies of newsletters, brochures, or similar documents for supporting details to this narrative. Remember that if this application is approved, it will be open for public inspection. Therefore, your narrative description of activities should be thorough and accurate. Refer to the instructions for information that must be included in your description.

Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors

- 1a** List the names, titles, and mailing addresses of all of your officers, directors, and trustees. For each person listed, state their total annual **compensation**, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter "none" if no compensation is or will be paid. If additional space is needed, attach a separate sheet. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
See attachment.			

Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)

- b** List the names, titles, and mailing addresses of each of your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation. Do not include officers, directors, or trustees listed in line 1a.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)

- c** List the names, names of businesses, and mailing addresses of your five highest compensated **independent contractors** that receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)

The following "Yes" or "No" questions relate to *past, present, or planned* relationships, transactions, or agreements with your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, and 1c.

- 2a** Are any of your officers, directors, or trustees **related** to each other through **family or business relationships**? If "Yes," identify the individuals and explain the relationship. ☐ Yes ☒ No

- b** Do you have a business relationship with any of your officers, directors, or trustees other than through their position as an officer, director, or trustee? If "Yes," identify the individuals and describe the business relationship with each of your officers, directors, or trustees. ☐ Yes ☒ No

- c** Are any of your officers, directors, or trustees related to your highest compensated employees or highest compensated independent contractors listed on lines 1b or 1c through family or business relationships? If "Yes," identify the individuals and explain the relationship. ☐ Yes ☒ No

- 3a** For each of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c, attach a list showing their name, qualifications, average hours worked, and duties.

- b** Do any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c receive compensation from any other organizations, whether tax exempt or taxable, that are related to you through **common control**? If "Yes," identify the individuals, explain the relationship between you and the other organization, and describe the compensation arrangement. ☐ Yes ☒ No

- 4** In establishing the compensation for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, and 1c, the following practices are recommended, although they are not required to obtain exemption. Answer "Yes" to all the practices you use.

- a** Do you or will the individuals that approve compensation arrangements follow a conflict of interest policy? ☒ Yes ☐ No
- b** Do you or will you approve compensation arrangements in advance of paying compensation? ☒ Yes ☐ No
- c** Do you or will you document in writing the date and terms of approved compensation arrangements? ☒ Yes ☐ No

Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)

d	Do you or will you record in writing the decision made by each individual who decided or voted on compensation arrangements?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
e	Do you or will you approve compensation arrangements based on information about compensation paid by similarly situated taxable or tax-exempt organizations for similar services, current compensation surveys compiled by independent firms, or actual written offers from similarly situated organizations? Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
f	Do you or will you record in writing both the information on which you relied to base your decision and its source?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
g	If you answered "No" to any item on lines 4a through 4f, describe how you set compensation that is reasonable for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c.	
5a	Have you adopted a conflict of interest policy consistent with the sample conflict of interest policy in Appendix A to the instructions? If "Yes," provide a copy of the policy and explain how the policy has been adopted, such as by resolution of your governing board. If "No," answer lines 5b and 5c.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
b	What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you for setting their own compensation?	
c	What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you regarding business deals with themselves?	
	Note: A conflict of interest policy is recommended though it is not required to obtain exemption. Hospitals, see Schedule C, Section I, line 14.	
6a	Do you or will you compensate any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, or 1c through non-fixed payments , such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are determined, who is eligible for such arrangements, whether you place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	Do you or will you compensate any of your employees, other than your officers, directors, trustees, or your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year, through non-fixed payments, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are or will be determined, who is or will be eligible for such arrangements, whether you place or will place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
7a	Do you or will you purchase any goods, services, or assets from any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such purchase that you made or intend to make, from whom you make or will make such purchases, how the terms are or will be negotiated at arm's length , and explain how you determine or will determine that you pay no more than fair market value . Attach copies of any written contracts or other agreements relating to such purchases.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	Do you or will you sell any goods, services, or assets to any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such sales that you made or intend to make, to whom you make or will make such sales, how the terms are or will be negotiated at arm's length , and explain how you determine or will determine you are or will be paid at least fair market value. Attach copies of any written contracts or other agreements relating to such sales.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
8a	Do you or will you have any leases, contracts, loans, or other agreements with your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," provide the information requested in lines 8b through 8f.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	Describe any written or oral arrangements that you made or intend to make.	
c	Identify with whom you have or will have such arrangements.	
d	Explain how the terms are or will be negotiated at arm's length .	
e	Explain how you determine you pay no more than fair market value or you are paid at least fair market value.	
f	Attach copies of any signed leases, contracts, loans, or other agreements relating to such arrangements.	
9a	Do you or will you have any leases, contracts, loans, or other agreements with any organization in which any of your officers, directors, or trustees are also officers, directors, or trustees, or in which any individual officer, director, or trustee owns more than a 35% interest? If "Yes," provide the information requested in lines 9b through 9f.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)

- b Describe any written or oral arrangements you made or intend to make.
- c Identify with whom you have or will have such arrangements.
- d Explain how the terms are or will be negotiated at arm's length.
- e Explain how you determine or will determine you pay no more than fair market value or that you are paid at least fair market value.
- f Attach a copy of any signed leases, contracts, loans, or other agreements relating to such arrangements.

Part VI Your Members and Other Individuals and Organizations That Receive Benefits From You

The following "Yes" or "No" questions relate to goods, services, and funds you provide to individuals and organizations as part of your activities. Your answers should pertain to *past, present, and planned* activities. See instructions.

- 1a In carrying out your exempt purposes, do you provide goods, services, or funds to individuals? If "Yes," describe each program that provides goods, services, or funds to individuals. ☒ Yes ☐ No
- b In carrying out your exempt purposes, do you provide goods, services, or funds to organizations? If "Yes," describe each program that provides goods, services, or funds to organizations. ☐ Yes ☒ No
- 2 Do any of your programs limit the provision of goods, services, or funds to a specific individual or group of specific individuals? For example, answer "Yes," if goods, services, or funds are provided only for a particular individual, your members, individuals who work for a particular employer, or graduates of a particular school. If "Yes," explain the limitation and how recipients are selected for each program. ☐ Yes ☒ No
- 3 Do any individuals who receive goods, services, or funds through your programs have a family or business relationship with any officer, director, trustee, or with any of your highest compensated employees or highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c? If "Yes," explain how these related individuals are eligible for goods, services, or funds. ☐ Yes ☒ No

Part VII Your History

The following "Yes" or "No" questions relate to your history. See instructions.

- 1 Are you a **successor** to another organization? Answer "Yes," if you have taken or will take over the activities of another organization; you took over 25% or more of the fair market value of the net assets of another organization; or you were established upon the conversion of an organization from for-profit to nonprofit status. If "Yes," complete Schedule G. ☐ Yes ☒ No
- 2 Are you submitting this application more than 27 months after the end of the month in which you were legally formed? If "Yes," complete Schedule E. ☐ Yes ☒ No

Part VIII Your Specific Activities

The following "Yes" or "No" questions relate to specific activities that you may conduct. Check the appropriate box. Your answers should pertain to *past, present, and planned* activities. See instructions.

- 1 Do you support or oppose candidates in **political campaigns** in any way? If "Yes," explain. ☐ Yes ☒ No
- 2a Do you attempt to **influence legislation**? If "Yes," explain how you attempt to influence legislation and complete line 2b. If "No," go to line 3a. ☐ Yes ☒ No
- b Have you made or are you making an **election** to have your legislative activities measured by expenditures by filing Form 5768? If "Yes," attach a copy of the Form 5768 that was already filed or attach a completed Form 5768 that you are filing with this application. If "No," describe whether your attempts to influence legislation are a substantial part of your activities. Include the time and money spent on your attempts to influence legislation as compared to your total activities. ☐ Yes ☒ No
- 3a Do you or will you operate bingo or **gaming** activities? If "Yes," describe who conducts them, and list all revenue received or expected to be received and expenses paid or expected to be paid in operating these activities. **Revenue and expenses** should be provided for the time periods specified in Part IX, Financial Data. ☐ Yes ☒ No
- b Do you or will you enter into contracts or other agreements with individuals or organizations to conduct bingo or gaming for you? If "Yes," describe any written or oral arrangements that you made or intend to make, identify with whom you have or will have such arrangements, explain how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you pay no more than fair market value or you will be paid at least fair market value. Attach copies of any written contracts or other agreements relating to such arrangements. ☐ Yes ☒ No
- c List the states and local jurisdictions, including Indian Reservations, in which you conduct or will conduct gaming or bingo.

Part VIII Your Specific Activities (Continued)

4a Do you or will you undertake **fundraising**? If "Yes," check all the fundraising programs you do or will conduct. See instructions. ☒ **Yes** ☐ **No**

- | | |
|---|--|
| <input checked="" type="checkbox"/> mail solicitations | <input type="checkbox"/> phone solicitations |
| <input checked="" type="checkbox"/> email solicitations | <input checked="" type="checkbox"/> accept donations on your website |
| <input checked="" type="checkbox"/> personal solicitations | <input type="checkbox"/> receive donations from another organization's website |
| <input type="checkbox"/> vehicle, boat, plane, or similar donations | <input checked="" type="checkbox"/> government grant solicitations |
| <input checked="" type="checkbox"/> foundation grant solicitations | <input type="checkbox"/> Other |

Attach a description of each fundraising program.

b Do you or will you have written or oral contracts with any individuals or organizations to raise funds for you? If "Yes," describe these activities. Include all revenue and expenses from these activities and state who conducts them. Revenue and expenses should be provided for the time periods specified in Part IX, Financial Data. Also, attach a copy of any contracts or agreements. ☐ **Yes** ☒ **No**

c Do you or will you engage in fundraising activities for other organizations? If "Yes," describe these arrangements. Include a description of the organizations for which you raise funds and attach copies of all contracts or agreements. ☐ **Yes** ☒ **No**

d List all states and local jurisdictions in which you conduct fundraising. For each state or local jurisdiction listed, specify whether you fundraise for your own organization, you fundraise for another organization, or another organization fundraises for you.

e Do you or will you maintain separate accounts for any contributor under which the contributor has the right to advise on the use or distribution of funds? Answer "Yes" if the donor may provide advice on the types of investments, distributions from the types of investments, or the distribution from the donor's contribution account. If "Yes," describe this program, including the type of advice that may be provided and submit copies of any written materials provided to donors. ☐ **Yes** ☒ **No**

5 Are you **affiliated** with a governmental unit? If "Yes," explain. ☐ **Yes** ☒ **No**

6a Do you or will you engage in **economic development**? If "Yes," describe your program. ☐ **Yes** ☒ **No**

b Describe in full who benefits from your economic development activities and how the activities promote exempt purposes.

7a Do or will persons other than your employees or volunteers **develop** your facilities? If "Yes," describe each facility, the role of the developer, and any business or family relationship(s) between the developer and your officers, directors, or trustees. ☒ **Yes** ☐ **No**

b Do or will persons other than your employees or volunteers **manage** your activities or facilities? If "Yes," describe each activity and facility, the role of the manager, and any business or family relationship(s) between the manager and your officers, directors, or trustees. ☐ **Yes** ☒ **No**

c If there is a business or family relationship between any manager or developer and your officers, directors, or trustees, identify the individuals, explain the relationship, describe how contracts are negotiated at arm's length so that you pay no more than fair market value, and submit a copy of any contracts or other agreements.

8 Do you or will you enter into **joint ventures**, including partnerships or **limited liability companies** treated as partnerships, in which you share profits and losses with partners other than section 501(c)(3) organizations? If "Yes," describe the activities of these joint ventures in which you participate. ☐ **Yes** ☒ **No**

9a Are you applying for exemption as a childcare organization under section 501(k)? If "Yes," answer lines 9b through 9d. If "No," go to line 10. ☐ **Yes** ☒ **No**

b Do you provide childcare so that parents or caretakers of children you care for can be **gainfully employed** (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k). ☐ **Yes** ☐ **No**

c Of the children for whom you provide childcare, are 85% or more of them cared for by you to enable their parents or caretakers to be gainfully employed (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k). ☐ **Yes** ☐ **No**

d Are your services available to the general public? If "No," describe the specific group of people for whom your activities are available. Also, see the instructions and explain how you qualify as a childcare organization described in section 501(k). ☐ **Yes** ☐ **No**

10 Do you or will you publish, own, or have rights in music, literature, tapes, artworks, choreography, scientific discoveries, or other **intellectual property**? If "Yes," explain. Describe who owns or will own any copyrights, patents, or trademarks, whether fees are or will be charged, how the fees are determined, and how any items are or will be produced, distributed, and marketed. ☐ **Yes** ☒ **No**

Part VIII Your Specific Activities (Continued)

- 11** Do you or will you accept contributions of: real property; conservation easements; closely held securities; intellectual property such as patents, trademarks, and copyrights; works of music or art; licenses; royalties; automobiles, boats, planes, or other vehicles; or collectibles of any type? If "Yes," describe each type of contribution, any conditions imposed by the donor on the contribution, and any agreements with the donor regarding the contribution. ☐ Yes ☒ No
- 12a** Do you or will you operate in a **foreign country** or **countries**? If "Yes," answer lines 12b through 12d. If "No," go to line 13a. ☐ Yes ☒ No
- b** Name the foreign countries and regions within the countries in which you operate.
- c** Describe your operations in each country and region in which you operate.
- d** Describe how your operations in each country and region further your exempt purposes.
- 13a** Do you or will you make grants, loans, or other distributions to organization(s)? If "Yes," answer lines 13b through 13g. If "No," go to line 14a. ☐ Yes ☒ No
- b** Describe how your grants, loans, or other distributions to organizations further your exempt purposes.
- c** Do you have written contracts with each of these organizations? If "Yes," attach a copy of each contract. ☐ Yes ☐ No
- d** Identify each recipient organization and any **relationship** between you and the recipient organization.
- e** Describe the records you keep with respect to the grants, loans, or other distributions you make.
- f** Describe your selection process, including whether you do any of the following.
- (i)** Do you require an application form? If "Yes," attach a copy of the form. ☐ Yes ☐ No
- (ii)** Do you require a grant proposal? If "Yes," describe whether the grant proposal specifies your responsibilities and those of the grantee, obligates the grantee to use the grant funds only for the purposes for which the grant was made, provides for periodic written reports concerning the use of grant funds, requires a final written report and an accounting of how grant funds were used, and acknowledges your authority to withhold and/or recover grant funds in case such funds are, or appear to be, misused. ☐ Yes ☐ No
- g** Describe your procedures for oversight of distributions that assure you the resources are used to further your exempt purposes, including whether you require periodic and final reports on the use of resources.
- 14a** Do you or will you make grants, loans, or other distributions to foreign organizations? If "Yes," answer lines 14b through 14f. If "No," go to line 15. ☐ Yes ☒ No
- b** Provide the name of each foreign organization, the country and regions within a country in which each foreign organization operates, and describe any relationship you have with each foreign organization.
- c** Does any foreign organization listed in line 14b accept contributions earmarked for a specific country or specific organization? If "Yes," list all earmarked organizations or countries. ☐ Yes ☐ No
- d** Do your contributors know that you have ultimate authority to use contributions made to you at your discretion for purposes consistent with your exempt purposes? If "Yes," describe how you relay this information to contributors. ☐ Yes ☐ No
- e** Do you or will you make pre-grant inquiries about the recipient organization? If "Yes," describe these inquiries, including whether you inquire about the recipient's financial status, its tax-exempt status under the Internal Revenue Code, its ability to accomplish the purpose for which the resources are provided, and other relevant information. ☐ Yes ☐ No
- f** Do you or will you use any additional procedures to ensure that your distributions to foreign organizations are used in furtherance of your exempt purposes? If "Yes," describe these procedures, including site visits by your employees or compliance checks by impartial experts, to verify that grant funds are being used appropriately. ☐ Yes ☐ No

Part VIII Your Specific Activities (Continued)

- 15 Do you have a **close connection** with any organizations? If "Yes," explain. ☐ Yes ☒ No
- 16 Are you applying for exemption as a **cooperative hospital service organization** under section 501(e)? If "Yes," explain. ☐ Yes ☒ No
- 17 Are you applying for exemption as a **cooperative service organization of operating educational organizations** under section 501(f)? If "Yes," explain. ☐ Yes ☒ No
- 18 Are you applying for exemption as a **charitable risk pool** under section 501(n)? If "Yes," explain. ☐ Yes ☒ No
- 19 Do you or will you operate a **school**? If "Yes," complete Schedule B. Answer "Yes," whether you operate a school as your main function or as a secondary activity. ☒ Yes ☐ No
- 20 Is your main function to provide **hospital or medical care**? If "Yes," complete Schedule C. ☐ Yes ☒ No
- 21 Do you or will you provide **low-income housing** or housing for the **elderly** or **handicapped**? If "Yes," complete Schedule F. ☐ Yes ☒ No
- 22 Do you or will you provide scholarships, fellowships, educational loans, or other educational grants to individuals, including grants for travel, study, or other similar purposes? If "Yes," complete Schedule H. ☐ Yes ☒ No
- Note:** Private foundations may use Schedule H to request advance approval of individual grant procedures.

Part IX Financial Data

For purposes of this schedule, years in existence refer to completed tax years.

- If in existence less than 5 years, complete the statement for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of:
 - Three years of financial information if you have not completed one tax year, or
 - Four years of financial information if you have completed one tax year. See instructions.
- If in existence 5 or more years, complete the schedule for the most recent 5 tax years. You will need to provide a separate statement that includes information about the most recent 5 tax years because the data table in Part IX has not been updated to provide for a 5th year. See instructions.

A. Statement of Revenues and Expenses

	Type of revenue or expense	Current tax year	3 prior tax years or 2 succeeding tax years			(e) Provide Total for (a) through (d)
		(a) From 07/01/2019 To 6/30/2020	(b) From 07/01/2020 To 6/30/2021	(c) From 07/01/2021 To 6/30/2022	(d) From To	
Revenues	1 Gifts, grants, and contributions received (do not include unusual grants)	1075000	52155	57150		
	2 Membership fees received					
	3 Gross investment income					
	4 Net unrelated business income					
	5 Taxes levied for your benefit					
	6 Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)					
	7 Any revenue not otherwise listed above or in lines 9–12 below (attach an itemized list)		16650000			
	8 Total of lines 1 through 7	1075000	17214797	648742		
	9 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)		6374103	7410144		
	10 Total of lines 8 and 9	1075000	23588900	8058886		
	11 Net gain or loss on sale of capital assets (attach schedule and see instructions)					
	12 Unusual grants					
	13 Total Revenue Add lines 10 through 12	1075000	23588900	8058886		
Expenses	14 Fundraising expenses					
	15 Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)					
	16 Disbursements to or for the benefit of members (attach an itemized list)					
	17 Compensation of officers, directors, and trustees					
	18 Other salaries and wages	206441	3571627	4099661		
	19 Interest expense	48016	121064	1282935		
	20 Occupancy (rent, utilities, etc.)					
	21 Depreciation and depletion					
	22 Professional fees					
	23 Any expense not otherwise classified, such as program services (attach itemized list)	508882	18383787	3521569		
	24 Total Expenses Add lines 14 through 23	763339	22076478	8904165		

Part IX Financial Data (Continued)**B. Balance Sheet (for your most recently completed tax year)**

		Year End:
		(Whole dollars)
Assets		
1	Cash	0
2	Accounts receivable, net	
3	Inventories	
4	Bonds and notes receivable (attach an itemized list)	
5	Corporate stocks (attach an itemized list)	
6	Loans receivable (attach an itemized list)	
7	Other investments (attach an itemized list)	
8	Depreciable and depletable assets (attach an itemized list)	
9	Land	
10	Other assets (attach an itemized list)	
11	Total Assets (add lines 1 through 10)	
Liabilities		
12	Accounts payable	
13	Contributions, gifts, grants, etc. payable	
14	Mortgages and notes payable (attach an itemized list)	
15	Other liabilities (attach an itemized list)	
16	Total Liabilities (add lines 12 through 15)	
Fund Balances or Net Assets		
17	Total fund balances or net assets	
18	Total Liabilities and Fund Balances or Net Assets (add lines 16 and 17)	0
19	Have there been any substantial changes in your assets or liabilities since the end of the period shown above? If "Yes," explain.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Part X Public Charity Status

Part X is designed to classify you as an organization that is either a **private foundation** or a **public charity**. Public charity status is a more favorable tax status than private foundation status. If you are a private foundation, Part X is designed to further determine whether you are a **private operating foundation**. See instructions.

1a	Are you a private foundation? If "Yes," go to line 1b. If "No," go to line 5 and proceed as instructed. If you are unsure, see the instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b	As a private foundation, section 508(e) requires special provisions in your organizing document in addition to those that apply to all organizations described in section 501(c)(3). Check the box to confirm that your organizing document meets this requirement, whether by express provision or by reliance on operation of state law. Attach a statement that describes specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document or by operation of state law. See the instructions, including Appendix B, for information about the special provisions that need to be contained in your organizing document. Go to line 2.	<input type="checkbox"/>
2	Are you a private operating foundation? To be a private operating foundation you must engage directly in the active conduct of charitable, religious, educational, and similar activities, as opposed to indirectly carrying out these activities by providing grants to individuals or other organizations. If "Yes," go to line 3. If "No," go to the signature section of Part XI.	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	Have you existed for one or more years? If "Yes," attach financial information showing that you are a private operating foundation; go to the signature section of Part XI. If "No," continue to line 4.	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	Have you attached either (1) an affidavit or opinion of counsel, (including a written affidavit or opinion from a certified public accountant or accounting firm with expertise regarding this tax law matter), that sets forth facts concerning your operations and support to demonstrate that you are likely to satisfy the requirements to be classified as a private operating foundation; or (2) a statement describing your proposed operations as a private operating foundation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5	If you answered "No" to line 1a, indicate the type of public charity status you are requesting by checking one of the choices below. You may check only one box. The organization is not a private foundation because it is:	
a	509(a)(1) and 170(b)(1)(A)(i)—a church or a convention or association of churches. Complete and attach Schedule A.	<input type="checkbox"/>
b	509(a)(1) and 170(b)(1)(A)(ii)—a school . Complete and attach Schedule B.	<input checked="" type="checkbox"/>
c	509(a)(1) and 170(b)(1)(A)(iii)—a hospital , a cooperative hospital service organization, or a medical research organization operated in conjunction with a hospital. Complete and attach Schedule C.	<input type="checkbox"/>
d	509(a)(3)—an organization supporting either one or more organizations described in line 5a through c, f, h, or i or a publicly supported section 501(c)(4), (5), or (6) organization. Complete and attach Schedule D.	<input type="checkbox"/>

Part X Public Charity Status (Continued)

- e** 509(a)(4) – an organization organized and operated exclusively for testing for public safety. ☐
- f** 509(a)(1) and 170(b)(1)(A)(iv) – an organization operated for the benefit of a college or university that is owned or operated by a governmental unit. ☐
- g** 509(a)(1) and 170(b)(1)(A)(ix) – an agricultural research organization directly engaged in the continuous active conduct of agricultural research in conjunction with a college or university. ☐
- h** 509(a)(1) and 170(b)(1)(A)(vi) – an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public. ☐
- i** 509(a)(2) – an organization that normally receives not more than one-third of its financial support from gross **investment income** and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions). ☐
- j** A publicly supported organization, but unsure if it is described in 5h or 5i. You would like the IRS to decide the correct status. ☐

6 If you checked box h, i, or j in question 5 above, and you have been in existence more than 5 years, you must confirm your public support status. Answer line 6a if you checked box h in line 5 above. Answer line 6b if you checked box i in line 5 above. If you checked box j in line 5 above, answer both lines 6a and 6b.

- a** (i) Enter 2% of line 8, column (e) on Part IX-A Statement of Revenues and Expenses
- (ii) Attach a list showing the name and amount contributed by each person, company, or organization whose gifts totaled more than the 2% amount. If the answer is "None," state this.
- b** (i) For each year amounts are included on lines 1, 2, and 9 of Part IX-A Statement of Revenues and Expenses, attach a list showing the name and amount received from each **disqualified person**. If the answer is "None," state this.
- (ii) For each year amounts were included on line 9 of Part IX-A Statement of Revenues and Expenses, attach a list showing the name of and amount received from each payer, other than a disqualified person, whose payments were more than the larger of (1) 1% of Line 10, Part IX-A Statement of Revenues and Expenses, or (2) \$5,000. If the answer is "None," state this.

7 Did you receive any unusual grants during any of the years shown on Part IX-A Statement of Revenues and Expenses? If "Yes," attach a list including the name of the contributor, the date and amount of the grant, a brief description of the grant, and explain why it is unusual. ☐ Yes ☒ No

Part XI User Fee Information and Signature

You must include the correct user fee payment with this application. If you do not submit the correct user fee, we will not process the application and we will return it to you. Your check or money order must be made payable to the United States Treasury. User fees are subject to change. Check our website at www.irs.gov and type "Exempt Organizations User Fee" in the search box, or call Customer Account Services at 1-877-829-5500 for current information.

Enter the amount of the user fee paid:

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

Please
Sign
Here

(Signature of Officer, Director, Trustee, or other authorized official)

Matt Mathias

(Type or print name of signer)

(Date)

Chairman

(Type or print title or authority of signer)

Schedule B. Schools, Colleges, and Universities

If you operate a school as an activity, complete Schedule B.

Section I Operational Information

- 1a** Do you normally have a regularly scheduled curriculum, a regular faculty of qualified teachers, a regularly enrolled student body, and facilities where your educational activities are regularly carried on? If "No," do not complete the remainder of Schedule B. ☒ **Yes** ☐ **No**
- b** Is the primary function of your school the presentation of formal instruction? If "Yes," describe your school in terms of whether it is an elementary, secondary, college, technical, or other type of school. If "No," do not complete the remainder of Schedule B. ☒ **Yes** ☐ **No**
- 2a** Are you a public school because you are operated by a state or subdivision of a state? If "Yes," explain how you are operated by a state or subdivision of a state. Do not complete the remainder of Schedule B. ☐ **Yes** ☒ **No**
- b** Are you a public school because you are operated wholly or predominantly from government funds or property? If "Yes," explain how you are operated wholly or predominantly from government funds or property. Submit a copy of your funding agreement regarding government funding. Do not complete the remainder of Schedule B. ☐ **Yes** ☒ **No**
- 3** In what public school district, county, and state are you located?
- 4** Were you formed or substantially expanded at the time of public school desegregation in the above school district or county? ☐ **Yes** ☒ **No**
- 5** Has a state or federal administrative agency or judicial body ever determined that you are racially discriminatory? If "Yes," explain. ☐ **Yes** ☒ **No**
- 6** Has your right to receive financial aid or assistance from a governmental agency ever been revoked or suspended? If "Yes," explain. ☐ **Yes** ☒ **No**
- 7** Do you or will you contract with another organization to develop, build, market, or finance your facilities? If "Yes," explain how that entity is selected, explain how the terms of any contracts or other agreements are negotiated at arm's length, and explain how you determine that you will pay no more than fair market value for services. ☒ **Yes** ☐ **No**

Note: Make sure your answer is consistent with the information provided in Part VIII, line 7a.

- 8** Do you or will you manage your activities or facilities through your own employees or volunteers? If "No," attach a statement describing the activities that will be managed by others, the names of the persons or organizations that manage or will manage your activities or facilities, and how these managers were or will be selected. Also, submit copies of any contracts, proposed contracts, or other agreements regarding the provision of management services for your activities or facilities. Explain how the terms of any contracts or other agreements were or will be negotiated, and explain how you determine you will pay no more than fair market value for services. ☒ **Yes** ☐ **No**

Note: Answer "Yes" if you manage or intend to manage your programs through your own employees or by using volunteers. Answer "No" if you engage or intend to engage a separate organization or independent contractor. Make sure your answer is consistent with the information provided in Part VIII, line 7b.**Section II Establishment of Racially Nondiscriminatory Policy**Information required by **Revenue Procedure 75-50.**

- 1** Have you adopted a racially nondiscriminatory policy as to students in your organizing document, bylaws, or by resolution of your governing body? If "Yes," state where the policy can be found or supply a copy of the policy. If "No," you must adopt a nondiscriminatory policy as to students before submitting this application. See Pub. 557. ☒ **Yes** ☐ **No**
- 2** Do your brochures, application forms, advertisements, and catalogues dealing with student admissions, programs, and scholarships contain a statement of your racially nondiscriminatory policy? ☒ **Yes** ☐ **No**
- a** If "Yes," attach a representative sample of each document.
- b** If "No," by checking the box to the right you agree that all future printed materials, including website content, will contain the required nondiscriminatory policy statement. ☐
- 3** Have you published a notice of your nondiscriminatory policy in a newspaper of general circulation that serves all racial segments of the community? See the instructions for specific requirements. If "No," explain. ☒ **Yes** ☐ **No**
- 4** Does or will the organization (or any department or division within it) discriminate in any way on the basis of race with respect to admissions; use of facilities or exercise of student privileges; faculty or administrative staff; or scholarship or loan programs? If "Yes," for any of the above, explain fully. ☐ **Yes** ☒ **No**

Schedule B. Schools, Colleges, and Universities (Continued)

- 5** Complete the table below to show the racial composition for the current academic year and projected for the next academic year, of: (a) the student body, (b) the faculty, and (c) the administrative staff. Provide actual numbers rather than percentages for each racial category.

If you are not operational, submit an estimate based on the best information available (such as the racial composition of the community served).

Racial Category	(a) Student Body		(b) Faculty		(c) Administrative Staff	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
African American	n/a	n/a	n/a	10	n/a	2
	n/a	n/a	n/a	15	n/a	4
	n/a	n/a	n/a	5	n/a	2
	n/a	n/a	n/a	3	n/a	1
	n/a	n/a	n/a	2	n/a	1
Total				35		10

- 6** In the table below, provide the number and amount of loans and scholarships awarded to students enrolled by racial categories.

Racial Category	Number of Loans		Amount of Loans		Number of Scholarships		Amount of Scholarships	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
n/a								
Total								

- 7a** Attach a list of your incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations.

- b** Do any of these individuals or organizations have an objective to maintain segregated public or private school education? If "Yes," explain. ☐ Yes ☒ No

- 8** Will you maintain records according to the nondiscrimination provisions contained in Revenue Procedure 75-50? If "No," explain. See instructions. ☒ Yes ☐ No

J. Governing board by-laws

BYLAWS OF NAPLES CLASSICAL ACADEMY, INC.

ARTICLE I. General

Section 1. Name.

The name of the corporation is NAPLES CLASSICAL ACADEMY, INC. It is hereinafter referred to as “the Corporation” or “School.”

Section 2. Address.

The Corporation’s mailing address and principal place of business shall be as set forth in the Articles of Incorporation or as otherwise established by the Board of Directors from time to time.

Section 3. Purposes.

The general purpose of this Corporation 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 that it is empowered to do under these Articles provided, however, that nothing herein shall be construed as allowing any activities that would jeopardize the Corporation’s tax-exempt status or otherwise be inconsistent with its classification as an organization described in Section 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 Section 170(c)(2) of the Code.

The specific purposes for which the Corporation is formed are to establish, develop, maintain, improve, manage, and otherwise operate one or more public charter schools.

Section 4. Dedication of Assets and Dissolution.

The Corporation’s assets are irrevocably dedicated to its public benefit purposes. Upon dissolution of this Corporation, all properties and assets remaining after payment, or provision for payment, of all debts and liabilities of the Corporation, including disposition of assets pursuant to any applicable charter contract or law applying to charter schools, shall be distributed to one or more nonprofit funds, foundations, or corporations that are organized exclusively for charitable purposes, pursuant to Section 501(c)(3) of the Internal Revenue Code, or the corresponding provision in any future tax code or to a state or local government, for a public purpose, as selected by the Board.

Section 5. Non-discrimination.

The Corporation shall not discriminate on the basis of race, religion, national origin, gender or age in either the hiring or other employment practices of the charter school or in its admission policies for students. The Corporation shall conduct all of its activities in accordance with all applicable local, state, and federal anti-discrimination laws, as well as in accordance with all other laws and so long as the Corporation is in a charter contract, regulations applicable to the operation of public charter schools in the State of Florida.

ARTICLE II. Members

The Corporation does not have any members.

ARTICLE III. Directors

Section 1. Powers and duties.

The Corporation shall be governed by its Directors; as a body the Directors constitute the Board of Directors (hereafter referred to as “Board”). The business, affairs, and property of the Corporation shall be managed by a chief executive officer who shall be employed by the Board at its pleasure and accountable to it as a collective. The Board shall provide oversight of the chief executive officer and may reserve to itself final authority for decisions concerning any of the following:

- a. Perform any and all duties imposed on the Board collectively or individually by law or by these Bylaws;
- b. To make and change policies, rules and regulations not inconsistent with law, or with these Bylaws, for the management and control of the School and its affairs, and of its employees, and agents; to lease, purchase, or otherwise acquire, in any lawful manner, for and in the name of the School, any and all real and personal property, rights, or privileges deemed necessary or convenient for the conduct of the School’s purpose or mission;
- c. To enter into agreements and contracts with individuals, groups of individuals, Corporations or governments for any lawful purpose;
- d. To hire, oversee and direct, as a collective, an individual who will be responsible for the day-to-day operations of the School;
- e. To approve the annual budget and financial plan which shall be monitored and adjusted as necessary throughout the year;
- f. To cause to be kept a complete record of all the minutes, acts and proceedings of the Board;
- g. To cause an annual inspection or audit of the accounts of the School, as well as any other audits required by law, to be made by an accountant to be selected by the Board, showing in reasonable detail all of the assets, liabilities, revenues and expenses of the School and its financial condition;
- h. To ensure that the school’s money and assets are reasonably safeguarded against fraud, waste, and abuse and that school’s financial transactions are managed according to Generally Accepted Accounting Principles and any other applicable standards;
- i. To ensure that the school’s financial position and performance meet all required performance framework metrics;
- j. To set a proper tone at that top regarding ethical conduct in all matters concerning the Corporation;
- k. To ensure ongoing evaluation of the School and provide public accountability;
- l. To uphold and enforce all laws related to charter School operations;
- m. To ensure adequate funding for operation;
- n. To provide appropriate assistance as to the solicitation of funds, receiving of grants, and overall fundraising needs of the School;
- o. To delegate the management of the activities of the School to others, so long as the affairs of the School are managed, and its powers are exercised, under the Board’s ultimate oversight and jurisdiction.

Section 2. Number.

The Board of Directors shall consist of a minimum of five (5) persons and no greater than nine (9) persons unless changed by amendment of these Bylaws.

Section 3. Qualifications.

Each Director must be an individual person who is twenty-five years of age or older. Qualifications for Board Directorship shall include but not be limited to: (a) enthusiasm for the School and conviction in its purpose; (b) support for the principles of the Board Agreement with Hillsdale College and the mission of the Hillsdale College Barney Charter School Initiative; (c) willingness to submit to a extended criminal record background check; (d) agreement to abide by the board's code of conduct; (e) commitment to professional development and the completion of any state requirements for training or development; (f) special skills to address specific management and needs of the School; (g) willingness to accept and support decisions democratically made; and (h) ability to represent the School to the community. Board members do not need to reside in the County in which the Corporation's principal office is located. So long as the Corporation's contract(s) for operation of a public charter school(s) is in effect, all Board members must meet the requirements in said contract, the approved Charter Application(s) and provisions of Florida Statutes and regulations pertaining to governing boards of charter schools ("Charter School Rules"). A Board member who previously qualified to serve under the Charter School Rules but who ceases to be so qualified shall be considered to have resigned effective upon the date of the event or circumstance that causes him/her to lose qualification to serve on the Board.

Section 4. Term.

Board members shall be elected for three-year terms, except as otherwise provided for the initial Board members. Beginning in the first fiscal year the Corporation operates as a charter school, the initial Board members shall establish classes of Board members ("Board Classes") by resolution to provide for Board terms to be staggered so that no more than approximately 1/3 of the Board shall be up for election in any year, unless a vacancy or vacancies need to be filled. The starting date and length of the terms of the initial Board members shall be as set forth in the Board Classes resolution. Newly elected directors shall assume office, and terms of directors that are expiring shall expire, as of the date immediately following the date of the annual meeting of the Board of Directors or at any other time as designated by the Board. Board membership shall be limited to three consecutive three-year terms. Previous Board members shall be re-eligible for membership after a lapse of one year. The three consecutive term limit may be extended by one three-year term by a vote of the Board. An initial appointment as a director to serve the remainder of an unexpired term shall not count toward the three consecutive term limit.

Section 5. Election.

The names of the initial Board members are set forth in the Certificate of Incorporation. All successor Board members shall be elected by the Board of Directors at an election held each year at the annual meeting. The positions of those Board members whose terms will expire shall be voted upon, nominations for such positions shall made by the Board members, and the positions will be filled by vote of those Board members eligible to vote. In the event of a tie vote for a position, a second ballot will be cast for that position only, with only the tied candidates participating on the ballot. Should a second tie vote occur, a result shall be obtained by flipping a coin with the person the first initial of the first name of whom is earliest in the alphabet calling a coin side first. Newly elected Board members shall assume office at the first Board of Directors meeting following their election.

Section 6. Resignation and Removal.

A Board member may resign by submitting his or her resignation in writing to the President of the Corporation. A Board member may be removed with or without cause at a meeting of Board members by an affirmative vote of two-thirds of the full membership of the remaining Board of Directors. Board members being considered for removal shall receive at least two weeks' notice of such proposed action and shall have the opportunity to address the Board regarding such action prior to any vote on such removal.

Section 7. Vacancies.

A vacancy shall be declared in any seat on the Board of Directors upon the death, resignation, or removal of the occupant thereof, or upon the disability of any occupant rendering him or her permanently incapable of participating in the management and affairs of the Corporation. If a vacancy should occur in the Board of Directors, a new member of the Board of Directors shall be elected by a majority of a quorum of the remaining members of the Board of Directors. The new member shall be elected to serve for the remainder of the vacating director's term as set forth in the Board Classes.

Section 8. Compensation.

Board members receive no payment for their services. With Board approval, Board members may be reimbursed for out-of-pocket expenses incurred on approved board business. Board members must present receipts for all such expenses, which shall be for the Board member only, and shall be itemized and documented. Such expenses must be approved by a motion of the Board prior to reimbursement of any such expenditure to the Board meeting. Each year, at the Annual Meeting, the Board of Directors may set a schedule of allowable charges for meals, lodging, and mileage expended on Board business, and in such event, reimbursements shall not exceed these limitations.

Section 9. Parent Representative.

So long as the Corporation's charter contract(s) remains in effect, the Board must appoint a parent representative to facilitate parental involvement and resolve disputes. The parent representative must reside in the county in which the charter school is located and may be a member of the Board, charter school employee or individual contracted to represent the Board. If the Board oversees more than one (1) school in the school district, then a separate parent representative must be appointed for each school. The parent representative must attend meetings of the Corporation in person.

ARTICLE IV. Meetings and Committees

Section 1. Annual Meeting.

An annual meeting of the Board of Directors for the election of Board members and such other business as may come before the meeting shall be held in May of each year or such other month in the year as designated by the Board. Prior written notice shall be given not less than 10 days of the time, place, and purposes of the meeting. The meeting shall be held at the principal location of the Corporation or such other place as shall be specified in the meeting notice.

Section 2. Regular Meetings.

Regular meetings of the Board of Directors shall be held at least once a quarter. For purposes of this Section, the Annual Meeting shall be considered a Regular Meeting. Timely notice of all such regular meetings shall be provided. So long as the Corporation is in a charter contract, at least two meetings of the Corporation shall be held each year in the school district in which the charter school is located, and notices will be posted and provided as set forth in said charter contract and Florida law.

Section 3. Special Meetings.

Special meetings of the Board of Directors for any purpose or purposes may be called at any time by any member of the Board of Directors. Such meetings shall be held upon not less than two business days' notice given personally or by telephone, facsimile, or electronic communication media technology. Such notice shall specify the time and place of the meeting. So long as the Corporation is in a charter contract, such notice will also be posted and provided as set forth in said charter contract and Florida law. Emergency meetings may be called by the Board Chair and held upon notice as required by law.

Section 4. Quorum.

A majority of the full number of Board members shall constitute a quorum of the Board for the transaction of business. Quorum may be established by in-person attendance or by attendance through communications media technology in accordance with the requirements of Section 1002.33(9), Florida Statutes. When a quorum is present, a majority of the Board members present may take any action on behalf of the Board, except to the extent that a larger number is required by law, by a charter contract, or by these Bylaws. Every act of a majority of the Board members present at a meeting duly held at which a quorum is present shall be regarded as the act of the Board of Directors.

Section 5. Meeting Attendance.

Board members are expected to attend all Board meetings. It shall be the duty of the Secretary of the Board to communicate with any Board member after such Board member's three unexcused, consecutive absences or four unexcused absences within twelve months to ascertain the Board member's interest in retaining Board membership. Failure to provide an adequate response may qualify as sufficient cause for removal from the Board of Directors.

Section 6. Open Meetings.

So long as the Corporation's charter contract(s) remains in effect, 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 Directors will be open and accessible to the public, noticed and conducted in accordance with the Florida Sunshine Act (Section 286.011, Florida Statutes). Meetings of the Board shall not be closed to the public except as specifically permitted by the Florida Sunshine Act and with prior consultation with legal counsel. The Corporation will establish a policy governing public comment and input in accordance with Florida law.

Section 7. Voting by Unanimous Written Consent and by Proxy.

Voting by any written consent or proxy is prohibited so long as the Corporation is in a charter contract.

Section 8. Committee Establishment; Membership; Terms.

The Board of Directors may establish and appoint members to such standing committees and/or ad hoc committees as it thinks necessary for the effective governing of the Corporation. The permitted activities and scope of each such committee shall be established by the Board at the inception of each such committee and may be amended by the Board from time to time. However, no such committee shall have the authority of the Board of Directors in reference to amending, altering, or repealing the Bylaws or Articles of Incorporation; electing, appointing, or removing any member of any committee or subcommittee or any Director or Officer of the Corporation; amending the Articles of Incorporation; adopting a plan of merger or consolidation with another corporation; authorizing the sale, lease, exchange, or mortgage of all or substantially all of the property and assets of the Corporation;

authorizing the voluntary dissolution of the Corporation or revoking proceedings thereof; adopting a plan for the distribution of the assets of the Corporation; or amending, altering, or repealing any resolution of the Board of Directors which by its terms provides that it shall not be amended, altered, or repealed by such committee. Committees may be made up of Board members and non-Board members. The Board shall appoint a chair for each committee unless otherwise provided in these Bylaws. The Board of Directors shall have the power at any time to change the number and members of any such committee, to fill vacancies, to remove a committee member and to discharge any such committee. So long as the Corporation's contract for operation of a public charter school remains in effect, any Standing or Ad Hoc Committees subject to the Florida Sunshine Act (Section 286.011, Florida Statutes) will be noticed and conducted in accordance with such Act.

Section 9. Audit Committee.

The Board of Directors shall appoint an Audit Committee that will be chaired by the Treasurer. The Audit Committee will be considered a standing committee. It will assist the whole Board with financial management oversight but will not participate in the financial management of the Corporation. The Audit Committee shall recommend to the Board the selection of the independent auditing firm and will perform such other duties as identified by the Board.

ARTICLE V. Officers

Section 1. Titles.

The Officers of the Corporation shall be Board Chair, Vice Chair, Secretary, and Treasurer. The Board of Directors may create such other officer positions as it thinks necessary. Each officer position shall have its duties and responsibilities specified and included in these Bylaws. Officers may hold more than one position at the same time, except that the Secretary and the Treasurer may not serve concurrently as the President.

Section 2. Election.

The Officers shall be elected from among the Board of Directors at each annual meeting of the Board members and shall serve for one year and until their successors are elected and qualified. New offices may be created and filled at any meeting of the full Board.

Section 3. Duties.

Officers shall have the duties and responsibilities belonging to their office, including those that follow.

(a) The Board Chair shall be responsible, along with his/her fellow Board members, for the oversight of the Corporation's business and affairs. He/she shall preside at all meetings of the Board. The Board Chair shall have full and equal vote as accorded to all Board members. The Board Chair may enter into and execute in the name of the Corporation contracts or other instruments that are authorized by the Board of Directors. The Board Chair may delegate, as needed, to any other officer any or all of the duties of the office of Board Chair. He/she shall have such other powers and duties as may be prescribed by the Board of Directors or by these Bylaws.

(b) The Vice Chair shall have such duties and responsibilities as may be delegated to him/her by the Board Chair. The Vice Chair shall have full and equal vote as accorded to all Board members. In the absence of the Board Chair, the Vice Chair shall perform all the duties of the Board Chair and,

when so acting, shall have all the responsibilities of and be subject to all the restrictions as fall upon the Board Chair, including presiding at meetings of the Board of Directors. He/she shall have such other powers and duties as may be prescribed by the Board of Directors or by these Bylaws.

(c) The Secretary shall cause notices of all meetings to be served to all members of the Board of Directors and shall keep or cause to be kept the minutes of all meetings of the Board, including the time and place, the names of those present, the actions taken, and the votes on such actions. The Secretary shall present the minutes of the previous meeting at the subsequent meeting to be voted on by the Board and duly noted in the minutes of the current meeting. The Secretary shall ensure the integrity of the Board's documents. He/she shall have such other powers and duties as may be prescribed by the Board or by these Bylaws.

(d) The Treasurer shall assist the whole board with oversight of the Corporation's financial management. The Treasurer assists the Board in the development of financial policies and helps ensure that performance aligns favorably with policy. The Treasurer shall chair the Board's Audit Committee. As such, the Treasurer shall not be a signer on any account nor shall have any authority to approve or authorize transactions. The Treasurer has no disproportionate responsibility for the financial performance of the school. The Treasurer shall ensure that regular books of account are kept for the Corporation that set out business transactions of the Corporation and reports and filing made, all in compliance with applicable Florida law, and that such books are at all times open to inspection at the Corporation's place of keeping to any Board member or as otherwise required by law or charter contract.

Section 4. Resignation and Removal; Vacancy.

A Board member may resign by submitting his or her resignation in writing to the Board Chair. Any officer may be removed from office, with or without cause, by the affirmative vote of two-thirds of the full membership of the Board of Directors at any regular meeting or special meeting called for that purpose. Any officer proposed to be removed for cause shall be entitled to at least five business days' notice in writing by mail of the meeting of the Board of Directors at which such removal is to be voted upon and shall be entitled to appear before and be heard by the Board of Directors at such meeting. A vacancy occurring in any office of the Corporation by death, resignation, removal or otherwise shall be filled by the Board of Directors.

Section 5. Compensation.

Directors who serve as officers shall not receive any compensation for their services.

ARTICLE VI. Fiscal Year and Check Signing

Section 1. Fiscal Year.

The fiscal year of the Corporation shall be July 1st to June 30th.

Section 2. Check Signing; Deposits.

The Board Chair is authorized to sign checks for the Corporation. The Corporation may authorize other persons to sign checks by written resolution adopted by a majority of a quorum of the Board. The Board of Directors shall establish a policy setting the amount above which checks must have two signatures. All funds of the Corporation shall be deposited from time to time to the credit of the Corporation in such banks, trust companies, or other depositories as the Board of Directors may select.

ARTICLE VII. Amendments to Bylaws

The Board of Directors shall have the power to make, amend, or repeal the Bylaws of the Corporation, either in whole or in part. The Bylaws may be amended at any regular meeting of the Board of Directors or any special meeting called for that purpose. Written notice stating the time and location of the regular meeting or special meeting must be given to all Board members not less than ten (10) days prior to the meeting at which such change(s) shall be proposed and voted upon. Any change shall require the approval by a two-thirds (2/3rds) vote of the full membership of the Board assuming no vacancies.

ARTICLE VIII. Additional Provisions

Section 1. Indemnification of Officers and Board Members.

The Corporation shall indemnify and advance expenses on behalf of its Directors and Officers to the fullest extent permitted under Section 617.0831, Florida Statutes, as amended, or any successor thereto. Said indemnification shall extend to any and all liabilities of the Directors and Officers arising from their relationships with the Corporation in any and all capabilities. By resolution duly adopted, the Board of Directors may authorize the Corporation to (i) indemnify any or all of its employees and agents who are not Directors to any extent that the Board of Directors may determine, up to and including the fullest extent permitted under Section 617.0831, Florida Statutes, as amended, or any successor thereto, and/or (ii) provide insurance coverage to any or all of its directors, officers, employees and agents against any or all risks or liabilities that such persons may incur by virtue of their relationship with the Corporation. A Board member or officer shall not be personally liable to the Corporation for damages for breach of any duty owed to the Corporation, its beneficiaries, or its Board of Directors, except that nothing contained herein shall relieve a Board member or officer from liability for breach of a duty based on an act of omission: (a) in breach of such person's duty of loyalty to the Corporation; (b) not in good faith or involving a knowing violation of law; or (c) resulting in receipt of an improper personal benefit.

Section 2. Insurance.

The Board of Directors shall provide for the liability and other forms of insurance considered to be necessary and prudent as protection against possible claims.

Section 3. Audit.

At the close of the first fiscal year of charter school operation, the accounts of the Corporation shall be audited by an independent auditor, who meets the requirements set forth in Florida law for auditors of charter schools and who has expertise in accounting of tax-exempt organizations generally. The auditor shall be selected in accordance with the procedures required by law. The audit shall be done in compliance with Florida Statutes governing charter schools and with all applicable state and federal laws controlling non-profit tax-exempt corporations. Copies of the audit shall be provided to agencies in accordance with legal requirements.

Section 4. Private Foundations and Other Limitations.

In no case shall the Corporation indemnify, reimburse, or insure any person for any taxes imposed on such person under chapter 42 of the Code. Furthermore, (a) if at any time the Corporation is a private foundation within the meaning of Section 509(a) of the Code, then during such time no payment shall be made under this Article if such payment would constitute an act of self-dealing or

taxable expenditure as defined in Section 4941(d) or Section 4945(d), respectively, of the Code and (b) if at any time the Corporation is not a private foundation within the meaning of Section 509 of the Code, then during such time no payment shall be made under this Article if such payment would constitute an excess benefit transaction as defined in Section 4958 of the Code.

Section 5. Contracts.

The Board of Directors may authorize any Officer or Officers, agent or agents of the Corporation, in addition to the Officers so authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation, provided that such contract or instrument is not in violation of the Articles of Incorporation, these Bylaws or applicable law. Such authority may be general or confined to specific instances.

Section 6. Books and Records.

The Corporation shall keep correct and complete books and records of account, shall keep minutes of the proceedings of its Board of Directors and committees having any authority of the Board of Directors.

K. Governing board code of ethics and conflict of interest policy

Code of Ethics

NCA adopts the FLDOE Rule 6A-10.081 Principles of Professional Conduct for the Education Profession in Florida for our Code of Ethics, applicable to both employees and the governing board.

1. NCA educators shall be guided by the following ethical principles:
 - a. The educator values the worth and dignity of every person, the pursuit of truth, devotion to excellence, acquisition of knowledge, and the nurture of democratic citizenship. Essential to the achievement of these standards are the freedom to learn and to teach and the guarantee of equal opportunity for all.
 - b. The educator's primary professional concern will always be for the student and for the development of the student's potential. The educator will therefore strive for professional growth and will seek to exercise the best professional judgment and integrity.
 - c. The educator is aware of the importance of maintaining the respect and confidence of one's colleagues, of students, of parents, and of other members of the community, the educator strives to achieve and sustain the highest degree of ethical conduct.
2. NCA educators shall comply with the following disciplinary principles. Violation of any of these principles shall subject the individual to revocation or suspension of the individual educator's certificate, or the other penalties as provided by law.
 - a. Obligation to the student requires that the individual:
 1. Shall make reasonable effort to protect the student from conditions harmful to learning and/or to the student's mental and/or physical health and/or safety.
 2. Shall not unreasonably restrain a student from independent action in pursuit of learning.
 3. Shall not unreasonably deny a student access to diverse points of view.
 4. Shall not intentionally suppress or distort subject matter relevant to a student's academic program.
 5. Shall not intentionally expose a student to unnecessary embarrassment or disparagement.
 6. Shall not intentionally violate or deny a student's legal rights.
 7. Shall not harass or discriminate against any student on the basis of race, color, religion, sex, age, national or ethnic origin, political beliefs, marital status, handicapping condition, sexual orientation, or social and family background and shall make reasonable effort to assure that each student is protected from harassment or discrimination.
 8. Shall not exploit a relationship with a student for personal gain or advantage.
 9. Shall keep in confidence personally identifiable information obtained in the course of professional service, unless disclosure serves professional purposes or is required by law.
 - b. Obligation to the public requires that the individual:
 1. Shall take reasonable precautions to distinguish between personal views and those of any educational institution or organization with which the individual

is affiliated.

2. Shall not intentionally distort or misrepresent facts concerning an educational matter in direct or indirect public expression.
3. Shall not use institutional privileges for personal gain or advantage.
4. Shall accept no gratuity, gift, or favor that might influence professional judgment.
5. Shall offer no gratuity, gift, or favor to obtain special advantages.

c. Obligation to the profession of education requires that the individual:

1. Shall maintain honesty in all professional dealings.
2. Shall not on the basis of race, color, religion, sex, age, national or ethnic origin, political beliefs, marital status, handicapping condition if otherwise qualified, or social and family background deny to a colleague professional benefits or advantages or participation in any professional organization.
3. Shall not interfere with a colleague's exercise of political or civil rights and responsibilities.
4. Shall not engage in harassment or discriminatory conduct which unreasonably interferes with an individual's performance of professional or work responsibilities or with the orderly processes of education or which creates a hostile, intimidating, abusive, offensive, or oppressive environment; and, further, shall make reasonable effort to assure that each individual is protected from such harassment or discrimination.
5. Shall not make malicious or intentionally false statements about a colleague.
6. Shall not use coercive means or promise special treatment to influence professional judgments of colleagues.
7. Shall not misrepresent one's own professional qualifications.
8. Shall not submit fraudulent information on any document in connection with professional activities.
9. Shall not make any fraudulent statement or fail to disclose a material fact in one's own or another's application for a professional position.
10. Shall not withhold information regarding a position from an applicant or misrepresent an assignment or conditions of employment.
11. Shall provide upon the request of the certified individual a written statement of specific reason for recommendations that lead to the denial of increments, significant changes in employment, or termination of employment.
12. Shall not assist entry into or continuance in the profession of any person known to be unqualified in accordance with these Principles of Professional Conduct for the Education Profession in Florida and other applicable Florida Statutes and State Board of Education Rules.
13. Shall self-report within forty-eight (48) hours to appropriate authorities (as determined by district) any arrests/charges involving the abuse of a child or the sale and/or possession of a controlled substance. Such notice shall not be considered an admission of guilt nor shall such notice be admissible for any purpose in any proceeding, civil or criminal, administrative or judicial, investigatory or adjudicatory. In addition, shall self-report any conviction, finding of guilt, withholding of adjudication, commitment to a pretrial diversion program, or entering of a plea of guilty or Nolo Contendere for any criminal offense other than a minor traffic violation within forty-eight (48)

hours after the final judgment. When handling sealed and expunged records disclosed under this rule, school districts shall comply with the confidentiality provisions of Sections 943.0585(4)(c) and 943.059(4)(c), F.S.

14. Shall report to appropriate authorities any known allegation of a violation of the Florida School Code or State Board of Education Rules as defined in Section 1012.795(1), F.S.
15. Shall seek no reprisal against any individual who has reported any allegation of a violation of the Florida School Code or State Board of Education Rules as defined in Section 1012.795(1), F.S.
16. Shall comply with the conditions of an order of the Education Practices Commission imposing probation, imposing a fine, or restricting the authorized scope of practice.
17. Shall, as the supervising administrator, cooperate with the Education Practices Commission in monitoring the probation of a subordinate.

Conflict of Interest Policy

Policy 2.7 Conflict of Interest Policy

The following Conflict of Interest and Anti-Nepotism Policy of Naples Classical Academy, Inc. (the “Organization” or “Charter School”) is intended to supersede and replace all prior conflict of interest policies of the Organization. The purpose of this Conflict of Interest Policy 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.

Adopted: TBD

2.7.2 Definitions

2.7.2.1 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 2.7.2.2 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 2.7.2.6 or 2.7.6 below.

2.7.2.2 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:

2.7.2.2.1 An ownership or investment interest in any entity with which the Organization has a transaction or arrangement; or

2.7.2.2.2 A Compensation Arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement; or

2.7.2.2.3 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.

2.7.2.3 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 Section 2.7.6, below, that does not otherwise constitute a Financial Interest.

2.7.2.4 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.

2.7.2.5 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.

2.7.2.6 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.

Adopted: TBD

2.7.3 Disclosure of Financial or Other Interest and Determination of Conflict

2.7.3.1 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:

2.7.3.1.1 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

2.7.3.1.2 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.

2.7.3.2 Recusal by Interested Person, if Legally Permissible.

In connection with an Interested Person's disclosure of a Financial or Other Interest pursuant to Section 2.7.3.1, 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 2.7.3.1, 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.

2.7.3.3 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.

2.7.3.4 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:

2.7.3.4.1 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.

2.7.3.4.2 The purchase or sale is for legal advertising in a newspaper, for any utilities service, or for passage on a common carrier.

2.7.3.4.3 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.

2.7.3.4.4 The total amount of the transactions in the aggregate between the business entity and the Organization does not exceed \$500 per calendar year.

2.7.3.4.5 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.

2.7.3.4.6 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.

Adopted: TBD

2.7.4 Procedures Upon Determination of Conflict of Interest

2.7.4.1 Exclusion from Discussion and Vote.

In circumstances where the Board has determined that a Conflict of Interest exists, 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 be present in the meeting room for the discussion or vote relating to the transaction or arrangement.

2.7.4.2 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. If such a Conflict of Interest exists, the Interested Person will be required to resign or will be removed from the Board.

2.7.4.3 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 2.7.4.2, 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.

Adopted: TBD

2.7.5 Documentation of Disclosure and Procedures

2.7.5.1 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 2.7.4.1 and 2.7.4.2, 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.

Adopted: TBD

2.7.6 Other Prohibited Conflicts of Interest

2.7.6.1 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.

2.7.6.2 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 from 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.

2.7.6.3 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 that 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.

2.7.6.4 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.

2.7.6.5 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.

Adopted: TBD

2.7.7 Restriction on Employment of Relatives, Pursuant to Section 1002.33(24), Florida Statutes

2.7.7.1 For purposes of this section 2.7.7, "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.

2.7.7.2 For purposes of this section 2.7.7 “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.

2.7.7.3 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.

2.7.7.4 The approval of budgets does not constitute “jurisdiction or control” for the purposes of this subsection.

Adopted: TBD

2.7.8 Disclosure of Identity of Relatives Employed by, or Assigned to Work at, Charter School

2.7.8.1 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 section 2.7.8, the term “relative” has the same meaning as set forth in section 2.7.7, above.

Adopted: TBD

2.7.9 Employment of Relatives

2.7.9.1 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.

2.7.9.2 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.

Adopted: TBD

2.7.10 Training and Background Screening Requirements

2.7.10.1 Governance Training

2.7.10.1.1 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 after final appointment to the governing board.

2.7.10.1.2 Required governance training consists of a minimum of four (4) hours of instruction focusing on government in the areas of sunshine, conflicts of interest, ethics, and financial responsibility.

2.7.10.1.3 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.

2.7.10.2 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.

Adopted: TBD

2.7.11 Initial and Annual Written Assent

2.7.11.1 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:

2.7.11.1.1 Has received a copy of the conflicts of interest policy;

2.7.11.1.2 Has read and understands the policy;

2.7.11.1.3 Has agreed to comply with the policy;

2.7.11.1.4 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

2.7.11.1.5 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.

2.7.11.1.6. Said form shall be updated from time to time to reflect changes in law and best practices for charter school governing boards.

Adopted: TBD

2.7.12 Periodic Reviews

2.7.12.1 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:

2.7.12.1.1. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and are the result of arm's length bargaining.

2.7.12.1.2 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.

Adopted: TBD

2.7.13 Use of Outside Experts

When conducting the periodic reviews as provided for in section 2.7.12, 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.

Adopted: TBD

2.7.14 Board Secretary Certificate

I hereby certify that the foregoing Conflict of Interest and Anti-Nepotism Policy for Naples Classical Academy, Inc., was adopted by a majority vote of a quorum of the Governing Board of Directors at a duly noticed meeting held on _____.

Board Secretary

Adopted: TBD

2.7.15 EXHIBIT A

WRITTEN AFFIRMATION BY GOVERNING BOARD OR COMMITTEE MEMBER NAPLES CLASSICAL ACADEMY, INC.

This written affirmation is provided in accordance with the Conflict of Interest Policy of Naples Classical Academy, Inc., (“Organization”) adopted and effective as of _____ (“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.

Signed _____

Printed Name: _____

Title and Office: _____

Date: _____

Adopted: TBD

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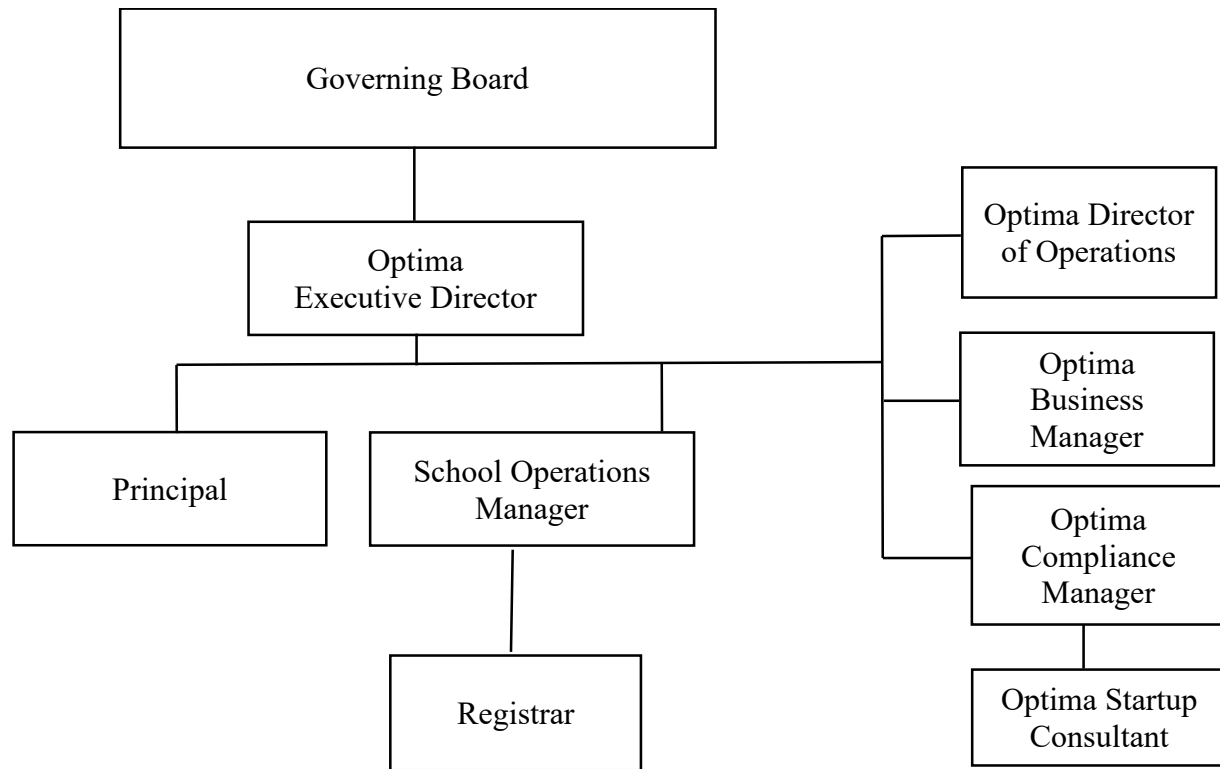
L. For each board member, a Board Member Information Sheet, Resume, and Statement of Assurances (Attestation)

Board member information sheets, resumes, and statements of assurances are included for each founding board member, along with the statement of assurances signed by a representative of the board.

M. Organization charts

Attachment M1

Pre-Operational Year ORGANIZATIONAL CHART



Pre-Operational Year Roles and Responsibilities

1. Governing Board

- a. Establish school mission and philosophy
- b. Manage grievance process
- c. Manage executive director
- d. Manage school progress toward meeting SIP goals
- e. Approve board policies
- f. Approve annual budget
- g. Approve financial reports for submittal to district
- h. Approve contracts
- i. Approve salary schedule
- j. Approve Mental Health Assistance Allocation Plan

2. Executive Director

- a. Manages principal
- b. Manages school operations manager
- c. Oversees business, financial, compliance, and operations functions

3. School Operations Manager

- a. Implements school policies
- b. Manages business manager, who:
 - i. Develops budget for board approval
 - ii. Manages purchases
 - iii. Manages vendor relations
 - iv. Manages human resources provider (ESI)
 - 1. Payroll
 - 2. Hiring
 - 3. Terminations
 - v. Manages financial services provider
 - 1. Purchases within budget
 - 2. Financial Reports
 - 3. Budget updates as required
- c. Manages registrar, who:
 - i. Manages registration
 - ii. Manages lottery
 - iii. Manages school student information system
 - iv. Performs data entry into district system

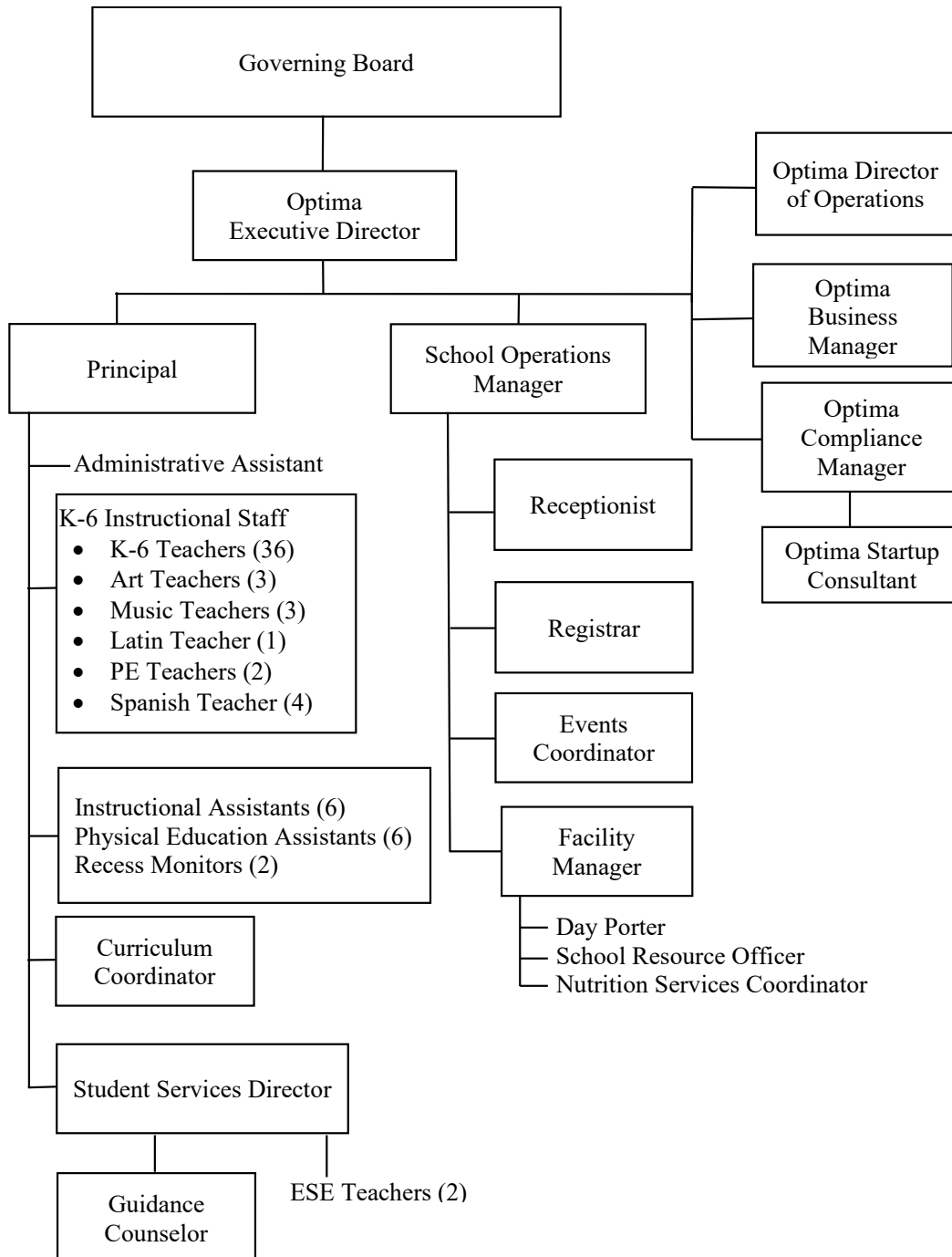
4. Principal

- a. Implements school policies
- b. Performs as academic leader of school
- c. Mentors and trains faculty
- d. Manages administrative assistant
- e. Manages curriculum coordinator, who:
 - i. Manages curriculum selection and procurement planning
 - ii. Manages curriculum alignment to Florida Standards
 - iii. Manages benchmark and diagnostic academic testing

Attachment M2

First Year of School Operations ORGANIZATIONAL CHART

First Year of Operation Roles and Responsibilities



1. Governing Board

- Establish school mission and philosophy
- Manage grievance process
- Manage executive director

- d. Manage school progress toward meeting SIP goals
- e. Approve board policies
- f. Approve annual budget
- g. Approve financial reports for submittal to district
- h. Approve contracts
- i. Approve salary schedule
- j. Approve Mental Health Assistance Allocation Plan

2. Executive Director

- a. Manages principal
- b. Manages school operations manager
- c. Oversees business, financial, compliance, and operations functions

3. School Operations Manager

- a. Implements school policies
- b. Manages business manager, who:
 - i. Develops budget for board approval
 - ii. Manages purchases
 - iii. Manages vendor relations
 - iv. Manages human resources provider (ESI)
 - 1. Payroll
 - 2. Hiring
 - 3. Terminations
 - v. Manages financial services provider
 - 1. Purchases within budget
 - 2. Financial reports
 - 3. Budget updates as required
- c. Manages receptionist
- d. Manages registrar, who:
 - i. Manages registration
 - ii. Manages lottery
 - iii. Manages school student information system
 - iv. Performs data entry into district system
- e. Manages facility manager, who:
 - i. Manages facility maintenance program
 - ii. Manages facility custodial program
 - iii. Manages facility vendors
 - iv. Manages lunch program
 - v. Manages transportation program
 - vi. Manages school security and safety program
 - vii. Manages clinic

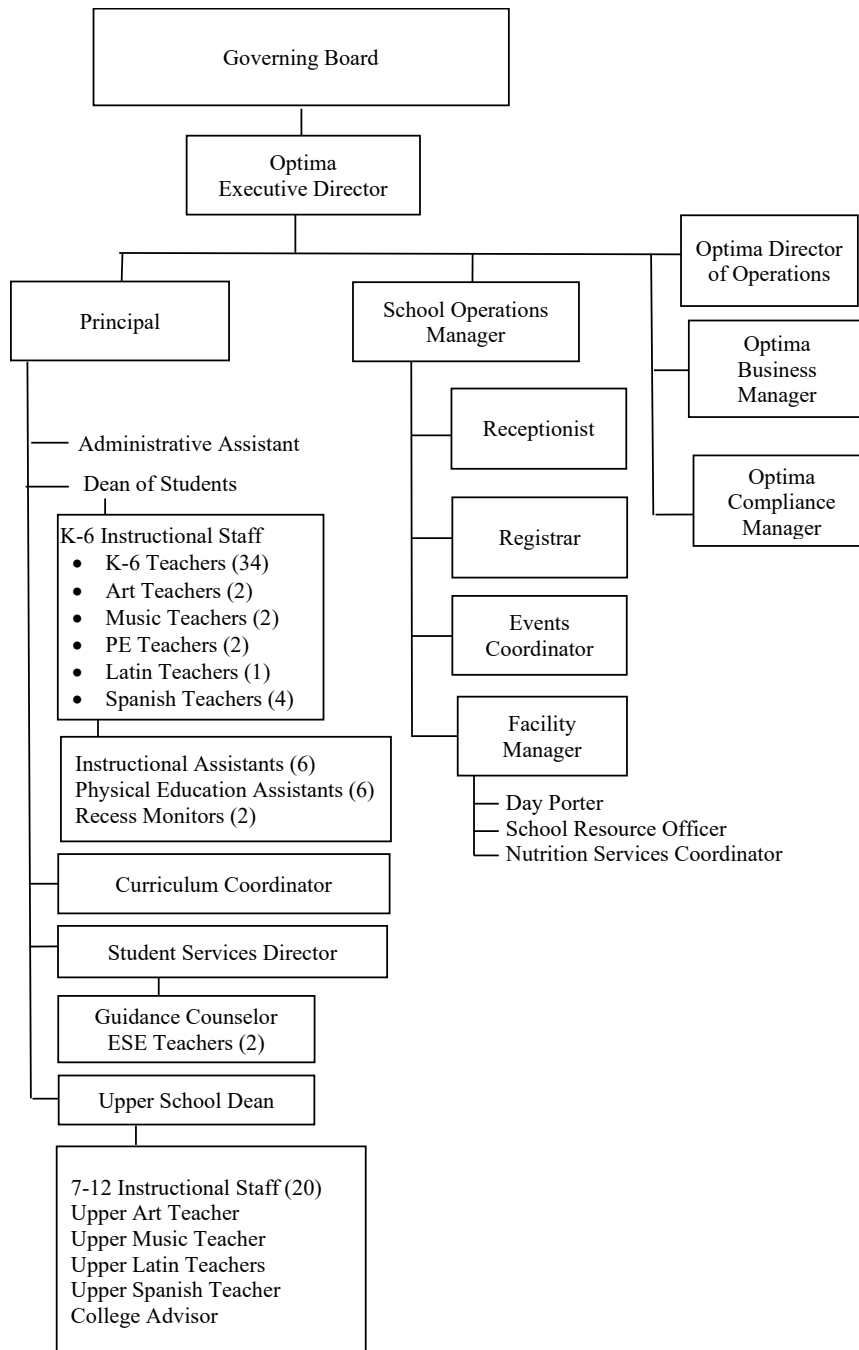
4. Principal

- a. Implements school policies
- b. Performs as academic leader of school
- c. Mentors and trains faculty

- d. Manages administrative assistant
- e. Manages:
 - i. Manages K-6 instructional staff
 - a. Teachers
 - b. Instructional assistants
 - ii. Manages discipline program
 - iii. Manages achievement of grades K-6 SIP goals
- f. Manages Student Services Director
- g. Manages curriculum coordinator, who:
 - i. Manages curriculum selection and procurement planning
 - ii. Manages curriculum alignment to Florida Standards
 - iii. Manages benchmark and diagnostic academic testing
- h. Manages guidance counselor, who:
 - i. Provides mental health assistance

End of Charter Term ORGANIZATIONAL CHART

End of Charter Term Roles and Responsibilities



1. Governing Board

- a. Establish school mission and philosophy
- b. Manage grievance process

- c. Manage executive director
- d. Manage school progress toward meeting SIP goals
- e. Approve board policies
- f. Approve annual budget
- g. Approve financial reports for submittal to district
- h. Approve contracts
- i. Approve salary schedule
- j. Approve Mental Health Assistance Allocation Plan

2. Executive Director

- a. Manages principal
- b. Manages school operations manager
- c. Oversees business, financial, compliance, and operations functions

3. School Operations Manager

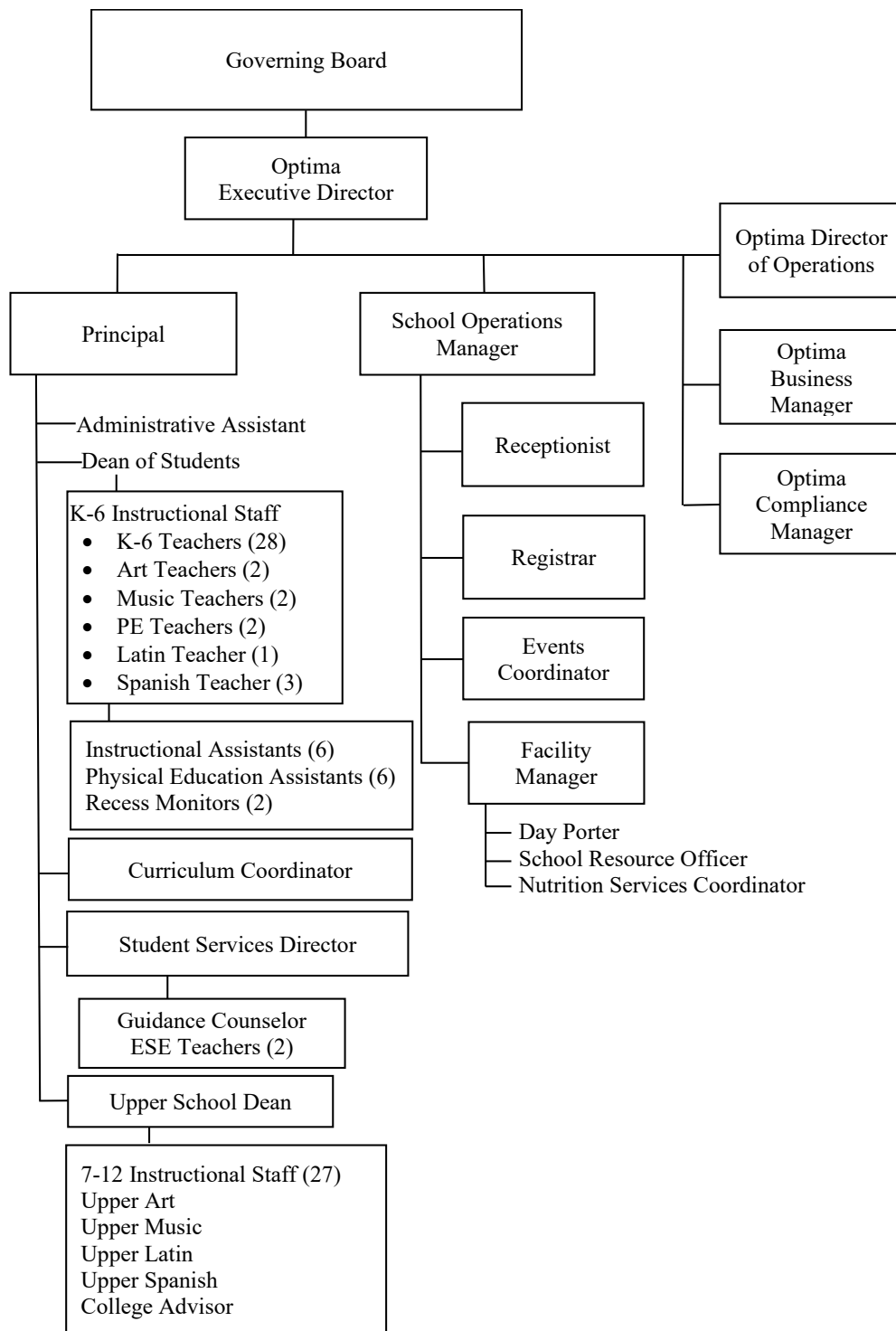
- a. Implements school policies
- b. Manages business manager, who:
 - i. Develops budget for board approval
 - ii. Manages purchases
 - iii. Manages vendor relations
 - iv. Manages human resources provider (ESI)
 - 1. Payroll
 - 2. Hiring
 - 3. Terminations
 - v. Manages financial services provider
 - 1. Purchases within budget
 - 2. Financial reports
 - 3. Budget updates as required
- c. Manages receptionist
- d. Manages registrar, who:
 - i. Manages registration
 - ii. Manages lottery
 - iii. Manages school student information system
 - iv. Performs data entry into district system
- e. Manages facility manager, who:
 - i. Manages facility maintenance program
 - ii. Manages facility custodial program
 - iii. Manages facility vendors
 - iv. Manages lunch program
 - v. Manages transportation program
 - vi. Manages school security and safety program
 - vii. Manages Clinic
- f. Manages compliance manager, who:
 - i. Manages compliance with federal, state and charter requirements
- g. Manages project coordinator, who:
 - i. Coordinates all special events

- ii. Coordinates all projects
- iii. Coordinates FLKRS and FSA testing
- iv. Coordinates substitute program

4. Principal

- a. Implements School Policies
- b. Performs as Academic Leader of school
- c. Mentors and trains faculty
- d. Manages administrative assistant
- e. Manages dean of students, who:
 - i. Manages K-6 Instructional Staff
 - 1. Teachers
 - 2. Instructional Assistants
 - ii. Manages Discipline Program
 - iii. Manages achievement of grades K-6 SIP goals
- f. Manages Student Services Director
- g. Manages curriculum coordinator, who:
 - i. Manages Curriculum selection and procurement planning
 - ii. Manages Curriculum alignment to Florida Standards
 - iii. Manages benchmark and diagnostic academic testing
- h. Manages guidance counselor, who:
 - i. Provides mental health assistance
- i. Manages upper school dean who:
 - i. Manages Grades 7-12 Instructional Staff
 - ii. Manages college advisor (upper school course scheduling)
 - iii. Manages achievement of 7-12 SIP goals

Full Capacity ORGANIZATIONAL CHART



Full Capacity Roles and Responsibilities

1. Governing Board

- a. Establish school mission and philosophy
- b. Manage grievance process
- c. Manage executive director
- d. Manage school progress toward meeting SIP goals
- e. Approve board policies
- f. Approve annual budget
- g. Approve financial reports for submittal to district
- h. Approve contracts
- i. Approve salary schedule
- j. Approve Mental Health Assistance Allocation Plan

2. Executive Director

- a. Manages principal
- b. Manages school operations manager
- c. Oversees business, financial, compliance, and operations functions

3. School Operations Manager

- a. Implements school policies
- b. Manages business manager, who:
 - i. Develops budget for board approval
 - ii. Manages purchases
 - iii. Manages vendor relations
 - iv. Manages human resources provider (ESI)
 - 1. Payroll
 - 2. Hiring
 - 3. Terminations
 - vi. Manages financial services provider
 - 1. Purchases within budget
 - 2. Financial Reports
 - 3. Budget updates as required
- c. Manages receptionist
- d. Manages registrar, who:
 - i. Manages registration
 - ii. Manages lottery
 - iii. Manages school student information system
 - iv. Performs data entry into district system
- e. Manages facility manager, who:
 - i. Manages Facility Maintenance program
 - ii. Manages Facility Custodial program
 - iii. Manages Facility vendors
 - iv. Manages Lunch program
 - v. Manages Transportation program
 - vi. Manages School Security and Safety program

- vii. Manages Clinic
- f. Manages compliance manager, who:
 - i. Manages compliance with Federal, State and Charter requirements
- g. Manages project coordinator, who:
 - i. Coordinates all special events
 - ii. Coordinates all projects
 - iii. Coordinates FLKRS and FSA testing
 - iv. Coordinates substitute program

4. Principal

- a. Implements School Policies
- b. Performs as Academic Leader of school
- c. Mentors and trains faculty
- d. Manages administrative assistant
- e. Manages dean of students, who:
 - i. Manages K-6 Instructional Staff
 - 1. Teachers
 - 2. Instructional Assistants
 - ii. Manages Discipline Program
 - iii. Manages achievement of grades K-6 SIP goals
- j. Manages Student Services Director
- k. Manages curriculum coordinator, who:
 - i. Manages curriculum selection and procurement planning
 - ii. Manages curriculum alignment to Florida Standards
 - iii. Manages benchmark and diagnostic academic testing
- l. Manages guidance counselor, who:
 - i. Provides mental health assistance
- m. Manages upper school dean who:
 - i. Manages Grades 7-12 instructional staff
 - ii. Manages college advisor (upper school course scheduling)
 - iii. Manages achievement of 7-12 SIP goals

N. Job description for the school leader

Job Description – Principal

The principal will be the school's academic leader. This will be a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The principal will report to the executive director.

The principal's overarching role will be to maintain the integrity of the school's culture and effective learning environment. To accomplish this, the principal will administer and supervise every aspect of the school's daily instructional and academic functions. The principal will set the example for all students, teachers, and staff to maintain a constant atmosphere of civility, trustworthiness, respect, and concern for one another.

The principal's essential duties and responsibilities are as follows:

Leadership

- Implementing and evaluating the school's mission and goals, reporting regularly to the board of directors.
- Maintaining a school atmosphere of academic excellence, civility, trustworthiness, respect, fairness, and equality.

Instructional

- Planning, implementing, and evaluating the school instructional program based on student needs and Florida Standards.
- Setting instructional priorities and goals.
- Ensuring alignment of curriculum with Florida Standards.
- Reviewing teacher lesson plans and instruction to ensure compliance with Florida Standards, the school's mission, and the charter contract.
- Assuring that all academic components of the school's charter are being met.
- Serving as the liaison with Hillsdale College Barney Charter School Initiative.

Administrative

- Recruiting instructional faculty for the school as needed.
- Planning, implementing, supervising, and evaluating all other programs, i.e. athletics, extra-curricular, co-curricular.
- Determining staffing needs including selection, supervision, staff development and evaluation of school instructional personnel.
- Managing state assessment procedures and compliance.
- Reporting instructional employee appointment or dismissal to the board of directors.
- Ensuring the school is operating within the set instructional budget.
- Overseeing the proper academic record keeping processes.
- Maintaining 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.
- Enforcing the policies and procedures of the organization as set by the board of directors, including the student code of conduct.

- Developing and implementing school rules and regulations in keeping with the policies and procedures.
- Attending and participating in meetings of the board and its committees as requested.
- Maintaining knowledge of Charter School Laws and Florida Statutes.

Computer Skills

- To perform this job successfully an individual must have knowledge of accounting software, order processing software, spreadsheet software and word processing software.

Minimum Qualifications

- Candidates should have a solid understanding of classical education and a dedication to the liberal arts and the teaching of civics.
- Preferred candidates will have a master's degree, teaching experience at the K-12 or college level, a record of leadership, and demonstrated abilities in speaking and writing.
- Florida certification as either school principal or educational leadership required within the first year of employment.
- Five (5) years of related professional experience required. Bachelor's degree required, but master's degree (or currently enrolled in) is preferred.

The organization is an equal opportunity employer. The organization is committed to providing equal opportunity for all individuals in all areas of recruitment, selection, placement, training, assignment, transfer, compensation, benefits, discipline, retention, and promotion. The board commits itself to the policy that there shall be no unlawful discrimination against any person because of race, color, religion, age, sex, national origin or disability. All decisions with regard to employment shall be in compliance with applicable state and federal laws.

O. Qualifications the school will look for in a school leader

Qualities the School Leader Must Have for This School to be Successful

The successful candidate for school leader will have a solid understanding of classical education and a dedication to the liberal arts and the teaching of civics. Preferred candidates will have a master's degree, teaching experience at the K-12 or college level, a record of leadership, and demonstrated abilities in speaking and writing.

Key Skills and Competencies

Florida certification as either school principal or educational leadership will be required within the first year of employment. Five (5) years of related professional experience required. Bachelor's degree required, but master's degree (or current enrollment in) is preferred.

The principal must be competent to be responsible for hiring and managing teachers of the highest caliber, effectively implementing a classical liberal arts and civic-minded curriculum, establishing a studious and decorous school culture, and maintaining healthy enrollment. In addition, the principal will work to foster an understanding of liberal arts education and the virtues of school choice among parents and the community at large. In all the principal's work, he/she will draw upon the advice and experience of Hillsdale College Barney Charter School Initiative staff.

The organization is an equal opportunity employer. The organization is committed to providing equal opportunity for all individuals in all areas of recruitment, selection, placement, training, assignment, transfer, compensation, benefits, discipline, retention, and promotion. The board commits itself to the policy that there shall be no unlawful discrimination against any person because of race, color, religion, age, sex, national origin or disability. All decisions with regard to employment shall be in compliance with applicable state and federal laws.

P. Job description(s) and qualification requirements for each administrative or leadership position other than the school leader.

Job Description – Executive Director

The executive director will oversee all academic, operational, financial, compliance, and business administration aspects of the school. This will be a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The executive director will report to the board of directors.

The executive director's essential duties and responsibilities are as follows:

- **Attendance of Governing Board Meetings and Communication with Governing Board**
The executive director will coordinate with the chairperson of the board and charter school principal as to items that need to be placed on the board meeting agendas. The executive director will also coordinate with the board as to its schedule and arrange for proper notice of board meetings as such notice is required by the charter contract and applicable laws. The executive director will provide monthly financial reports to the board, and will also provide back-up items to the board prior to each board meeting to allow for review by board members to be prepared for the board meeting.
- **Administrative Services**
 1. Personnel Management: Non-Instructional Personnel & Principal
Management and professional development of all administrative personnel. Executive director will identify, recommend for hire, train, evaluate, discipline and recommend for termination all non-instructional personnel as well as the school's principal.
 2. Personnel Assistance: Instructional Personnel
Executive director will assist the school board and school principal in identifying, hiring, training, and evaluation of all instructional personnel. Instructional personnel will be accountable to the school principal, who will have the authority to hire, evaluate, discipline, and terminate such personnel.
 3. Facility Operation and Maintenance
Coordinate with entities for the provision of operation and maintenance services for the charter school's facility, together with the management and assessment of the services provided under such contracts and/or the supervision of employees involved in providing such services.
 4. Business Administration
Administration of all business aspects of school operations, including financial management, compliance management (including compliance with state accountability requirements), legal/corporate upkeep, books and records maintenance, and management of equipment/furniture/property. Recommend, manage, oversee and coordinate with human resource and other vendors.
 5. Government Relations
Coordinate and assist with any and all government relations efforts, including maintaining positive relationships with local and state elected officials and staff.
 6. Public Relations
Coordinate and assist with any and all advertising, media and public relations efforts, including outreach programs.
 7. Budgeting, Budgeting Process, Financial and Other Reporting

Prepare a proposed annual budget for board approval.

- a. Prepare budget modifications or amendments as needed.
 - b. Provide the board with enrollment reports and plans to remediate any enrollment shortfalls through student recruitment, borrowing, or cost cutting.
8. Preparation of detailed statements of all revenues and expenses and other financial statements as required, including such documentation as may be reasonably required by the independent certified public accountants.
 9. Preparation of other information on a periodic basis reasonably necessary to enable school board to monitor executive director's performance including the effectiveness and efficiency of school operations.

- **Maintenance of Financial and Student Records**

Executive director will maintain accurate financial and student records pertaining to operation of School.

- **Student Recruitment**

Executive director and the board shall be jointly responsible for the recruitment of students.

- **Rules and Procedures**

Executive director shall recommend to the board reasonable rules, regulations and procedures applicable to the school, and executive director is authorized and directed by the board to enforce the rules, regulations and procedures adopted by the board.

Minimum Qualifications

- Candidates should have a solid understanding of classical education and a dedication to the liberal arts and the teaching of civics.
- Preferred candidates will have a master's degree, teaching experience at the K-12 or college level, a record of leadership, and demonstrated abilities in speaking and writing.
- Five (5) years of related professional experience required. Bachelor's degree required, but master's degree (or currently enrolled in) is preferred.

The organization is an equal opportunity employer. The organization is committed to providing equal opportunity for all individuals in all areas of recruitment, selection, placement, training, assignment, transfer, compensation, benefits, discipline, retention, and promotion. The board commits itself to the policy that there shall be no unlawful discrimination against any person because of race, color, religion, age, sex, national origin or disability. All decisions with regard to employment shall be in compliance with applicable state and federal laws.

Job Description – School Operations Manager

The school operations manager is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The school operations manager will report to the board of directors.

Major Function

The school operations manager performs administrative and supervisory work in the non-academic operations of the organization. This includes student recruitment, budget preparation, financial management and reporting, purchasing, event planning and management, student transportation, the food service program and facilities. He or she works to ensure the operational success of the organization, ensure contractual and regulatory requirements are met, and that resources are managed effectively.

The school operations manager's essential duties and responsibilities are as follows:

Leadership

- Developing and overseeing the evaluation of the organizational philosophy, goals and objectives reflecting organization, Sponsor, and state goals.
- Developing and maintaining a positive school/community climate and a safe and healthy environment conducive for academic success.
- Maintain liaison with outside agencies, including, but not limited to, the Florida Department of Education and the Sponsor.

Administrative

- Arranging for all required government documents to be timely filed to maintain the status of the school as a tax-exempt organization, to maintain up-to-date tax returns, and to maintain any other documents required by the school board, the state of Florida, and the Federal Government.
- Arranging for legal and financial assistance whenever necessary.
- Arranging for the publicity of the organization.
- Assuring that all terms of the contracts held by the organization are being met.
- Attending and participating in all meetings of the board and its committees, except when excused by the board.
- Conducting the enrollment process including applications, lottery, and registration of students.
- Determining staffing needs including selection, supervision, staff development and evaluation of all non-instructional organizational personnel.
- Developing the annual budget, financial statements, and other reports requested by the board. Presenting the budget and financial statements to the board for approval.
- Coordinating fundraising activities, including grant applications, and maintaining liaison with parent fundraising efforts.
- Enforcing the policies and procedures of the organization as set by the board of directors.
- Ensuring that the board of directors is informed of the operations of the school and any problems which arise.
- Maintaining records and necessary reports for efficient operation of organization and compliance with federal, state, and local requirements.
- Maintaining the organization's website.
- Managing finances including the budget and record keeping processes, and inventory control of all organizational resources.

- Managing the hiring, evaluation and termination of all non-instructional employees.
- Supporting the annual financial audit and all other audits and external organizational reviews.
- Overseeing the student transportation program.
- Overseeing the food service program.
- Overseeing, developing and implementing rules and regulations in keeping with the policies and procedures.
- Planning and managing for efficient utilization and maintenance of the organization's facilities, including custodial services, network technology, and building security.
- Recommending changes in bylaws and policies and procedures to the board of directors.
- Reporting to the board on the health of the organization utilizing statistical data and analysis and comparisons to like entities.
- Scheduling meetings of the board of directors, preparing agendas for such meetings and providing public notice as required by law.
- Setting organizational priorities and objectives including enrollment, budget, and capital projects.

Computer Skills

- To perform this job successfully an individual must have knowledge of accounting software, order processing software, spreadsheet software and word processing software.

Minimum Qualifications

- Master's degree in Public Administration or Business Administration or related preferred.
- Five (5) years related professional experience.

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Job Description – Dean of Students

The dean of students is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The dean of students will report to the principal.

Major Function

The dean of students performs administrative and supervisory work in the operational aspects of the school.

The dean of students' essential duties and responsibilities are as follows:

Leadership

Responsible for planning, coordinating, and supervising the day-to-day academic operations of a school office, and serves as administrative aide to the school principal, relieving him/her of administrative details.

- Assists in the recruitment and selection of applicants for school-based academic positions.

- Assists in writing, translating (if bilingual), publication, and distribution of weekly school newsletter.
- Designs in-service training programs at the school.
- Develops, implements, and monitors work practices, systems, and methods that are effective, efficient, and consistent with school standards, policies, and procedures.
- Establishes and maintains professional and cooperative working relationships with all stakeholders: parents, students, staff, neighbors, and partners.
- Establishes programs and communication procedures to encourage committee participation, student organizations, community support and extra-curricular activities.
- Evaluates the work of assigned school staff; provides reports to the principal and cooperates in recognition or remediation of staff members as requested.
- In-services new staff on school and applicable school policies and regulations as they apply to school site operations; standard school site rules and procedures; computer operation and software programs used at the school site; proper use of office equipment; and emergency procedures.
- Investigates circumstances of employee on-the-job injuries; prepares required documentation; and reports safety hazards to the school operations manager.
- Monitors special projects accountability timelines and coordinates timely completion of administrative/clerical tasks.
- Prepares and communicates weekly memo to staff.
- Prepares recess monitor supervision schedule.
- Promotes and maintains a positive and effective school climate by ensuring that all interactions with staff, students, parents, and the public at large are prompt, efficient, helpful and friendly.
- Recognizes problems and impediments and reports them promptly with options for solutions to the principal; promotes and assists with constructive resolutions.
- Recommends changes in programs, personnel, facilities, materials and equipment.
- Respond to and resolve routine internal and external inquiries with parents, employees and school organizations.
- Seeks out and participates in educational and professional development and motivates and encourages such developments for school-classified employees.

Attendance/Discipline

- Develops and maintains student discipline procedures for assigned caseload following established guidelines.
- Establishes attendance and discipline referral and reporting procedures for campus-wide use.
- Develops parental notification procedures.
- Directs the preparation of suspension, neglect, referral and tardy forms.
- Responds to inquiries from welfare, probation, legal and security agencies.
- Creates and serves on committees as necessary inside and outside the school.
- Supervises the enrollment, transfer, discharge, and readmission process for students and the preparation of related records and files.
- Supervises the preparation of student enrollment and attendance report.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- The minimum requirements for this job are as follows: Bachelor's degree in Education or equivalent.

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Job Description – Student Services Director

The **Student Services Director** is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The dean of students will report to the principal.

Major Function

Serves in an educator capacity in the teaching, instruction and guidance of students enrolled in various academic courses within the appropriate grade or academic level, using the general education curriculum, or modifying it, to meet the child's individual needs. Serves as case manager for students with disabilities ensuring implementation of special education and related services.

The Student Services Director's essential duties and responsibilities are as follows:

- Adheres to established standards regarding curriculum delivery and requirements as established by the school and applicable educational systems appropriate to the specified course of discipline.
- Provides professional instruction and teaching to students with disabilities as appropriate to the specified course or discipline and academic level, using various techniques, including individualized and small group instruction, to promote learning.
- Schedules and prepares for IEP meetings annually (and/or more frequently if needed) describing the student's present level of functioning and proposes measurable IEP goals and objectives for team consideration.
- Understands the continuum of programming options that can be used to meet the individual needs of the student to provide an appropriate education.
- Develops individualized educational plans for the provision of specially designed instruction.
- Participates in the review of the individualized education plan with the student's parents, school administrators, and often, the student's general education teacher.
- Collects, documents, and analyzes the student's current progress on his/her individualized educational plan, working closely with parents to inform them of their child's progress and suggest techniques to promote learning at home.
- Organizes and effectively communicates class/course objectives, standards and requirements for successful achievement, e.g., syllabi, tests, specific tasks.
- Provides guidance and assistance to students as needed in order to ensure appropriate assimilation of the class/course content in an effort to support student success and achievement.
- Ensures all appropriate measures, including special accommodations, are in effect for students with disabilities.

- Administers tests and conducts evaluations and grading as applicable to the students' specific assignment.
- Calculates student scores and grades and submits students' final class/course grade(s).
- Helps general education teachers adapt curriculum materials and teaching techniques to meet the needs of students with disabilities.
- Works with students with disabilities in a variety of settings, to include working in one's own classroom teaching only special education students; work as a special education resource teacher and offering individualized help to students in general education classrooms; teach together with general education teachers in classes composed of both general and special education students; or working with special education students for several hours a day in a resource room, separate from their general education classroom. Considerably fewer special education teachers work in homebound or hospitalized environments.
- Uses specialized equipment such as computers with synthesized speech, interactive educational software programs, and audio systems to assist children.
- Refers advanced disciplinary issues to appropriate staff/personnel.
- Functions as part of the problem-solving team(s) at assigned school(s) when appropriate.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- The minimum requirements for this job are as follows: Florida Teacher Certification in Special Education

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Job Description – Curriculum Coordinator

The curriculum coordinator is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. Curriculum coordinator will report to the principal.

Major Function

The curriculum coordinator performs administrative work in the academic operational area of the organization. This includes purchasing curriculum and public relations. He or she works to maintain the integrity of the organization, and that curriculum resources are managed effectively.

The curriculum coordinator's essential duties and responsibilities are as follows:

Administrative

- Maintain organized system of storing all curriculum materials.

- Keeps accurate count of all curriculum inventory throughout year. Updates master Excel file as necessary.
- Obtains quotes from vendors for curriculum.
- Requests purchase orders from business manager when needed.
- Keeps accurate log of signed out material and curriculum.
- Coordinates with teachers for the return of signed out curriculum.
- Creates and serves on committees as necessary inside and outside of the school.
- Assist in the development of budget recommendations for the school.
- Contribute the expertise needed to prepare the school's Riggs' program.
- Manage individual diagnostic testing to enable better prescriptive approaches for classroom instruction.
- Assist the school staff in organizing and managing reading skills as an integral part of all subject areas.
- Provide in-service training for school staff by modeling and coaching in the area of reading and on effective reading strategies for content area instruction.
- Participate in a team-teaching effort with classroom teachers.
- Interpret the reading program for both parents and the community.
- Ensure student and teacher needs are being met by analyzing data regarding student reading and teacher training, and recommend steps to address those needs.
- Participate successfully in the training programs offered to increase the individual's skill and proficiency related to the assignments.
- Review current developments, literature and technical sources of information related to job responsibility.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- Three years broad, varied and increasingly responsible experience with budgeting, computer information systems, and organizational procedures.
- Charter school experience desirable.
- The minimum requirements for this job are as follows: Bachelor's degree in Business Administration, Organizational Management, or related discipline desired.

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Job Description – Upper School Dean

The upper school dean is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The upper school dean will report to the principal.

Major Function

The upper school dean performs administrative and supervisory work in the academic operational area of the organization. He or she works to maintain the integrity of the organization, ensure that resources are managed effectively.

The upper school dean's essential duties and responsibilities are as follows:

Administrative

Responsibilities include the following:

- To maintain congruency between the school's board-approved mission statement and all academic activities.
- To support the academic leader of the school, responsible for its day-to-day operation: scheduling of students, overseeing of the academic advising programs; monitoring student academic progress.
- To observe, supervise, and help evaluate the faculty in the development and implementation of curriculum; to supervise the teaching process, and to review and evaluate the academic programs.
- To oversee and direct the activities of the department chairs, the sponsors of various student organizations and activities, and faculty committees.
- To ensure compliance with legal requirements of government regulations and agencies; to maintain the educational standards established by the state of Florida and by those agencies that examine and accredit the school.
- Monitors and analyzes student performance assessment data preparing reports as needed for various special projects (i.e., after-school program, summer school).
- To make recommendations to the principal regarding the hiring and retention, and the assignment of faculty.
- To establish programs for the orientation of new teachers, for in-service training of all teachers, and for the evaluation of classroom teachers, to ensure that teachers are familiar with and adhere to school policies in all areas of the school operation.
- To conduct regular meetings with faculty and with department chairs, which will deal both with routine school matters and with the stimulating exchange of ideas on issues of educational/philosophical interest and concern.
- To oversee the coordination of the co-curricular and extra-curricular activity programs of the school; to assist in the planning and the presentation of school assemblies and programs; to assist in maintaining a comprehensive calendar of school events; to keep the entire school community informed of various school programs and activities.
- Evaluate incoming transcripts and assign Florida course credit.
- Manage new student credit transfer process.
- Evaluates, interprets and archives high school records from local, in-state, out-of-state, and international educational institutions.
- Orients students and parents regarding current and future educational goals and career objectives.
- To provide for the academic guidance of students; to maintain complete academic records on all students; to oversee the grading and the reporting of standards and methods used by teachers in measuring student achievement.
- To prepare a master school class schedule and to assign teachers and students to classes and other obligations.
- To serve as a mentor to teachers in matters of classroom management, teaching methods, and general school procedures.

- To assist in the admission process for the testing, interviewing, and evaluating of applicants for enrollment.
- To perform other duties as assigned by the principal.
- To support the school and its leadership.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- Three years broad, varied and increasingly responsible experience with teaching, computer information systems, and organizational procedures.
- Charter school experience desirable.
- The minimum requirements for this job are as follows: Bachelor's degree in Business Administration, Organizational Management, or related discipline desired.

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Job Description – College Advisor

The college advisor is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The college advisor will report to the principal.

Major Function

The college advisor performs administrative work in the academic operational area of the organization.

The college advisor's essential duties and responsibilities are as follows:

Leadership

- Developing and overseeing the evaluation of the organizational philosophy, goals and objectives reflecting organization, Sponsor, and state goals.
- Developing and maintaining a positive school/community climate and a safe and healthy environment conducive for academic success.
- Maintain liaison with outside agencies, including, but not limited to, the Florida Department of Education and the Sponsor.

Administrative

- Develops and implements a comprehensive college advising program.
- Translates and authenticates transcripts to conform to school and state requirements for high school graduation.
- Works with students in enrolling in appropriate classes.
- Manage student special processing.
- Manage graduation requirements.

- Manage EOC retakes.
- Manage online course requirement.
- Manage PE/health compliance
- Manage senior transcript creation.
- Validates transcripts for use by government bureaus, universities, courts, military, security agencies, employers, counselors, students, parents and others.
- Translates and authenticates transcripts to conform to school and state requirements for high school graduation.
- Maintains grade point averages, class rankings, honor rolls, PSAT, SAT, and ACT exam results and other student academic data as required.
- Coordinate with colleges to inform them about our school.
- Solicit college representatives to come visit our school to create a word-of-mouth buzz and meet our students.
- Plan and conduct the in-house college fair one evening per school year.
- Maintain a comprehensive list of grants and scholarships.
- Coordinate creation of letters of recommendations for students.
- Support students with college applications.
- Coordinate school student volunteer program.
- Support students with building college resumes.
- Introduce students to community members and other citizens who would like to help their college endeavors.
- Coordinate field trips to colleges.
- Maintain college advising library.
- Maintain school college handbook.
- Provide information about considerations when choosing a college.
- Provide information regarding testing and the role it plays in attending college/earning scholarships.
- Inform students about options for paying for college.
- Inform students about common and required documents needed to apply for college with important dates: FAFSA, FFAA, documented community service hours, Common App, college tests completed, etc.
- Provide clear information about support that is available to high school students for college preparation.
- Ensure that school clubs are in good standing for college resume requirements.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- Master's degree in Public Administration or Business Administration or related preferred.
- Five (5) years related professional experience.

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Job Description – Guidance Counselor

The guidance counselor is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The guidance counselor will report to the principal.

Major Function

The guidance counselor performs administrative work in the academic operational area of the organization.

The guidance counselor's essential duties and responsibilities are as follows:

Administrative

- Develops and implements a comprehensive counseling program that aligns with state guidelines.
- Plans and implements the counseling program to address the academic, career and personal/social needs of every student.
- Coordinates delivery of an annual needs assessment for the counseling program.
- Delivers the four program components: the counseling curriculum, individual student planning, responsive services and system support.
- Provides short-term individual and group counseling opportunities for students to promote school success, personal growth, self-understanding, communication, problem solving and decision-making skills.
- Assists families by providing referrals to outside services for students with acute or chronic mental health needs.
- Assists in curriculum development, professional development and identification of interventions to assist students.
- Consults with administration, staff and parents regarding mental health issues in order to assist students with attitude, learning and/or behavioral problems.
- Serves on the school health/mental health team.
- Assists with test preparation (e.g. test-taking skills, staff training on optimal testing conditions) and interpretation of standardized testing.
- Evaluates the counseling program on an annual basis for continuous improvement.
- Regularly attends counseling meetings to keep current on policies, procedures and best practices regarding school counseling programs and issues.
- Facilitates the development of the school/community social and health assessment as a required component of the state accreditation process.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- Three years of experience in a public-school setting or counseling environment.
- Master's degree in Counseling.
- Guidance Counseling K-12 Certificate

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Job Description – Business Manager

The business manager is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The business manager will report to the school operations manager.

Major Function

The business manager performs administrative and supervisory work in the operational and business area of the organization. This includes budget, financial management and reporting, purchasing, public relations, facilities, and all other non-academic operations of the organization. He or she works to maintain the integrity of the organization, ensure contractual and regulatory requirements are met, and that resources are managed effectively.

The business manager's essential duties and responsibilities are as follows:

Administrative

- Oversees all aspects of financial management. Maintains knowledge of all laws and changes in laws, regulations and rules applicable to school finances. Monitor school compliance with applicable laws, regulations and rules. Monitor and report on school's financial stability.
- Develops annual operating budget details for principal.
- Manages Financial Services firm performing the following:
 - Coordinates the development of, and prepares, school site general fund and special projects budgets; prepares budget transfers as appropriate; monitors charter school budget.
 - Prepares and maintains purchase orders and other expense records; approves, logs, and monitors expenditures; reconciles site records with monthly reports; resolves discrepancies; and ensures expenditures are within budget allowances for the month and year.
 - Responsible for site level procurement of supplies, materials, equipment, and inventory management.
 - Prepares support for annual performance audit in collaboration with school principal.
 - Responsible for site level budget monitoring and management, with input into budget development.
 - Review monthly financial reports and update monthly financial estimate templates.
 - Coordinate with the grant writers for all federal, state, and local grant applications and reporting.
 - Manage and reconcile school's petty cash funds.
 - Provide financial oversight, including invoice approval and developing the substitute teacher budget.
 - Manage accounts payable and payroll processes.

- Oversee, in coordination with the controller, year-end audits as well as any site audits from state or federal agencies.

Human Resources

- Manages human resources services firm performing the following tasks:
 - Prepares necessary forms to hire, upgrade, terminate or authorize special payments to staff.
 - Manage day-to-day activities of designated non-instructional staff.
 - Cooperate with all staff to implement policies and procedures at school (e.g., compensation, vacation/sick days; recruitment screening, background checks, etc.).
 - Oversee the processing of all new hire paperwork.
 - Maintain personnel files for all employees.
 - Lead orientation for new hires.
 - Lead annual performance reviews for non-instructional staff.
 - Serve client and employees, including teachers and school administrators, by handling day-to-day questions and helping resolve work-related problems.
 - Assist in communicating company policies and procedures. Promote understanding within the organization and across the school operations.
 - Recruit for open positions and perform the full life cycle of recruiting activities including sourcing and screening applicants, maintaining recruiting systems, drafting offer letters, providing follow-through with candidates, supporting hiring managers, and reporting recruiting statistics.
 - Draft and update job descriptions; assist in classifying positions and/or reclassifying positions as needed.
 - Lead employee on-boarding activities; answer employee questions and provide support to managers when integrating new hires into the organization.
 - Implement fingerprint-supported background checks and teaching certification of all applicable employees.
 - Administer employee benefit programs, answer employee questions, support claim resolution, and maintain related systems.
 - Support the performance review process; provide employees and managers with information about the process, policies, job duties, and process for promotion.
 - Serve as employee liaison to assist in problem resolution with issues related to benefit deductions and pay.
 - Lead employee recreation and recognition programs.
 - Maintain employee records.
 - Responsible for new hire, termination, and change of status forms with payroll.
 - Coordinate and ensure completion of employee exit interviews. Report outcome of exit interview information to management and tracks/maintains data.
 - Ensure compliance with applicable employment laws and regulations.

Computer Skills

- To perform this job successfully an individual must have knowledge of accounting software, order processing software, spreadsheet software and word processing software.

Minimum Qualifications

- Three years broad, varied and increasingly responsible experience with budgeting, computer information systems, and organizational procedures.
- Charter school experience desirable.

- The minimum requirements for this job are as follows: Bachelor's degree in Business Administration, Organizational Management, or related discipline desired.

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Job Description – Compliance Manager

The compliance manager is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The compliance manager will report to the school operations manager.

Major Function

The compliance manager performs administrative and supervisory work in the operational and business area of the organization. This includes budget, financial management and reporting, purchasing, public relations, facilities, and all other non-academic operations of the organization. He or she works to maintain the integrity of the organization, ensure contractual and regulatory requirements are met, and that resources are managed effectively.

The compliance manager's essential duties and responsibilities are as follows:

Administrative

- Manage submittals to district.
- Manages Florida Safe Schools Assessment Tool (FSSAT).
- Maintain summary information.
- Manage school parent Facebook community.
- Manage student registration history over time.
- Process public records requests.
- Manage mass email system contacts.
- Manage student parking program.
- Manage school supply program.
- Manage school academic calendar creation and update.
- Manage out-of-field letters.
- Manage required annual parent notification of board members' contact information.
- Manage required annual parent notification of parent representative.
- Provide tours for prospective parents during registration decision process.
- Manage school profile edits.
- Manage annual accountability report submittal.
- Manage salary schedule calculator - annually.
- Manage required annual parent notification - third-grade retention.
- Manage progression plan edits and submittal.
- Manage student FSA/EOC results database.
- Manage school FSA/EOC results database.

- Manage student grade adjustment based on 30 percent EOC impact.
- Manage required annual parent notification - Student Progression Plan.
- Manage Code of Student Conduct submittal.
- Manage Mental Health Assistance Plan submittal.
- Manage website statute required updates.
- Best Practices for Inclusive Education (BPIE)

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- Three years broad, varied and increasingly responsible experience with budgeting, computer information systems, and organizational procedures.
- Charter school experience desirable.
- The minimum requirements for this job are as follows: Bachelor's degree in Business Administration, Organizational Management, or related discipline desired.

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Job Description – Project Coordinator

The project coordinator is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The project coordinator will report to the school operations manager.

Major Function

The project coordinator performs administrative work in the operational and business area of the organization.

The project coordinator's essential duties and responsibilities are as follows:

Special Projects

- Supervises requisitions, receives, and distributes/stores classroom, school office and work room materials and supplies; maintains ongoing inventory; processes packing slips.
- Secures childcare coverage for special events.
- Prepares and processes field trip requests.
- Manages after-school clubs.
- Manages yearbook program.
- Supports curriculum coordinator in curriculum program.
- Manages movie nights.
- Manage planning school website event calendar.
- Manage school picture program.

- Plan and implement kindergarten through sixth grade open house.
- Plan and implement upper school open house.
- Planning graduation.
- Planning prom.
- Setting up and running staff vs students' sports events.
- Supporting talent show grades K-4.
- Supporting talent show grades 5-12.
- Approve facility reservation request on school website backend.
- Deliver incoming items for reception.
- Deliver material to staff mailboxes when needed.
- Help in dismissal process when they need extra hands.
- Deliver mail.
- Manage lost and found.
- Manage uniform assistance program.
- Manage classroom supply program.
- Manage FLKR testing.
- Identify student EOC testing requirements.
- Conduct FSA pre-test.
- Create and maintain detailed FSA test plan.
- Manage FSA testing.
- Prepare and test technology for FSA pre-test.

Staffing, Certification and Endorsement Program

- Manages staff onboarding program.
- Submits staffing forms to district.
- Maintains and reports on staff roster to district.
- Manages the tracking and completion of staff certification and endorsement.
- Submits certification and endorsement status to district.

Substitute Program

- Manage the substitute program.
- Increases substitute pool.
- Conducts substitute onboarding and orientation.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- Master's degree in Public Administration or Business Administration or related preferred. Five (5) years related professional experience.

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Job Description – Facility Manager

The facility manager is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The facility manager will report to the school operations manager.

Major Function

The facility manager performs administrative and supervisory work in the operational and business area of the organization. This includes budget, financial management and reporting, purchasing, public relations, facilities, and all other non-academic operations of the organization. He or she works to maintain the integrity of the organization, ensure contractual and regulatory requirements are met, and that resources are managed effectively.

The facility manager's essential duties and responsibilities are as follows:

Building and Grounds

- Supervise school employees and custodial services firm completing custodial and maintenance tasks on campus.
- Processes, assigns, trains, and directs work of copy room volunteers.
- Oversees custodial work.
- Oversees maintenance work.
- Verifies completion of work orders in Facility Help Desk.
- Contacts security as necessary
- Serves as daily contact for outside facility contractors
- Assist in the development of budget recommendations for the school.
- Scrutinizes facility wear and tear and makes recommendations as to facility improvement (i.e., carpet replacement, exterior and interior paint, turf).
- Prepares and processes facility use agreement forms using established school procedures.
- Manage security access system.
- Manage key control program.
- Supervises student medication dispensation and injury reports.

School Readiness Program

- Conducts and reports on fire and tornado drills.
- Coordinates and reports on health and safety inspections.
- Coordinates and reports on fire inspections.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- Three years broad, varied and increasingly responsible experience with budgeting, computer information systems, and organizational procedures.
- Charter school experience desirable.
- The minimum requirements for this job are as follows: Bachelor's degree in Business Administration, Organizational Management, or related discipline desired.

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Job Description – Registrar

The registrar is a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The registrar will report to the school operations manager.

Major Function

The registrar performs administrative work in the operational area of the organization.

The registrar's essential duties and responsibilities are as follows:

- Maintain the database for the school.
- Make corrections to the edit reports for the school.
- Input daily attendance for all students.
- Maintain registrations for all new and returning students.
- Request for all cumulative for all new students and forward cumulative folders when student withdraws.
- File all forms into cumulative folders.
- Serves as the custodian of school office records.
- Manage the admissions and lottery process.
- Manage annual enrollment process.
- Manage registration status.
- Tend to sick and injured children, administer medication and log same in clinic book.
- Do all vision screening; height and weight logs and report outcome to parents.
- Performs all clerical functions related to enrolling and withdrawing students.
- Requests records and grades from other schools for current students' files.
- Supervises the preparation of student enrollment and attendance report.
- Inputs student information into the school's district's student information systems.
- Creates the accounts and password for families.
- Collects, compiles and tracks TDAP information for incoming 7th grade students.
- Prepares school district reports for FTE, minutes, missing data, and survey edit reports.
- Responds to student records requests.
- Coordinates and schedules hearing and vision screening dates and times for Grades K-3 and sixth-grade students.
- Prepares necessary forms for record keeping.
- Sends records CUMs, report cards and FSA scores to the school district and future schools.
- Oversees the filing and paperwork maintained in the CUMs.
- Receives CUMs from other schools.
- Make necessary student data corrections for FLDOE.
- Follow up with parents that do not complete the "Intent to Return" paperwork for existing students.

- Disposition of student's permanent records report for the school district.
- Enter student referrals into the school district's student information system.
- Update students retained/promotion information in the school district's student information system.
- Supervises the maintenance of student records, including assessment results, test scores, discipline citations, medical reports and records, and other documents.
- Enter faculty training, absence, and termination information into the school district's computer systems.
- Update FTE minutes in the district's student information system.
- Work with school personnel to maintain integrity and accuracy of student records, including maintenance and tracking of attendance and retention.

Computer Skills

- To perform this job successfully an individual must have knowledge of spreadsheet software and word processing software.

Minimum Qualifications

- Two to five years related experience and/or training.
- High school diploma.
- Charter school experience desirable.

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Job Description – School Resource Officer

The school resource officer is provided to the school by a contract with the Collier County Sheriff's Office. The school resource officer will report to the school operations manager.

Major Function

Position is an armed school resource officer (SRO) position; shall be to prevent or abate an active assailant incident on Naples Classical Academy school premises. Maintains calm, deters crime, and handles preliminary inquiries into violations of school-board policies, on school property or at school-sponsored events. Ensures the safety, security, and welfare of all students, faculty, staff, and visitors in the assigned school. Assists the administrative staff with applying policies and procedures for safe and orderly schools at the building level.

The school resource officer's essential duties and responsibilities are as follows:

- Uses whatever force is necessary to prevent or abate an active assailant incident.
- Conducts perimeter and inner-school checks to ensure premises are secure.
- Monitors students within a variety of school environments (e.g. restrooms, grounds, hallways, library, cafeteria, parking lots, etc.) for the purpose of ensuring the safety and welfare of students.

- Refers observations and incidents (e.g. injuries, altercations, suspicious activities, inappropriate social behavior, violations of rules, etc.) to communicate information to appropriate instructional and/or administrative personnel for follow- up action.
- Assist with administrative searches when directed to do so by the principal or designee.
- Participates in all school emergency drills (fire, code red, etc.).
- Prepares a variety of documents (e.g. security logs, memos, letters, procedures, etc.) to document activities, providing written reference and/or conveying information. Reads and responds to email communications.
- Performs other duties as assigned.

Q. Job description(s) and qualification requirements for the school's teachers

Teacher job descriptions are created based on templates provided by the Florida Charter Support Unit.

Job Description – Teacher

This is a salaried, exempt position with a 10-month work schedule and base standard hours of 7:30 am to 4:00 pm daily. Salary will be set annually on a performance-based schedule. Teachers will report to the principal.

Major Function

Instructional position responsible for the educational leadership of students in a group or class in an innovative charter school. The educational leader will understand, demonstrate the use of, and implement the school's curriculum, student instruction, and assessment to maximize educational achievement for all students, and work collaboratively to ensure a working and learning climate for all students that is safe, secure, and respectful. Implementation of strategies to reach the multiple intelligences of students through creative lessons is required.

Teachers' essential duties and responsibilities are as follows:

- Demonstrating an understanding of and commitment to classical education and the vision, mission, and philosophy of the school, and consistently developing, fostering, and advancing these concepts in students.
- Demonstrating understanding and mastery of central concepts, tools of inquiry, and structure of the discipline(s) taught, and effectively transmitting this knowledge to students, and making the subject matter meaningful to students.
- Developing and maintaining a climate and culture of openness, fairness, mutual respect, kindness, support, and inquiry.
- Engaging every student in grade level-appropriate learning experiences that promote performance and intellectual and moral development.
- Listening and interacting effectively with students, parents, colleagues, leadership, and community members, respecting diverse perspectives.
- Demonstrating respect for students, colleagues, administrators, and parents.
- Modeling and reinforcing good judgment, prudence, virtue, self-discipline, and responsibility.
- Working effectively with school leadership and colleagues, parents, and the community to support students' learning and well-being.
- Providing professional leadership to establish a culture conducive to intellectual and moral development, knowledge acquisition, thinking, analysis, learning, and student diversity; involving students in the development of a mission and goals that support the school's goals and guide classroom decisions, and using data effectively for continual improvement.
- Developing and implementing a strategic planning system including course, unit, and lesson plans.
- Providing opportunities for students to demonstrate appropriate progress toward graduation expectations: knowledgeable, lifelong learner; responsible individual; effective communicator; problem solver; collaborative team worker, and self-directed learner.
- Providing students and parents with timely data for improvement in student achievement.
- Using formal and informal assessment strategies to determine whether students have achieved high standards and modifying instructional strategies as needed to maximize achievement.

- Demonstrating an understanding of how students learn and provides learning opportunities that support intellectual, social, and personal development of diverse learners.
- Establishing and maintaining a safe and secure classroom environment.
- Managing student misconduct promptly and resolving conflict and crises effectively.
- Promoting both independent and collaborative work ethics.
- Developing and managing human resources within the classroom by maintaining a professional development plan and engaging in professional development activities, recognizing students and parents for contributions to goal achievement.
- Using teaching and learning strategies that reflect each student's culture, learning styles, special needs, and socioeconomic background.
- Seeking resources necessary to achieve classroom and school goals, such as course materials that match the reading levels of students.
- Using classroom processes that support effective teaching and learning to promote high student achievement, designing lessons to promote all students' being engaged in learning all the time through such strategies as active learning, hands-on application, and teacher-student and student-student conversations about the learning.
- Using appropriate technology in teaching and learning processes, record keeping, assessment, evaluation, and performance analysis.
- Demonstrating positive classroom results and trends.
- Performing other related duties as required.

Minimum Qualifications

- Bachelor's degree from a fully accredited college or university.
- Possession of, or eligibility for, a Florida teaching certificate for the level and subject area to be taught.
- Preferred Florida certification in the elementary education and/or the middle grades.
- Integrated curriculum (Grades 5-9) licenses.

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Job Description – Music Teacher

This is a salaried, exempt position with a 10-month work schedule and base standard hours of 7:30 am to 4:00 pm daily. Salary will be set annually on a performance-based schedule. Teachers will report to the principal.

Major Function

This is an instructional position with responsibility for establishing music as a vital living experience in the life of each child. The teacher is expected to understand and demonstrate effective student instruction and assessment to maximize educational achievement for all students, and work collaboratively to ensure a working and learning climate for all students that is safe, secure and

respectful. Implementing strategies to reach the multiple intelligences of students through creative lessons is required.

The music teacher's essential duties and responsibilities are as follows:

- Demonstrating an understanding and mastery of central concepts, tools of inquiry, and structure of the discipline(s) taught, effectively transmitting this knowledge to students, and making the subject matter meaningful to students.
- Demonstrating an understanding of and commitment to classical education and the vision, mission, and philosophy of the school, and consistently developing, fostering, and advancing these concepts in students.
- Planning a program that incorporates and teaches the Florida Standards.
- Guiding students to enjoy, appreciate and interpret music in his/her daily life.
- Encouraging and assisting students to acquire skills in music through a series of sequential experiences.
- Encouraging students to develop their own creativity by providing opportunities for creativity in each experience area.
- Encouraging and promoting the coordination of music with other subject areas in the curriculum.
- Determining the materials to be used in instruction and planning the best methods for presenting them.
- Assisting in planning, preparing, and presenting programs, field trips, and festivals for the school.
- Evaluating student performance in music.
- Planning in-depth experiences for special groups or individuals based on student needs.
- Assisting the principal and staff in inventorying, organizing, ordering, and caring for music materials and equipment.
- Maintaining students' grades.
- Developing and maintaining a climate and culture of openness, fairness, mutual respect, kindness, support, and inquiry.
- Listening and interacting effectively with students, parents, colleagues, leadership, and community members, respecting diverse perspectives.
- Demonstrating respect for students, colleagues, administrators, and parents.
- Modeling and reinforcing good judgment, prudence, virtue, self-discipline, and responsibility.
- Developing and implementing a strategic planning system including course, unit, and lesson plans.
- Providing students and parents with timely data for improvement in student achievement.
- Promoting independent and collaborative work ethic.
- Establishing and maintaining a safe and secure classroom environment.
- Managing student misconduct promptly and resolving conflict and crises effectively.
- Working effectively with school colleagues, parents, and the community to support students' learning and well-being.
- Performing other related duties as required.

Minimum Qualifications

- Bachelor's degree from an accredited college or university.
- Certification and competency in music education, K-12.
- Understanding and knowledge of child development.

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Job Description – Art Teacher

This is a salaried, exempt position with a 10-month work schedule and base standard hours of 7:30 am to 4:00 pm daily. Salary will be set annually on a performance-based schedule. Teachers will report to the principal.

Major Function

This position has responsibility for designing significant learning experience in art for the individual child. These experiences include the development of the student's perceptual and community skills through the use of visual art. The teacher is expected to understand and demonstrate effective student instruction and assessment to maximize educational achievement for all students, and work collaboratively to ensure a working and learning climate for all students that is safe, secure and respectful. Implementing strategies to reach the multiple intelligences of students through creative lessons is required.

The art teacher's essential duties and responsibilities are as follows:

- Demonstrating an understanding and mastery of central concepts, tools of inquiry, and structure of the discipline(s) taught, effectively transmitting this knowledge to students, and making the subject matter meaningful to students.
- Demonstrating an understanding of and commitment to classical education and the vision, mission, and philosophy of the school, and consistently developing, fostering, and advancing these concepts in students.
- Developing a climate and culture of openness, fairness, mutual respect, kindness, support and inquiry.
- Engaging every student in grade level appropriate learning experiences that promote performance and intellectual and moral development.
- Listening and interacting effectively with students, parents, colleagues, leadership, and community members, respecting diverse perspectives.
- Demonstrating respect for students, colleagues, administrators, and parents.
- Modeling and reinforcing good judgment, prudence, virtue, self-discipline and responsibility.
- Working effectively with school colleagues, parents, and the community to support students' learning and well-being. Providing professional leadership to establish a culture conducive to students' learning and well-being, involving students in the development of a mission and goals that support the school's goals and guide classroom decisions, and using data for continual improvement.
- Providing professional leadership to establish a culture conducive to intellectual and moral development, knowledge acquisition, thinking, analysis, and learning.
- Developing and implementing a strategic planning system including course, unit and lesson plans.

- Providing opportunities for students to demonstrate appropriate progress toward graduation expectations: knowledgeable, lifelong learner; responsible individual; effective communicator; problem solver; collaborative team worker, and self-directed learner.
- Providing students and parents with timely data for improvement in student achievement.
- Using formal and informal assessment strategies to determine whether students have achieved high standards and modifying instructional strategies as needed to maximize achievement.
- Understanding how students learn and providing learning opportunities that support intellectual, social, and personal development of diverse learners.
- Establishing and maintaining a safe and secure classroom environment.
- Managing student misconduct promptly and resolving conflict and crises effectively.
- Promoting both independent and collaborative work ethics.
- Developing and managing human resources within the classroom by maintaining a professional development plan and engaging in professional development activities, recognizing students and parents for contributions to goal achievement.
- Using teaching and learning strategies that reflect each student's culture, learning styles, special needs, and socioeconomic background.
- Seeing resources necessary to achieve classroom and school goals, such as course materials that match the reading level of students.
- Using classroom processes that support effective teaching and learning to promote high student achievement, designing lessons to promote all students' being engaged in learning all the time through such strategies as active learning, hands-on application, and teacher-student and student-student conversations about the learning.
- Using appropriate technology in teaching and learning processes.
- Demonstrating positive classroom results and trends.
- Performing other related duties as required.

Minimum Qualifications

- Bachelor's degree from an accredited college or university.
- Certification and competency in art education, K-12.
- Understanding and knowledge of child development.

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Job Description – Gifted/ESE Teacher

This is a salaried, exempt position with a 10-month work schedule and base standard hours of 7:30 am to 4:00 pm daily. Salary will be set annually on a performance-based schedule. Teachers will report to the principal.

Major Function

Responsible for the educational leadership of students placed in exceptional student education programs, including gifted students and students with disabilities. 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 ensure a working and learning climate for all students that is safe, secure and respectful. Implementing strategies to reach the multiple intelligences of students through creative lessons is required.

The Gifted/ESE teachers' essential duties and responsibilities are as follows:

- Working cooperatively with assigned district staffing specialist and ADAPT (Admissions Diagnostics and Placement Team) to initiate and complete pre-referrals for ESE, utilizing pre- and post-test assessments, interventions and observations in areas of concern.
- Working cooperatively with parents and teachers to identify students as potentially eligible for gifted program services. Conducting screenings to determine need for further evaluation for eligibility; collecting characteristics data and administers Kaufman Brief Intelligence Testing. Developing appropriate Individual Educational Plans (IEPs), Gifted Educational Plans (EPs) or Academic Improvement Plans (AIPs), and Behavior Success Plans (BSPs), including determining present levels of performance, annual goals, and benchmarks or short-term objectives.
- Demonstrating an understanding of and commitment to classical education and the vision, mission, and philosophy of the school, and consistently developing, fostering, and advancing these concepts in students.
- Collecting student performance data and reporting student progress toward IEP/EP goals.
- Supporting general education teachers in implementing appropriate accommodations or enrichment/acceleration strategies.
- Scheduling and conducting IEP/EP meetings with parents and appropriate school and agency personnel. Completing matrix of services if required.
- Maintaining and/or overseeing specialized therapists' (i.e. SP, OT) maintenance of ESE case management records.
- Regularly reviewing and providing updated information for SASI.
- Reporting Full Time Equivalency (FTE) accurately.
- Participating in eligibility determination meetings.
- Serving as Local Education Agency (LEA) representative, if designated by administrator.
- Participating in professional development activities relating to performing job responsibilities.
- Demonstrating knowledge of Individuals with Disabilities Education Act (IDEA) and implementing all requirements.
- Planning and delivering instruction designed to assist students with disabilities in mastering the Florida Standards.
- Planning and developing curricula designed to address the Florida Standards for gifted students and delivering instruction that effectively challenges their higher-level thinking skills.
- Assisting in the development of appropriate interventions for students suspected of having a disability.
- Participating in developing Functional Behavior Assessments (FBAs) and implementing Behavior Improvement Plans (BIPs) for students with disabilities.
- Participating in manifestation determination meetings.
- Supervising teacher assistant in providing instruction for students, as required.
- Consulting regularly with school administrators on ESE issues.
- Performing other related duties as assigned.

Minimum Qualifications

- Bachelor's degree from a fully accredited college or university.

- Possession of, or eligibility for, a Florida Educators certificate required by the Florida Department of Education (ESE, EH, EMH, MH, MR or SLD, and a Gifted endorsement). This includes both certification in the appropriate exceptional student area(s) and any content certification required by federal education regulations.

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Naples Classical Academy Employee Policies and Procedures Manual

Updated November 19, 2018

This Policy Manual was adapted from the template provided by the Florida Charter Support Unit

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3 Employment Manual

3.1 Equal Opportunity Employment

The organization is an equal opportunity employer. The organization is committed to providing equal opportunity for all individuals in all areas of recruitment, selection, placement, training, assignment, transfer, compensation, benefits, discipline, retention, and promotion. The board commits itself to the policy that there shall be no unlawful discrimination against any person because of race, color, religion, age, sex, national origin or disability. All decisions with regard to employment shall be in compliance with applicable state and federal laws.

The organization is required by the Immigration Reform and Control Act to employ only American citizens and aliens who are authorized to work in the United States. The purpose of this law is to preserve jobs for those individuals who are legally entitled to them.

3.2 Employment Non-Discrimination and Non-Harassment

Naples Classical Academy does not discriminate against anyone, in general operations of the organization, or on any basis prohibited by applicable law or regulation.

Naples Classical Academy is committed to an environment in which all individuals are treated with respect and dignity. We believe that each individual has the right to work in a professional atmosphere that promotes equal employment opportunities and prohibits discriminatory practices, including harassment. Therefore, the organization expects that all relationships among persons in the workplace will be professional, business-like and free of bias, prejudice, and harassment. Thus the organization does not and will not tolerate discrimination against or harassment of or by our employees, students, vendors, or other person. The term “harassment” includes, but is not limited to, slurs, jokes, and other verbal, graphic, or physical conduct relating to an individual’s race, color, sex (including discrimination against or harassment of individuals of the same sex), pregnancy, religion, national origin, ancestry, citizenship, age, disability, workers compensation claims, marital, veteran or any other protected status.

“Harassment” may include a range of subtle to overt behaviors and also includes unwelcome or unwanted sexual advances, requests or demands for favors, offensive touching, and other types of conduct whether it be physical, verbal, graphic, or electronic communication (including e-mail and facsimiles) of a harassing or sexual nature involving individuals of the same or different gender. This includes, but is not limited to:

- Unwelcome or unwanted physical contact or sexual advances including, but not limited to, patting, grabbing, pinching, brushing-up against, hugging, cornering, kissing, fondling, or any other similar physical contact.
- Unwelcome requests or demands for favors including, but not limited to, subtle or blatant expectations, pressures, requests or demands for sexual, unethical or illegal favors; or unwelcome requests for dates or contacts. Such unwelcome requests or demands may or may not relate to an implied or stated promise of preferential treatment, or a threat of negative consequences concerning employment, including, but not limited to, promotion, demotion, transfer, layoff,

termination, pay or other form of compensation, and selection for training.

- Verbal and written abuse or unwelcome kidding including, but not limited to, that which is sexually-oriented, including same-sex harassment; commentary about an individual's body, sexual prowess or sexual deficiencies; inappropriate comments about race, color, religion, sex, pregnancy, national origin, ancestry, citizenship, age, disability, workers compensation claims, marital, veteran or other protected status; dirty jokes or other jokes which are unwanted and considered offensive or tasteless; or comments, innuendoes, epithets, slurs, negative stereotyping, leering, catcalls or other actions that offend, whether sexually oriented or otherwise related to a prohibited form of discrimination or harassment.
- Any form of behavior that unreasonably interferes with work performance, including, but not limited to, unwanted sexual attentions, comments, interruptions, or other communications, whether sexually-oriented or otherwise related to a prohibited form of discrimination or harassment, that reduces productivity or time available to perform work-related tasks or otherwise interferes with work performance.
- Actions that create a work environment that is intimidating, hostile, abusive, or offensive because of unwelcome or unwanted conversations, suggestions, requests, demands, physical contacts or attentions, whether sexually-oriented or otherwise related to a prohibited form of discrimination or harassment.
- The distribution, display, or discussion of any written or graphic material, including calendars, posters, cartoons, or names, that belittles or shows hostility or aversion toward an individual, his/her relatives, friends or associates or a group because of race, color, religion, sex, pregnancy, national origin, ancestry, citizenship, age, disability, workers compensation claims, marital, veteran or other protected status.

All employees and applicants are covered by this policy and are strictly prohibited from engaging in any form of discriminatory or harassing conduct. Further, no employee has the authority to suggest to another employee or applicant that the individual's employment, continued employment, or future advancement will be affected in any way by entering into, or refusing to enter into, a personal relationship. Such conduct is a direct violation of this policy.

Conduct prohibited by this policy is unacceptable in the workplace and in any work-related setting outside the workplace, such as business trips, business meetings and business-related social events.

Violation of this policy will subject an employee to disciplinary action, up to and including immediate discharge.

3.2.1 Retaliation is Prohibited

Naples Classical Academy prohibits retaliation against any individual who reports discrimination or harassment or participates in an investigation of such reports. Retaliation against an individual for reporting harassment or discrimination or for participating in an investigation of a claim of harassment or discrimination is a serious violation of this policy and, like harassment or discrimination itself, will be subject to disciplinary action, up to and including termination.

3.2.2 Reporting Procedures and Investigation

Naples Classical Academy strongly urges the reporting of all incidents of discrimination, harassment or retaliation, regardless of the offender's identity or position. Individuals who believe they have experienced conduct they believe is contrary to the organization's policy or who have concerns about such matters should file their complaints with the principal, school operations manager or the board of directors, whereupon the matter will be discreetly and thoroughly investigated. The organization will then take immediate steps to stop any behavior which violates this policy and reasonably ensure that it does not repeat itself. Disciplinary action, up to and including termination, calculated to end the discrimination or harassment, will be taken, when appropriate, against the offender(s).

Employees who have experienced conduct they believe is contrary to this policy have an obligation to utilize this complaint procedure. An employee's failure to fulfill this obligation could affect his or her rights in pursuing any claim.

Early reporting and intervention have proven to be the most effective method of resolving actual or perceived incidents of discrimination or harassment. Therefore, while no fixed reporting period has been established, the prompt reporting of complaints or concerns is strongly urged so that rapid and constructive action can be taken.

The availability of this complaint procedure does not preclude individuals who believe they are being subjected to harassing conduct from promptly advising the offender that his or her behavior is unwelcome and requesting that it be discontinued. Individuals who believe they are being subjected to harassing conduct are expected and encouraged, where circumstances allow, to promptly advise the offender that his or her behavior is unwelcome and to request that it be discontinued prior to initiating this complaint procedure.

3.2.3 Responsive Action

Conduct constituting harassment, discrimination or retaliation will be dealt with appropriately. Responsive action may include training, referral to counseling and/or disciplinary action such as warning, reprimand, withholding of a promotion or pay increase, reassignment, temporary suspension without pay, or termination, as the organization believes appropriate under all of the circumstances.

Any person utilizing this complaint resolution procedure or who is the subject of it will be treated courteously, and the problem will be handled as swiftly and as confidentially as possible in light of all the circumstances, with appropriate corrective action being taken. The registering of a complaint will in no way be used against that individual, nor will it have an adverse impact on their employment status. A record of the complaint and findings will become a part of the complaint investigation record and that file will be maintained separately from the personnel files.

3.2.4 Conclusion

Individuals who have questions or concerns about this policy may talk with the principal, school operations manager or the board of directors.

Please keep in mind that the very nature of discrimination, harassment and retaliation makes it virtually impossible to detect unless a complaint is appropriately reported. Do not assume that the organization

is aware of your problem! It is your responsibility to bring this information to the attention of the organization so the issue can be resolved.

3.2.5 Training

New employee orientation training shall include a component on the harassment policy. All administrators are responsible for assuring that their staff members are familiar with the policy on harassment and that new employees are oriented as necessary throughout each school year. As part of the review of the Code of Student Conduct at the beginning of the school year, this policy will be discussed in student classes, school advisory councils, and parent and teacher associations. Students enrolled after the beginning of the school year will be provided a copy of the Code of Student Conduct and advised of this policy.

3.3 Personnel Records

Personnel records shall be maintained in accordance with state and federal laws. The following records for each employee shall be maintained in a secure file:

- a. Evidence of successful completion of required education
- b. Florida Teaching Certificate, certificate of law for the position
- c. Employee assessments
- d. Signed contract (if required)
- e. Signed loyalty oath if required by the state of Florida or the Federal Government.
- f. Withholding allowance certificate (W-4)
- g. Copy of Social Security Card
- h. Benefits enrollment documentation
- i. Background verification (results of School District fingerprint test)
- j. Letters of reprimand and information regarding any disciplinary action taken
- k. Personal Data Sheet
- l. Employment Eligibility Verification (I9 Form and/or any state or federal verification tool such as E-verify)
- m. Arrest and Conviction Record
- n. Drug-Free Workplace Policy.
- o. Application materials, including employee resume, application, and attachments thereto, such as letters of recommendation, cover letters, work samples, etc.

It is the responsibility of the employee to obtain and submit these documents:

- a. **Florida Certificate:** the employee must submit the original. A copy shall be made to keep within the file, and the original shall be returned to the employee.
- b. **Health Certificate:** Prior to initial employment and re-employment following a termination, some employees may be required to submit a certificate of health signed by a licensed medical practitioner attesting to the employee's freedom from contagious and infectious diseases and other physical and medical impairments which would prevent the applicant from performing the duties under the employment contract.
- c. **Contracts:** Each employee shall sign the offered contract and submit it to the school office within the specified time.
- d. **Certificate Extensions/Additions:** Other official correspondence with the state Department of Education and any other documents which may be requested shall be copied in the school office. Copies shall be retained and the originals shall be returned to the employee.
- e. **Criminal Records:** The school shall make a reasonable effort to determine if the prospective employee has an arrest/conviction record.

Personnel records shall be open for inspection and copying consistent with Florida law, Chapter 119, and federal laws. Social Security numbers will not be disclosed to the public. Evaluations shall be confidential and not open to the public until the end of the school year immediately following the school year in which the evaluation was made. The following payroll deductions are not open to the public: credit union cards, W-4's, tax shelter information, tax levy, court records.

3.4 Compensation and Benefits

3.4.1 Salaried Employees

Instructional and administrative staff members shall be salaried employees. Salaries shall be set in accordance with schedules adopted by the board of directors of the school, and in accordance with state and federal law.

3.4.1.1 Initial Salary Placement

The initial placement on the salary schedule shall be based upon the relevant experience held by the employee on their first day of work.

3.4.1.1.2 Experience

Experience credit on the instructional salary schedule will be granted for all verified classical school experience in accordance with state law.

3.4.1.2 Benefits

3.4.1.2.1 Paid Time Off

Salaried employees will be granted Paid Time Off (PTO) within the contract/agreement with the organization.

All full-time employees are eligible. Temporary, part-time and PRN employees are not eligible. PTO accumulates in relationship to all regular hours actually worked. PTO does not accumulate on a leave of absence. You may begin using your PTO at any time after it accumulates; however, you may not use PTO in advance of any accumulation of it.

<u>Years of Employment</u>	<u>Accumulation Multiplier</u>	<u>Approximate Weeks Off for Full Time Employees</u>
Year 1	0.042017	(2 weeks)
Year 2-5	0.064378	(3 weeks)
Year 6 and on	0.087719	(4 weeks)

3.4.1.2.2 Approval

PTO requests must be approved by the employee's immediate supervisor prior to the absence, unless the absence is a sick-day and prior notification is not possible.

3.4.1.2.3 Overuse of PTO

If a staff member uses all PTO allotted to them, any additional sick days will be without pay. PTO time will be awarded at the beginning of the school year; should an employee leave before the end of the school, PTO will be prorated and the employee will be expected to pay back over-used PTO.

3.4.1.2.4 Unused PTO for Salaried Employees

Salaried employees are encouraged to use their PTO time during the fiscal year in which it accrues (July 1 – June 30); however, up to forty (40) hours of accrued PTO time may be carried forward to the following fiscal year. No more than forty (40) hours may be carried forward into the next year.

3.4.1.3 Holidays

Salaried employees who normally work during the times of year when the following holidays occur will be provided holiday pay for them.

Paid Holidays Time

- Independence Day
- Labor Day
- Thanksgiving (total of 3 days)
- Winter Break (total of 5 days - Schedule to be determined by the school operations manager or designee)
- Martin Luther King, Jr. Day
- Memorial Day

3.4.2 Hourly Employees

Non-instructional and non-administrative employees shall be paid hourly. Hourly rates will be set by the board of directors of the school and in accordance with state and federal law.

3.4.2.1 Initial Compensation

Hourly employees shall be offered a specific hourly rate based on the rates paid to similar employees at other local schools.

3.4.2.2 Holidays

Hourly employees who normally work during the following times will be provided holiday pay for the following days. The amount to be paid will be based on the annual average hours worked per day, which is calculated by finding the sum of hours in the work agreement with the employee divided by 52, divided by 5.

Paid Holidays Time

- Independence Day
- Labor Day
- Thanksgiving (total of 3 days)
- Winter Break (total of 5 days - Schedule to be determined by the school operations manager or designee)
- Martin Luther King, Jr. Day
- Memorial Day

3.4.2.3 Overtime Pay

Whether an employee is exempt from or subject to overtime pay will be determined on a case-by-case basis and will be indicated in the employee's job description.

Non-exempt employees may be required to work beyond the regularly scheduled workday or workweek as necessary. In determining whether non-exempt employees are entitled to overtime pay, only actual hours worked in a given workday or workweek will be considered. All overtime work must be previously authorized by the school operations manager or designee. The organization provides compensation for all overtime hours worked by non-exempt employees in accordance with state and federal law as follows:

For employees subject to overtime, all hours worked in excess of eight (8) hours in one workday or forty (40) hours in one workweek shall be treated as overtime. Compensation for hours in excess of forty (40) for the workweek or in excess of eight (8) but not more than twelve (12) for the workday, and for the first eight (8) hours on the seventh consecutive day in one workweek, shall be paid at a rate of one and one-half times the employee's regular rate of pay. Compensation for hours in excess of twelve (12) in one workday and an excess of eight (8) on the seventh consecutive workday of the workweek shall be paid at double the regular rate of pay. Workweeks begin each Sunday at 12:01 a.m.;

3.4.3 Benefits

The organization provides a comprehensive Benefit Plan which may vary from year to year as determined by the board of directors.

3.4.3.1 Eligibility

Regular employees who work at least thirty (30) hours per week including job-share employees are eligible for benefits, per individual contracts.

- **Initial Enrollment:** Enrollment and change forms are due in the office within thirty (30) calendar days of hire or change of eligibility status. Coverage becomes effective the first day of the month following thirty (30) days of employment in an eligible benefit status.
- **Open Enrollment:** The board provides an annual open enrollment period during which an employee may add, cancel, or change coverage. If no action is taken by the employee to change coverage, previous coverages will continue for the next calendar year.

3.4.3.2 Organizational Contribution

The organization contributes toward the cost of certain employee benefits each pay period during the school year in which a paycheck is earned. In any period during which a paycheck is not earned, the employee will owe both the organization contribution amount and the normal insurance deductions. Organizational contribution amounts vary and are determined by the board annually.

3.4.3.3 Termination of Coverage

Insurance coverage ends the last day of the month in which an employee no longer meets eligibility requirements or terminates employment.

3.4.3.4 Leaves of Absence

While on an approved, unpaid leaves of absence, employees are required to pay the entire cost of all insurance plans, including the organization-paid portion in order for coverage to continue. The appropriate person(s), agencies, and/or organizations must receive payment by the first of each month. Insurance coverage will be canceled for nonpayment if full payment is not received by the due date. When an employee is on an approved paid leave, the employee is responsible only for payment of the portion of premium(s) the employee normally pays. Nonpayment of premiums will result in cancellation of coverage.

Suspension Without Pay: While on suspension without pay, an employee is considered to be on unpaid leave of absence. As such, the employee is entitled to maintain insurance coverage by paying the total cost of insurance. If the employee elects to continue insurance and is reinstated, the employee will be refunded the portion that is normally paid by the organization but which the employee paid during the period of suspension. If the employee elects to continue insurance and is not reinstated, the insurance will terminate the last day of the month in which the employee is dismissed. If the employee chooses not to continue insurance and is reinstated, insurance will be reinstated the first of the month following the date of the final order and the employee will be responsible for any regular employee contributions.

3.4.3.5 Worker's Compensation

The organization provides Workers' Compensation benefits pursuant to Florida law.

3.4.4 Miscellaneous

3.4.4.1 Reclassification

Employees who complete a professional teaching certificate such as ESE, Gifted and ESOL endorsements that would support adding a supplemental payment to their compensation are required to provide appropriate documentation to the school operations manager or designee. Such changes to the salary shall only be made at three times during the year: at the start of the fiscal year, at the start of the school year, and at the start of second semester of the school year.

3.4.4.2 Retroactive Payments

When salary and benefit agreements are reached, any approved retroactive payments due employees will be paid only to those in active pay status on the date of board approval.

3.4.4.3 Return of Overpayments

If an employee is overpaid due to an error, resignation, or any other reason, the organization is entitled to recover any overpayment.

3.4.4.4 Payroll Withholdings

The organization shall withhold taxes from each employee's pay according to the law. Every deduction from your paycheck is explained on your check voucher. Employees who do not understand the deductions should ask the school operations manager or designee to explain them.

Employees may change the number of withholding allowances they wish to claim for Federal Income Tax purposes at any time by filling out a new W-4 form and submitting it to the school operations manager or designee. The office maintains a supply of these forms.

All Federal, State, and Social Security taxes will be automatically deducted from paychecks. Federal Withholding Tax deduction is determined by the employee's W-4 form. The W-4 form should be completed upon hire and it is the employee's responsibility to report any changes in filing status to the school operations manager or designee and to fill out a new W-4 form.

3.5 Dual Employment

An employee may provide services regarding a non-school developed curriculum or program or participate in programs sponsored by other agencies when approved in writing by the school operations manager or designee. An employee who chooses to request temporary paid leave when engaged in such activities must remit to the organization any remuneration (honorariums, stipends, consultant service fees, etc.) received. In addition, the employee shall remit any travel expense reimbursement provided by the sponsoring agency to the organization when the organization is liable for travel expenses authorized by the approved request.

An employee may not retain such compensation without utilizing personal leave chargeable to Paid Time Off (PTO), or personal leave without pay. An employee wishing such compensation must request the leave through the submittal and approval of the prescribed forms. The organization will not be

responsible for workers' compensation or liability protection or any benefits for employees on personal leave.

An employee providing consultation concerning a curriculum developed by the organization or an individual school operated by the organization, must remit to the school any remuneration received.

3.6 Substitutes

The organization will utilize only qualified substitutes for all employee groups. The school operations manager or designee will develop procedures for reporting absences, assigning substitutes and developing a substitute compensation plan.

Substitute teachers shall meet all legal requirements for substitute teachers. The rate of compensation shall be according to the annual school budget approved by the board of directors. Records shall be kept by the school operations manager concerning number of days taught by substitutes and the amount of funds expended. The board of directors shall be informed about this data at periodic intervals.

Staff members who require substitutes are responsible for making arrangements for substitutes themselves. A list of potential substitutes will be supplied to staff members annually.

3.7 Leaves

3.7.1 Family and Medical Leave (FMLA)

Naples Classical Academy makes available various types of unpaid, job protected leave in accordance with the requirements of the Family and Medical Leave Act of 1993 (FMLA).

3.7.1.1 Eligibility

Employees are eligible for unpaid FMLA leave if they:

1. have a cumulative (not necessarily continuous) 12 months of prior service;
2. have worked at least 1250 hours during the 12 months immediately preceding the date on which the FMLA leave would commence; and,
3. work at a location where at least 50 employees are employed within a 75-mile radius.

3.7.1.2 Basic Leave

For eligible employees, up to 12 weeks of unpaid leave, in a 12-month period, is available for one or more of the following purposes:

- For the birth and care of a newborn child of the employee;
- For the care and/or placement of a child for adoption or foster care;
- To care for a spouse, child, or parent who has a serious health condition; a child, for purposes of this policy, includes an individual who is either (1) under the age of 18 or (2) older than 18 but incapable of self-care because of a physical or mental disability;
- For your own serious health condition.

The 12-month period is measured on a “rolling backward” basis. Leave measured on a rolling backward basis is measured backward from the date any FMLA leave would commence.

3.7.1.3 Qualifying Exigency Leave

For eligible employees, up to 12 weeks of unpaid leave, in a 12-month period, is available for an eligible employee where the employee’s spouse, son, daughter or parent is on “covered active duty” and leave is needed for a “qualifying exigency.” Covered Active Duty includes: (1) in the case of a member of a regular component of the Armed Forces, duty during the deployment of the member with the Armed Forces to a foreign country; and (2) in the case of a member of a reserve component of the Armed Forces, duty during the deployment of the member with the Armed Forces to a foreign country under a call or order to active duty. A “qualifying exigency” is:

- Short notice deployment;
- Military events and related activities;
- Childcare and school activities;
- For the purpose of making financial and legal arrangements;
- Rest and recuperation;
- Post-deployment activities; and/or,
- Additional qualifying activities.

The “rolling backward” method used for measuring “Basic Leave” is also used to measure the 12-month period for “Qualifying Exigency Leave.”

3.7.1.4 Covered Service Member Care Leave

Leave is available for an eligible employee to care for a spouse, child, parent or next-of-kin who:

- is a current member of the Armed Forces or a member of the Armed Forces who is on temporary disability, and who has a “serious injury or illness” for which he or she is undergoing medical treatment, recuperation, or therapy; or, otherwise in outpatient status; or, otherwise on the temporary disability retired list, or
- is a veteran of the Armed Forces who is undergoing medical treatment, recuperation, or therapy, for a “serious injury or illness” and who was a member of the Armed Forces at any time during the period of 5 years preceding the date on which the veteran undergoes the medical treatment, recuperation, or therapy.

For purposes of this section the following definitions apply:

- the term “Armed Forces” includes Armed Forces, National Guard, and Reserves.
- the term “serious injury or illness” means:
 - For current members of Armed Forces – an injury or illness that was incurred by the member in line of duty on active duty in the Armed Forces (or existed before the beginning of the member’s active duty and was aggravated by service in line of duty on

active duty in the Armed Forces) and that render the member medically unfit to perform the duties of the member's office, grade, rank, or rating.

- For veterans of the Armed Forces – an injury or illness that was incurred by the member in line of duty on active duty on the Armed Forces (or existed before the beginning of the member's active duty and was aggravated by service in line of duty on active duty on the Armed Forces) and that manifested itself before or after the member became a veteran.
- Next-of-kin of a covered service member is the nearest blood relative other than the covered service member's spouse, son, or daughter, unless the covered service member has specifically designated in writing another blood relative as his or her nearest blood relative for purposes of military caregiver leave under the FMLA.

For Covered Service Member Care leave only, an employee is entitled to 26 work weeks of leave during any single 12-month period measured on a "rolling forward" basis. Service member Care leave measured on a rolling forward basis will be measured using the 12-month period forward from the date of the employee's first instance of Service Member Care leave.

3.7.1.5 Intermittent Leave

Eligible employees may take leave intermittently, as blocks of time off or in the form of reducing the employee's normal weekly or daily schedule. If the employee needs leave intermittently or on a reduced-leave schedule for planned medical treatment, it is the employee's obligation to schedule the treatment so as not to unduly disrupt the organization's operations. Further, intermittent leave or leave on a reduced-leave schedule must be medically necessary due to a serious health condition or a serious injury or illness, except in the case of intermittent leave for a Qualifying Exigency. In addition, employees are permitted to take intermittent leave for the birth of a child or placement of a child for adoption or foster care; however, intermittent leave for these reasons is only permitted upon the approval of the school operations manager or designee.

3.7.1.6 Giving Notice of the Need for Leave

Absent extenuating circumstances, an employee must provide the organization with at least 30 days' advance written notice before FMLA leave is to begin. Failure to do so may cause delay or denial of leave.

If the need for leave is unforeseeable, then the employee must provide notice to the organization as soon as practicable under the facts and circumstances of the particular situation. For unforeseen leave, employees must follow the normal procedure for contacting their supervisor to report an absence.

3.7.1.7 Approval

The organization will generally notify an employee within 5 business days of receipt of his or her request for FMLA leave of their eligibility to take Family and Medical Leave. If an employee is not eligible, the organization will tell him or her why.

3.7.1.8 Providing Evidence of Need for Leave

In most cases, the organization will request that the employee provide additional information regarding certification of the leave by providing the employee with a certification form, specific to the type of leave the employee is requesting, to be completed and returned to the school operations manager or designee. Certification forms and any other requested documentation must be returned to the school operations manager or designee within fifteen (15) days of the organization request for Certification (absent extenuating circumstances).

3.7.1.9 Designation of Leave

Within five (5) business days after the employee has submitted the appropriate Certification form and/or the organization has sufficient information to determine whether the leave requested is FMLA covered, the school operations manager will complete and provide the employee with a written response to the employee's request for FMLA leave.

3.7.1.10 Intent to Return to Work from FMLA Leave

Consistent with the manner in which the organization addresses other types of medical and personal leave, the organization may require an employee on FMLA leave to report periodically on the employee's status and intent to return to work.

3.7.1.11 Pay During Leave

If the employee has available Paid Time Off (PTO), the organization requires the employee to use the remaining PTO at the start of FMLA leave. Once PTO is exhausted, the employee will go on unpaid leave. Both paid and unpaid leave count towards the 12 or 26-week (in the case of Covered Service Member Care Leave) limit.

3.7.1.12 Benefits During Leave

Health insurance benefits will be maintained during leave; however, the employee must continue to pay his or her share of any premiums. If the employee falls more than thirty (30) days behind in making payments, the coverage may be canceled. In addition, should the employee fail to return to work at the expiration of the approved leave, under certain conditions, the organization is entitled to recover any premiums it paid on the employee's behalf. All insurances and retirement deposits other than health insurance shall be the employee's responsibility.

3.7.1.13 Return from Leave

Upon the employee's release to return to work, the employee will be restored to the same or equivalent position, unless the employee would not otherwise have been employed at the time of reinstatement (e.g., due to an intervening reduction in force or discharge for misconduct or poor performance). The organization reserves the right not to rehire a "key" employee if rehire would cause substantial economic harm to the organization's operation. For the purpose of this policy, key employees are generally those in the top 10 percent of compensation.

3.7.1.14 Return from Leave

Fitness-For-Duty Certification: Any employee who takes leave for the employee's own serious health condition will be required, as a condition of restoration, to obtain and provide certification that the employee is able to resume work and is able to perform the essential functions of his or her job. The cost of the Fitness-for-Duty Certification is paid by the employee. The organization may delay or deny

restoration to employment if a Fitness-for-Duty Certification is not provided. The organization will request a Fitness-for-Duty Certification for leave taken on an intermittent or reduced-leave schedule basis, if reasonable safety concerns exist regarding the employee's ability to perform his or her duties based on the serious health condition for which the employee took leave.

3.7.1.15 Taking More than the Allowed Leave

The organization is unable to keep jobs open indefinitely. If an employee fails to return to work at the end of an approved leave of absence, including any extension of the leave, the employee will be considered to have voluntarily terminated employment.

3.7.1.16 Employee Rights and Responsibilities

The Department of Labor has prepared a summary of an Employee's Rights and Responsibilities under the FMLA. This summary is available to any employee upon request to the school operations manager or by visiting <http://www.dol.gov/whd/regs/compliance/posters/fmlaen.pdf>.

3.7.2 Military

If employees enter military service while working for the organization, they will not lose their status as a regular employee. They will be given an unpaid leave of absence for the duration of the initial tour of duty, and their time in the service will count toward their length of service with the organization. If they are members of a reserve component of the armed forces, they will be granted unpaid leaves necessary to fulfill the requirements of this affiliation. They may use vacation time instead of leave time for this purpose if they prefer, but are not required to do so.

If they apply for reemployment within the time specified by federal law following an honorable discharge from the service, they will be given employment comparable to the position previously held.

3.7.3 Personal Leave of Absence without Pay

Should a situation arise that temporarily prevents an employee from working, he/she may be eligible for a personal leave of absence without pay not to exceed 12 continuous weeks. However, employees must be employed for at least 12 months prior to the requested leave. Any request for a leave of absence without pay must be submitted in writing as far in advance as possible and will be reviewed on a case-by-case basis by the school operations manager or designee. The decision to approve or disapprove is based on the educational requirements of the students, the business and operational needs of the school; the length of time requested; the employee's job performance, attendance, and punctuality record; the reasons for the leave; the effect the employee's absence will have on the work in the department; and the expectation that the employee will return to work when the leave expires. Leaves of absence will be considered only after all PTO leave has been exhausted.

Any planned salary increase for an employee returning from an unpaid leave of absence without pay will be deferred by the length of the leave.

Due to the nature of the organization, the organization cannot guarantee either that an employee's job will remain available or that a comparable position will exist when return from an unpaid leave is sought. When an employee is ready to return from a leave of absence without pay, the organization will attempt to reinstate the employee to his/her former position or to one with similar responsibilities. If the position or a similar position is not available, the organization will search for a suitable position for 30

days from the date the unpaid leave was to officially end. The employee will not be paid for this time. If the employee has not been placed by the end of this period, he/she will be administratively terminated.

An employee who returns to work following an unpaid leave will be considered as having continuous service. If an employee does not return from an unpaid leave of absence without pay, the termination date is the last day of the authorized leave period or the date the employee notifies the school operations manager that he or she is not returning, whichever is earlier. Employees who have been administratively terminated pursuant to this paragraph may be considered for reemployment.

3.7.4 Jury Duty

If an employee is called for jury duty during a period s/he is regularly scheduled to work, the employee is not required to use PTO to cover the absence. When an employee is not impaneled for actual service and only on call, s/he shall report back to work unless authorized by the supervisor to be absent from the work assignment.

3.7.5 Bereavement

When a death occurs in a regular full-time employee's immediate family, that employee may take up to three (3) days off with pay to attend the funeral or make funeral arrangements. The pay for time off will be prorated for a part-time employee if the funeral occurs on a scheduled work day. The organization reserves the right to require verification of the need for the leave. For the purposes of this policy, immediate family is defined as employee's spouse, parents, stepparents, siblings, children, stepchildren, grandparent, father-in-law, mother-in-law, sister-in-law, brother-in-law, son-in-law, daughter-in-law, or grandchild. Should additional time off be needed, the employee may make arrangements with the school operations manager or designee for additional PTO or unpaid days off.

3.8 Employee Behavior

3.8.1 Hours of Duty

The work day starts at 7:30 A.M. and ends at 4:00 P.M. Thirty (30) minutes are provided for staff lunch.

3.8.2 Professional Conduct

Employees shall not use the classroom, nor any other part of school facilities, as a platform for making disparaging remarks against students, parents, teachers or administrators. Conduct contrary to this policy may constitute grounds for disciplinary action up to and including dismissal.

3.8.2.1 Ethical Standards

All employees are required to comply with FLDOE Rule 6A-10.081, Principles of Professional Conduct for the Educational Profession in Florida.

3.8.2.2 Reporting Requirements

It is the duty of all employees to promptly report to the principal, school operations manager or designee, or the board chairperson any alleged misconduct by any employee that affects the health, safety or welfare of a student. Failure of an employee to report such misconduct shall result in disciplinary action. The report may be made verbally; however, the principal, school operations manager or designee, or board chairperson may request a written explanation, which the employee shall be required to provide.

Failure to provide written is considered a retraction of the allegations.

3.8.2.3 Investigation

The principal or school operations manager or designee shall investigate any allegation of misconduct by an employee that affects the health, safety or welfare of a student. In the event that the allegation is made against the principal or school operations manager, the board chairperson may contact the authorizing school district to assist with investigating the situation.

Upon receiving a complaint of misconduct, a prompt preliminary investigation will be undertaken to determine if a reasonable basis exists. If the allegation warrants further investigation, the employee who is alleged to have committed such misconduct shall be reassigned to a position not requiring direct contact with students, or shall be placed on administrative leave with pay pending the outcome of the investigation.

Information related to the alleged misconduct shall be confidential during the investigation.

3.8.2.4 Legally Sufficient Complaint

The principal, school operations manager or designee, or board chairperson shall file any legally sufficient complaint with the Department of Education within thirty (30) days after the date the school became aware of the subject matter of the complaint. A complaint is considered to be legally sufficient if it contains ultimate facts that show that an instructional or administrative employee has committed a violation as provided in 1012.795, F.S., and defined by State Board of Education rule.

3.8.2.5 Resignation or Retirement in Lieu of Termination

The organization, or any of its employees, shall not enter into a confidentiality agreement regarding terminated or dismissed personnel or administrators, or personnel or administrators who resign in lieu of termination, based in whole or in part on misconduct that affects the health, safety, or welfare of a student, and may not provide employment references or discuss the employee's performance with prospective employers in another educational setting, without disclosing that employee's misconduct.

3.8.2.6 Training

All employees shall be offered the opportunity to go through training on the Code of Ethics and Principles of Professional Conduct. Annually employees will be reminded of the reporting requirements of this policy, and participate in a refresher discussion regarding the Code of Ethics and Principles of Professional Conduct.

3.8.2.7 Confidentiality

Employees, volunteers, and board members are bound by ethical and legal codes to protect the confidentiality and privacy of our students and their families and to protect and maintain the confidentiality of all information related to them. Confidential communications include conversations, grades, progress, reports, forms, correspondence, and computer-generated communications with, about or involving in any way any students or their families.

3.8.3 Professional Standards

Employees are expected to observe certain standards of job performance and good conduct. When

performance or conduct do not meet organizational standards, the school will endeavor when it deems appropriate to provide the employee a reasonable opportunity to correct the deficiency. If, however, the employee fails to make the correction, he or she will be subject to discipline, up to and including termination.

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

3.8.3.1 Job Performance

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

- Below-average work quality or quantity;
- Poor attitude (for example, rudeness or lack of cooperation);
- Excessive absenteeism, tardiness, or abuse of break and lunch privileges;
- Failure to follow instructions or school procedures; or
- Failure to follow established safety regulations.

3.8.3.2 Misconduct

Employees may be disciplined for misconduct, including but not limited to the following:

- Insubordination;
- Dishonesty;
- Theft;
- Discourtesy;
- Misusing or destroying the organization's property or the property of another on the organization's premises;
- Violating conflict of interest rules;
- Disclosing or using confidential or proprietary information without authorization;
- Falsifying or altering the organization's records, including the application for employment;
- Interfering with the work performance of others;
- Altercations;
- Harassing, including sexually harassing, employees, students or parents;
- Being under the influence of, manufacturing, dispensing, distributing, using, or possessing alcohol or illegal or controlled substances on organization property or while conducting school business;
- Gambling on school premises or while conducting organization business;
- Sleeping on the job or leaving the job without authorization;
- Possessing a firearm or other dangerous weapon on organization property or while conducting organization business; [or]
- Being convicted of a crime that indicates unfitness for the job or raises a threat to the safety or

well-being of the organization, its employees, students, parents or property; or

- Refusing to submit to testing for drugs and/or alcohol.

3.8.3.3 Attendance

In addition to the general rules stated above, employees may be disciplined for failing to observe the following specific requirements relating to attendance:

- Reporting to work on time, observing the time limits for rest and lunch periods, and obtaining approval to leave work early; and
- Notifying the principal or school operations manager or designee in advance of anticipated tardiness or absence.

3.8.4 Discipline Procedure

Except as set forth elsewhere in the organization's policies, discharge for poor performance ordinarily will be preceded by a verbal warning and a written warning.

The organization reserves the right to proceed directly to a written warning for either misconduct or performance deficiency, or to terminate for misconduct without resort to prior disciplinary steps, when the organization deems such action appropriate.

3.8.4.1 Suspension and/or Dismissal of Instructional and Administrative Support Personnel During Contract Period

Suspension of instructional and administrative personnel during the contractual period shall be by the principal, school operations manager, or designee. Whether such suspension will be with or without pay will be at the discretion of the principal, school operations manager, or designee, who shall promptly notify each employee in writing who has been suspended or dismissed and set forth the basis for suspension or dismissal.

3.8.5 Employment at Will

Nothing in this Guideline is intended to alter the at-will status of employment with the organization.

3.8.6 Conflicts of Interest

No employee or directors of the organization shall solicit students, employees, or the organization for the selling of goods and services, other than as part of a school activity.

No employee shall accept any gift, favor, or service of value from companies or organizations that now are engaged in, or are being considered for, doing business with the organization.

Expenses for trips to evaluate products or equipment shall be paid by the organization if previously approved by the school operations manager or designee. However, once equipment is purchased or leased, personnel may attend training sessions at the expense of the organization if training is included as a service within the purchase or lease price, and is approved by the school operations manager or designee.

When a seminar, training, or educational meeting or session is provided by an industry representing

more than one company and offered at no cost, or at reduced or partial costs, to staff, and the resulting knowledge or training is judged by the school operations manager (or designees) to be in the organization's interest with no advantage or obligation given to an individual company, and to be no conflict of interest, the school operations manager (or designee) may authorize attendance.

No employee shall accept other employment which might impair the employee's independence of judgment in the performance of duties for the organization. All outside employment must be disclosed to and approved by the principal or designee in writing.

Violation of this policy may constitute grounds for dismissal from employment.

3.8.7 Financial Obligations

Employees are expected to handle their personal financial obligations in such manner as to prevent the involvement of the organization.

3.8.8 Political Activities

Employees are not allowed to engage in activities supporting or denouncing individual political candidates or views while conducting activities for the organization. The use of organizational resources for political activities is strictly prohibited. Should an employee choose to campaign for and hold an elective public office, the school operations manager will ensure proper safeguards are put into place to ensure that the campaign or elected duties do not interfere with the position and responsibilities the employee holds at the organization.

3.8.9 Academic Freedom

As a classical charter school, NCA strives to instill in students a thirst for knowledge (truth), a desire to do good, and a love of the beautiful as we develop strong moral character in them. Therefore, teachers, leaders, and staff are expected to evaluate and use materials and topics with prudence and virtue. It is the rightful duty of a qualified teacher to encourage within students a never-ending search for truth in its many forms. Such a search may inevitably lead to areas of controversy. It is the belief of the organization that discussion of such issues, dealing with local, state, national and international affairs, shall be encouraged. Free, logical, and intelligent dialogue within the classroom is a necessity in the search for truth. Such freedom of expression should be viewed, not simply as a constitutional guarantee, but as a fundamental necessity for the successful practice of scholarship in a free society. All sides of such controversial issues shall be presented where reasonable and feasible in the judgment of the teacher and the principal.

It is recognized that the application of this principle in a K-12 program differs somewhat from its application at higher educational levels. Teachers shall consider the relative level of maturity of their students and their need for guidance in the study of such issues to arrive at objective and balanced views.

Teacher use of potentially controversial materials: It is the responsibility of the teacher (or other instructional staff member) who intends to use materials that may be considered offensive to reasonable persons within the community, to notify the principal of the potentially controversial materials. It is the principal's responsibility to ensure that the materials used are at grade level or below, and appropriate and consistent with the Florida Standards, and consistent with the mission, vision, and ideals of the school. If the materials are potentially controversial, a notice will be sent home to the parents giving

them the opportunity to allow their student to do an alternative project.

3.8.10 Reporting Legal Infractions

All employees are required to promptly notify the school operations manager if they are arrested or given a Notice to Appear for any criminal offense, including driving under the influence (DUI) and other criminal traffic offenses and local ordinance violations punishable by any period of incarceration, or charged in any way with such offenses. In the event that the employee in question is the school operations manager, he or she shall report said legal infraction(s) to the chairman of the board. Once a report has been made, the supervisor shall determine whether this offense could make the employee ineligible for employment under § 1012.315, F.S., and take such actions as are deemed necessary.

3.8.11 Whistleblower Policy

The organization requires its directors, officers, employees, and volunteers to observe high standards of ethics in the conduct of their duties and responsibilities within the organization. As representatives of the organization, such individuals must practice honesty and integrity in fulfilling their responsibilities and must comply with all applicable laws and regulations. The purpose of this policy is to create an ethical and open work environment, to ensure that the organization has a governance and accountability structure that supports its mission, and to encourage and enable directors, officers, employees, and volunteers of the organization to raise serious concerns about the occurrence of illegal or unethical actions within the organization before turning to outside parties for resolution.

All directors, officers, employees, and volunteers of the organization have a responsibility to report any action or suspected action taken within the organization that is illegal, unethical, or violates any adopted policy of the organization. Anyone reporting a violation must act in good faith, without malice to the organization or any individual within the organization and have reasonable grounds for believing that the information shared in the report indicates that a violation has occurred. A person who makes a report does not have to prove that a violation has occurred. However, any report which the reporter has made maliciously has good reason to believe is false will be viewed as a serious disciplinary offense. No one who in good faith reports a violation, or who, in good faith, cooperates in the investigation of a violation shall suffer harassment, retaliation, or adverse employment action.

3.8.12 Occupational Safety

The organization is committed to the safety of its employees, vendors, contractors and the public and to providing a clear safety goal for management.

The prevention of accidents is the responsibility of every employee. It is also the duty of all employees to accept and promote the established safety regulations and procedures. Every effort will be made to provide adequate safety training. If an employee is ever in doubt about how to perform a job or task safely, assistance should be requested. Unsafe conditions must be reported immediately.

It is the policy of the organization that accident prevention shall be considered of primary importance in all phases of operation and administration. The organization's administration is required to provide safe and healthy working conditions for all employees and to establish and require the use of safe practices at all times.

Failure to comply with or enforce the organization's safety and health rules, practices and procedures could result in disciplinary action up to and including termination.

3.8.12.1 Accident/Incident Reporting

It is the duty of every employee to immediately, or as soon as is practical, report any accident or injury occurring during work or on the organization's premises so that arrangements can be made for medical or first-aid treatment, as well as for investigation and follow-up purposes.

3.9 School Rights

3.9.1 Employment of Relatives

No prospective employee shall be hired in which a close relative holds an administrative or supervisory position that directs an employee directly or indirectly.

No prospective employee shall be hired without disclosure of a close relative holding any position within the school or as a member of the board of directors.

If a close relative is employed by the organization, both parties shall agree in writing to maintain professional conduct while on duty or at school related activities.

If the close relative is a member of the board of directors, the board member shall abstain from any motions that directly involve employment matters or financial gain for the specific relative employee.

Close relative shall be defined as the first degree of kindred: husband, wife, father, mother, brother, sister, son, daughter, and in-laws of the same degree.

3.9.2 Pre-Work Physical Examinations

Pre-work physical examinations are required of some employees, as mandated by Florida Law, and as prescribed by these policies.

3.9.3 Initial Appointment

Except as otherwise provided for in Florida Statute, applicants for teaching positions must be eligible for a Florida Certificate and qualified for the positions for which they are recommended.

Appointments shall be made only by the principal. The organization may offer contracts to outstanding applicants as early as November in anticipation of openings for the following school year. Priority shall be given to the employment of elementary teachers who are competent to teach reading and/or mathematics skills and concepts. Teachers who profess such competencies but do not or cannot demonstrate them, whether deliberately or not, may be terminated at the discretion of the principal. The organization may require teachers to participate in staff training and development activities in reading, language arts, mathematics, science and social studies. Such training shall be given outside regular school hours at no cost to the teacher.

An adjunct instructor may be employed on an annual, daily, or part-time hourly basis, and shall not be eligible for a professional services contract.

Employment decisions for teaching positions shall be made by the principal, subject to guidelines and requirements set forth by the board of directors and to the annual budget.

3.9.3.1 Background Screening

Prior to employment, candidates must be screened by the organization using the Department of Education's electronic screening tools. The school shall also check each reference from the prospective employee's previous employers and character references when provided and reasonably feasible. All employment candidates who pass the screening shall undergo a level 2 background check with the school district to ensure they are eligible for employment under § 1012.315, F.S.

3.9.3.2 Initial Probationary Period

Employees shall be subject to an initial probationary period of ninety (90) calendar days. Should the employee be discharged for unsatisfactory performance during such initial probationary period, as provided in Section 443.131, Florida Statutes, the School will not be liable for any unemployment compensation benefits.

3.9.4 Employee Evaluations

3.9.4.1 Intent

It is the intent of the organization that assessments of personnel be used for two reasons: 1) Determining the suitability for retention of the continuing professional service of contract personnel; and 2) Assisting staff in their professional development to best impact the education of students and operation of the school. The organization acknowledges and agrees to follow all legal requirements as set forth in Florida Statute as they apply to charter schools.

3.9.4.2 Observations

Teachers will have at least two formal observations during each academic year by the individual's supervisor. The supervisor will share with the teacher the evaluation criteria and expectations prior to conducting an observation. The supervisor will either provide a written summary or a personal conference to discuss the results the observation within two weeks after the observation.

3.9.4.2.1 Foundations

Teacher evaluations and observations shall be based on the Florida Educator Accomplished Practices, or the Florida Leadership Standards for administrative staff members. These standards are defined in Florida Administrative Codes.

3.9.4.3 Student Performance Data

Professional staff members shall have a portion of their annual evaluation based upon student performance indicators, as required by Florida law. If the student performance data is not available prior to the due date of the annual evaluations, the evaluations may be amended to incorporate the data once it becomes available.

3.9.4.4 Annual Evaluation

Each staff member will receive a written annual evaluation each year, and the evaluation shall be presented to the employee by May 15 of each year.

3.9.4.4.1 Individual Writing Evaluation

Each employee shall be notified at the start of each year who their immediate supervisor is who will be writing their annual evaluation. Teachers and support staff will be supervised by an administrative member of the staff. The principal and school operations manager or designee will be evaluated by the board of directors.

3.9.4.4.2 Categories

The organization shall use the following indicators of teacher performance as the result of the annual evaluation: Highly Effective, Effective, Needs Improvement or Unsatisfactory. For teachers in their first three years of employment, the Needs Improvement rating shall be replaced by Developing.

3.9.4.4.3 Miscellaneous

Following the completion of the evaluation, the supervisor shall meet with the employee to discuss the evaluation. Employees may provide a written response to the evaluation as a permanent attachment to the evaluation. Employees will be expected to sign the evaluation; however, the signature does not necessarily indicate consent with the findings, only that the employee has received a copy of the evaluation. If the employee refuses to sign the document, the supervisor shall provide a written amendment documenting the date the evaluation was discussed with the employee and that the employee refused to sign the document acknowledging its receipt.

3.9.4.4.4 Unsatisfactory Evaluations

If an employee has received an unsatisfactory performance assessment or concerns develop throughout the year such as following a formal observation, the supervisor shall confer with the employee and shall make specific recommendations for actions the supervisor believes should result in improvement. The supervisor and employee shall develop a plan, which will be shared with the principal and school operations manager or designee of the organization. The plan shall include a prescribed period of time in which the corrective actions must be completed. If the employee has received an unsatisfactory evaluation, the employee shall be placed on a 90-day probationary period in which the employee shall receive assistance and training to correct the deficiencies noted in the evaluation.

3.10 Employee Rights and Responsibilities

3.10.1 Professional Education

The organization and the school district conduct various types of professional development opportunities which shall serve to increase the efficiency of all staff members, instructional, administrative and supportive. Staff members are expected to participate in such professional education activities. Days and times designated as professional education or training must be used as such unless the principal or school operations manager or designee agrees to another use of the time in writing.

3.10.2 Copyrights and Patents

In those instances in which a product is clearly outside the job description of an employee, the results of those employee's work are the employee's private property. Organization employees have the

privilege to do research, write articles, pamphlets and books, and to present papers before learned societies, to enter into contracts for the publication of their works, to procure copyrights and patents for their products, and to receive royalties that may accrue to them as a result of the sale of such works. Such work may not interfere with the performance of the employee's regular or assigned duties.

When such a product is connected with the employee's work assignment, and the employee desires to obtain a copyright or patent, a written outline of the project and a statement of the employee's intent to acquire a copyright or patent shall be presented to the school operations manager or designee who shall have sixty (60) days to determine whether the school shall have an interest in such a product. If, at the end of such a sixty (60) day period, the employee has received no such statement from the school operations manager or designee, the employee shall be free to consider such a product as personal property. In the event the school operations manager or designee informs the employee that the organization has an interest in such product, the employee and the organization may enter into whatever contractual agreement(s) may be in their mutual interests.

3.10.3 Reproduction of Copyrighted Materials

Organization employees are expected to be familiar with and adhere to the provisions of the copyright laws currently in force under Title XVII of the United States Code. Any reproduction of copyrighted materials shall be done either with permission of the copyright holder or within the bounds of the "fair use" doctrine of the copyright law; otherwise, the individual employee responsible for reproduction may be liable for breach of copyright under existing laws.

3.10.4 Transporting Students

Unless an employee is transporting a student at the direction of the principal, school operations manager, or designee during an emergency, or during an officially approved trip in accordance with organization procedures, such transportation shall be furnished at the employee's own risk or liability. The organization does not expect employees to transport students except when such transportation is provided during an emergency or an officially approved trip. An employee who provides such transportation except for an emergency or during an officially approved trip shall be acting outside the scope of that employee's employment.

Each employee must provide a copy of a valid driver's license and proof of insurance to the organization prior to transporting any student for any reason.

3.10.5 Smoking of Tobacco Products on School Property

The purpose of this policy is to comply with the "Florida Clean Indoor Air Act" in protecting the public health, comfort and environment by creating areas in all school facilities that are free from tobacco smoke. No person may be in possession of a lighted cigarette, lighted pipe, lighted cigar, or any other lighted tobacco product, in any school facility, including the outside grounds, or within 100 feet of any building or area used by the organization. No areas for smoking shall be designated on the organization's property, or within 100 feet of any building or area used by the organization. Students and staff members found in possession of tobacco products will face disciplinary actions as described within this policy manual. Other adults found in possession may be restricted from access to organizational property based on the circumstances of the incident.

3.10.6 Drug-Free and Alcohol-Free Workplace

This policy is derived from, and complies with, the Drug-Free Workplace Act of 1988. Additionally, the purpose of this policy is to comply with the Federal Highway Administration (FHWA) regulations for the establishment and implementation of anti-drug programs in the motor carrier industry as set forth in Title 49 of the Code of Federal Regulations (CFR) Parts 391 “Qualifications of Drivers” and 394 (Notification and Reporting of Accidents.” These parts of the CFR include, by reference, the requirements of 49 CFR Part 40 “Procedures for Transportation Workplace Drug Testing Programs” which apply to all Department of Transportation regulated industries and set forth the procedural requirements for testing, from urine sample collection through analysis and verification of test results.

3.10.6.1 Prohibition

Employees are prohibited from engaging in the unlawful manufacture, distribution, dispensing, possession, being under the influence of, or use of alcohol and/or a controlled substance (as defined in Chapter 893 of the Florida Statutes): in the workplace; or during the workday; or when on duty; or in the presence of students or students’ families as part of any work-related activities. Violation of this prohibition shall result in appropriate disciplinary action up to and including termination and referral for prosecution.

3.10.6.2 Drug-Free and Alcohol-Free Workplace

A drug-free and alcohol-free workplace shall be maintained. Each employee shall be given a copy of this policy as part of this Policy Manual. Additionally, each employee shall be notified that, as a condition of employment, the employee will abide by the terms of this policy and notify the employer of any criminal drug and/or alcohol statute conviction for a violation occurring in the workplace no later than five days after such conviction. The employer will initiate certification/revocation proceedings pursuant to Section 1012.795 F.S. for certificated employees convicted of criminal charges. Within thirty (30) days of notification, appropriate personnel action against such an employee shall be taken, up to and including termination. Employees can also be required to participate satisfactorily in a drug and/or alcohol abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency.

3.10.6.3 Drug and Alcohol Testing

The organization retains the right to perform testing for Drugs and Alcohol at the following times:

- **Pre-employment testing:** All individuals whom the organization intends to hire on a permanent or temporary basis may be tested at the discretion of the organization.
- **Reasonable Suspicion Testing:** When a covered employee’s conduct or appearance is directly observed as indicative of being under the influence of a drug or alcohol during on-duty time.
- **Post-Accident Testing:** As soon as practicable following an accident, a driver (unless deceased) shall be tested for alcohol and controlled substances when any person involved in the accident has been fatally injured or the covered employee received a citation for a moving traffic violation arising from the accident. Testing will be conducted not later than thirty-two (32) hours after the accident for drugs and not later than eight (8) hours after the accident for alcohol. For the purpose of this rule an accident is defined as an incident involving a motor vehicle in which there is either a fatality, an injury treated away from the scene, or a vehicle is required to be towed

from the scene.

- **Follow-Up Testing:** As part of or as a follow-up to counseling or rehabilitation, the covered employee is subject to unannounced follow-up drug or alcohol testing. The covered employee shall be subject to a minimum of six (6) follow-up drug or alcohol tests in the first twelve (12) months.
- **Random Testing:** Random testing can be performed at any point in time at the discretion of the school operations manager or designee.
- **Return to Duty Testing:** Before a covered employee returns to duty requiring the performance of a safety-sensitive function after engaging in prohibited conduct, the covered employee shall undergo a return-to-duty test. In the event a return-to-duty test is required, a substance abuse professional (SAP) must also evaluate the covered employee and the employee must participate in any assistance program prescribed.

3.10.6.4 Testable Substances

Individuals shall be tested for the following drugs: marijuana, cocaine, opiates, amphetamines, phencyclidine (PCP), alcohol, and all other illegal or controlled substances. Covered employees who engage in prohibited drug and/or alcohol related conduct must be immediately removed from duties. Such removal shall be affected for the following, in addition to other actions deemed dangerous or improper by the school operations manager or designee.

- a. Using alcohol while performing safety-sensitive functions.
- b. When required to take a post-accident alcohol test, using alcohol within eight (8) hours following the accident or prior to undergoing a post-accident alcohol test, whichever comes first.
- c. Refusing to submit to a drug or alcohol test required by post-accident, reasonable suspicion or follow-up test requirements.
- d. Reporting for duty or remaining on duty, requiring the performance of safety-sensitive functions, when the covered employee uses any drug, except when instructed by a physician who has advised the covered employee that the drug does not adversely affect the covered employee's ability to safely operate a motor vehicle.
- e. Reporting for duty, remaining on duty or performing a safety-sensitive function, if the covered employee tests positive for drugs.

3.10.6.5 Disciplinary Consequences if Positive Results

Disciplinary action up to and including termination may be instituted against covered employees who have violated the standards of conduct cited in this policy. Nothing will preclude the organization from seeking prosecution for violation of this policy where the board deems appropriate. An employee who receives a positive drug test result or an alcohol test result (.04 or greater concentration) from a required test during on-duty time will be immediately suspended without pay and recommended for dismissal.

An employee who refuses to submit to a required alcohol or controlled substances test will be immediately suspended and recommended for dismissal. Refusal to submit to an alcohol or controlled substances test is defined as: (1) failing to provide adequate breath for testing without a valid medical explanation after the employee has received notice of the requirement for breath testing; (2) failing to provide adequate urine for controlled substances testing without a valid medical explanation after the employee has received notice of the requirement for urine testing; or (3) the employee engaging in conduct that clearly obstructs the testing process. The employee will be provided with the name(s) of a qualified Substance Abuse Professional (2) (SAP) and resources available from which the employee may choose to seek assistance.

An offer of employment will be withdrawn for any individual who receives a positive drug test result or who receives a result showing an alcohol concentration of .02 or greater on a required pre-employment test.

An employee who receives a result showing an alcohol concentration of .02-.039 from a required test shall be removed from performing any safety-sensitive function for a minimum of twenty-four (24) hours. Duty time missed shall be charged to unpaid leave or may be charged to PTO time if available. Disciplinary action will be taken in accordance with these policies.

An employee who receives a result showing an alcohol concentration of .02-.039 from a required post-accident test shall be removed from performing any safety-sensitive function for a minimum of twenty-four (24) hours. Duty time missed shall be charged to unpaid leave or may be charged to PTO time if available. Any covered employee who is cited and found guilty of a violation as a result of involvement in an accident will also receive a letter of reprimand. Disciplinary action for subsequent incidents will be taken in accordance with these policies.

An employee who is convicted of felony driving under the influence (DUI) or any drug related offense will be recommended for dismissal. As used in this policy, conviction is defined as a finding of guilt, a plea of guilt, a plea of Nolo Contendere, or entering a Pre-Trial Intervention (PTI) program, whether or not there is a formal adjudication of guilt.

3.10.6.6 Confidentiality

The laboratory may disclose test results only to the school operations manager or designee. Any positive results which the organization justifies by acceptable and appropriate medical or scientific documentation to account for the result as other than the intentional ingestion of an illegal drug will be treated as a negative test result and may not be released for the purpose of identifying illegal drug use. Test results will be protected under the provision of the Privacy Act, U.S.C. Section 552 a et seq., and Section 503(e) of the Act, and may not be released in violation of either Act. The school may maintain only those records necessary for compliance with this order. Any records of the organization, including drug test results, may be released to any management official for purposes of auditing the activities the organization, except that the disclosure of the results of any audit may not include personal identifying information on an employee.

The results of a drug test of an employee may not be disclosed without the prior consent of such employee, unless the disclosure would be:

- a. To the school operations manager or designee, who has authority to take adverse personnel

action against such employee; to any supervisory or management official within the organization having authority to take adverse personnel action against such employee.

- b. Pursuant to the order of a court of competent jurisdiction or where required by the organization to defend against any challenge against any adverse personnel action.

Any covered employee who is the subject of a drug or alcohol test shall, upon written request, have access to any records relating to the employee's drug test, the results of any relevant certification, review or revocation of certification proceedings as referred to in appropriate statute. Except as authorized by law, an applicant who is the subject of pre-employment drug testing, however, shall not be entitled to this information.

All drug testing information specifically relating to individuals is confidential and should be treated as such by anyone authorized to review or compile program records. In order to efficiently implement this order and to make information readily retrievable, the school operations manager or designee shall maintain all records relating to reasonable suspicion testing, suspicion of tampering with evidence, and any other authorized documentation necessary to implement this order. Such shall remain confidential and maintained in a secure location with limited access. Only authorized individuals who have a "need to know" shall have access to them.

3.10.7 Teacher Certification Standards

3.10.7.1 Applicable Standards

In the absence of Florida Statutes or State Board of Education Rules mandating teacher certification requirements, the school operations manager or designee is directed to establish and keep in force procedures for appropriate certification guidelines. The provision of the Standards shall apply to all teaching certificates issued for grades K-12. When state-mandated certificates are available, all such certificates issued by the organization shall become null and void.

3.10.7.2 Certification Renewals

Professional staff members are required to maintain their state educator certification in accordance with Florida regulations. Staff members are responsible for the completion and submission of all applicable forms and fees for the certification renewals. Once professional staff members have renewed their certifications, they must provide a copy of the certification to their supervisor.

3.10.8 Familiarity with Statutes, Rules and Policies

All instructional personnel are expected to be familiar with Florida Statutes, State Board of Education Rules, and Policies of the School which have particular reference to their responsibilities as educators. When in doubt about the existence or applicability of any such statute, rule or policy, personnel should check with the school operations manager or designee. Copies of Florida Statutes and State Board of Education Rules can be obtained from county law libraries, courthouses in Collier County, and the Internet.

3.10.9 Tutoring

No teacher shall receive compensation for tutoring a student who is enrolled in the teacher's class during

the regular school term. No tutoring by teachers for compensation is allowed on the organization's property. Tutoring is defined as reviewing curriculum that is taught within the classroom.

3.10.10 Membership in Organizations

At the discretion and with the approval of the school operations manager or designee, employees may participate in professional, industry/trade, or other related organizations. Unless membership is deemed necessary by the school operations manager or designee, membership and participation are considered voluntary, and any costs related to such activities are the responsibility of the employee.

3.10.11 Professional Development Trade Hours

In an attempt to encourage instructional and administrative staff members to participate in outside professional development activities, the school agrees to offer Professional Development Trade Hours [PDTH] to employees. Periodically throughout the year professional development days/hours are scheduled, and staff members may utilize accumulated PDTH so that they may not report to work on some professional development days, or be allowed to leave early on early release days in order to partake in these professional development opportunities. If a staff member wants to participate in a professional development activity outside of their normal work hours, and count the training as a PDTH, the employee will ask the principal for permission to attend the training as PDTH. The principal has the discretion to allow or disallow the training to be used as PDTH.

3.10.12 Reappointment or Non-Reappointment of Certified Personnel Not Under Continuing Contract

Teachers with annual contracts will receive notification by May 15 if they are being asked to return the following school year.

3.11 Resignations

3.11.1 Instructional Staff

Instructional employees who for any reason intend to retire or resign at the end of the current school year are encouraged to indicate their plans in writing to the principal as early as possible, but no later than June 1. Letters of resignation shall be submitted to the school operations manager or designee. The letter should state reasons and an effective date for the resignation.

It is the practice of the organization to release individuals who resign for good cause prior to July 1 of each year. After July 1, a certified employee may resign; however, the organization reserves the right to pursue any and all legal options available to it and may require monetary restitution from the employee for any funds the employee may have received for the new fiscal year.

3.11.2 Support Staff

Support staff who wish to resign should address a letter of resignation to the school operations manager or designee. The letter should state reasons and an effective date for the resignation. The organization requests employees provide fourteen (14) days written notice prior to resignation whenever possible.

3.12 Reduction in Force

3.12.1 Instructional Staff

If it becomes necessary to reduce the number of teachers due to a decrease in enrollment, school reorganization, or the financial condition of the School, the organization will act to retain the most qualified teachers best able to serve the needs of the School's students. Seniority will not be the primary consideration for which staff members will be retained.

3.12.2 Support Staff

The organization is authorized to reduce the number of support staff when, in the school operations manager or designee's discretion, factors including, but not limited to, decreases in student enrollment, school reorganization, or financial reasons necessitate such reduction. In making such staff reductions, the organization will seek to retain those staff members best able to serve the needs of school's students.

3.13 Travel and Entertainment Expenses

3.13.1 Prior Approval

The charter school recognizes that employees who travel far from home to represent the charter school's business interests must forego their living accommodations and may forfeit personal time. Accordingly, the charter school will make efforts to provide comfortable and secure accommodations for lodging, meals and travel for employees. However, these items are not intended to be perquisites and the charter school reserves the right to deny reimbursement of expenses that are considered lavish or extravagant. Prior to any travel or entertainment being conducted on the organization's behalf, the employee must first obtain the prior approval of the school operations manager or designee. If the person making the request is the principal or school operations manager permission should be obtained from the board chairperson.

3.13.1 Travel Arrangements

All arrangements required for business travel are to be made by the individual participating in the travel. The school operations manager or designee shall provide a form which will collect all pertinent travel information. For maximum savings on airfares, this form should be completed 30 days in advance unless this is not possible due to the nature of the trip. Unless otherwise agreed to by the school operations manager or designee, all expenses shall be paid by the employee to be reimbursed by the organization afterwards. The organization discourages the use of cash advances to pay for travel expenses. However, should a cash advance be necessary under special circumstances and the school operations manager or designee approves such, all receipts must be submitted for the funds advanced. Any amount not covered by the receipts shall be returned to the school upon the conclusion of the travel. If the funds are not returned, they shall be deducted from the employee's paycheck. Direct billing to the charter school from hotels, restaurants, etc. is not permitted.

3.13.2 Expense Guidelines

3.13.2.1 Air Travel

Make airline reservations based on the following criteria:

- **Expediency:** Getting the employee to their destination in an expedient way. (Direct flights when possible or connecting flights if necessary, for faster flight schedules).
- **Cost:** Employees will fly coach class.
- **Carrier:** An employee's preferred airline can be utilized as long as expediency and cost factors are equal.
- Employees must use regularly scheduled airlines and obtain the lowest (discount) fare available. This may mean that the employee will fly at times that is not always the most convenient for them.

3.13.2.2 Lodging

Employees are expected to use sound business judgment in selecting accommodations. In many cases a corporate rate is available and the employee should request this rate when registering at the hotel. Suite accommodations are not permitted; the organization pays only for single rooms. An upgrade to a security room is a personal expense unless the hotel is in a place or a city that is designated to be a risk to all travelers.

If late arrival is guaranteed and the reservation must be canceled, the cancellation must be made within the time allowed. The organization will not pay for no-shows. All charges shown on the expense report form should be itemized to show hotel charges, meals, telephone charges, etc. In-room movies and use of mini-bars are considered personal expenses and therefore not reimbursable.

The employee will be reimbursed, less any travel advance for bills paid. The original detailed hotel bill must be attached to the expense report. The employee will use the organization's sale tax exemption certificate; Florida sales taxes will not be reimbursed.

Employees will not be reimbursed for overnight travel within fifty (50) miles (one way) of the organization's office or their residence unless the circumstances necessitating the overnight stay is fully explained by the employee and approved by the school operations manager or designee.

3.13.2.3 Meals

For out-of-county travel, employees shall be allowed reimbursement for subsistence. Subsistence allowances for meals shall be paid at the following current rates:

- **BREAKFAST:** When travel begins before 6:00 a.m. and extends beyond 8:00 a.m., the traveler is entitled to an allowance for breakfast of \$3.00.
- **LUNCH:** When travel begins before 12:00 noon and extends beyond 2:00 p.m., the traveler is entitled to an allowance for lunch of \$6.00.
- **DINNER:** When travel begins before 6:00 p.m. and extends beyond 8:00 p.m., the traveler is entitled to an allowance for dinner of \$12.00.

In lieu of receiving subsistence allowances for meals and actual expenses for lodging at the single occupancy rate, employees who are traveling may elect to receive a per diem rate of \$125.00 for overnight travel.

3.13.2.4 Car Rentals

The use of a rental car is permitted ONLY when it is in the interest of the organization to do so. Personal medical insurance should NOT be purchased from the car rental agency since employees are already covered under worker's compensation insurance.

For fewer than three (3) employees traveling together, the charter school will reimburse for the cost of a compact car. Upgrades to midsize are permissible if three (3) or more employees travel together. If rental cars are retained over a weekend, such expenses are personal except when used to travel on a weekend to another location on organizational business.

3.13.2.5 Personal Vehicles

Employees required to use their own automobiles for business will be reimbursed at the prevailing rate per tax guidelines for per-mile deductions. The employee must provide on the expense report, documentation including dates, miles traveled and purpose of each trip. The organization assumes no responsibility for personal automobiles used for business. Further, any parking or speeding violation is the sole responsibility of the employee.

3.13.2.6 Telephone

Business related telephone charges on an itemized lodging receipt and/or telephone charge card should be itemized under telephone expense.

3.13.2.7 Entertainment

In order to be reimbursable, entertainment expenses must be ordinary and necessary expenses directly related or associated with the active conduct of business. It is very important to properly document entertainment expenses and substantiate the following elements:

- The date
- The place (name and location)
- Description or type of entertainment
- The business purpose and the nature of the business benefit expected to be gained by the organization. The business relationship to the organization of the persons entertained (name, occupation, title, etc.).

3.13.2.8 Miscellaneous Expenses

Any additional business expenses that are not categorized above should be listed under miscellaneous expenses and documented with all pertinent information to substantiate the expense.

Unexplained items labeled "miscellaneous" are not allowable items of expense. Some examples of items not considered allowable are: newspapers, magazines, movies, shoe shines, personal expenses incurred for household services due to an employee's absence on a business trip, etc.

3.13.3 Expense Report Preparation and Reimbursement

All business travel and entertainment expenditures incurred by employees are reimbursed through the use of a standard Expense Report attached to the Travel Arrangements form which shall be made available by the school operations manager or designee. Expense reports should be completed and turned in within two weeks of return or incurrence of expenses. Expense report forms must be filled out and totaled completely. Use the appropriate headings and total on a daily basis. Required receipts for items charged must be attached to the report. Any questions regarding completion of the report should be directed to the school operations manager, business manager, or bookkeeper for the organization.

Upon completion, the expense report along with all attachments should be turned into the employee's supervisor for approval. After approval, the expense report is submitted to the bookkeeper or designee for processing and reimbursement. In order to expedite reimbursements, the employee should ensure that the report is completed properly, required documentation is attached, proper authorization has been obtained, and any unusual items are properly explained and documented. Authorized expense reports will be reimbursed by check, normally within two weeks after receipt by the bookkeeper or designee.

3.13.4 Local Travel Reimbursement Report Preparation

All local travel expenditures incurred by employees on behalf of the organization are reimbursable if approved by the employee's supervisor. Employees should complete an Expense Report to request reimbursement for these expenses. Upon completion, the expense report along with all attachments should be turned into the employee's supervisor for approval. After approval, the expense report is submitted to the bookkeeper or designee for processing and reimbursement. In order to expedite reimbursement, the employee should ensure that the report is completed properly, required documentation is attached, proper authorization is obtained, and any unusual items properly explained and documented.

3.14 Staff Teams

The school operations manager and principal shall designate specific teams of staff members to accomplish various tasks throughout the year. The following are required staff teams that will be set each year, and the principal or school operations manager may appoint others on an as needed basis:

3.14.1 School Advisory Team

The School Advisory Team will consist of representatives from various teams of staff members throughout the organization. The School Advisory team will advise the principal and school operations manager as part of a decision-making process to ensure staff input into school operations.

3.14.2 Staff Behavior Team

The Behavior Team will review the school's behavior policy, matrix, and consequences annually and advise the principal and school operations manager on necessary changes to these documents. The Behavior Team shall also serve as an appeal board when a parent wishes to appeal a referral or decision made by administrator, as outlined elsewhere within this policy. The team shall be comprised of at least five members in addition to the principal and school operations manager.

3.14.3 School Based Leadership Team

The School Based Leadership Team shall be a group of experienced educators who come together to

brainstorm research-based interventions to assist specific students and student groups who are struggling. The School Based Leadership Team is further defined in Teaching and Learning section of this policy manual.

3.14.4 Master Schedule Team

The Master Scheduling Team shall annually meet with the principal and school operations manager to provide advice on the development or modification to the school's master schedule.

S. Student Enrollment Application

To enter the enrollment lottery, a parent or guardian creates an account on NCA's SchoolMint website by entering the following to create the account:

- Parent/Guardian First Name
- Parent/Guardian Last Name
- Parent/Guardian Phone
- Parent/Guardian Email

The parent or guardian then completes the remainder of the following form.

Enrollment Application

Student General Information

First Name: _____

Middle Name: _____

Last Name: _____

Current School: _____

Enter "Other" if you don't see your school, or "Not Applicable"

Gender *

Child's Zoned School *

Please select your child's zoned school from the list of Collier County Schools.

Student Residence

Street address, P.O. box, c/o: _____

Apartment, Unit, Suite Number: _____

City: _____

State/Province/Region: _____

ZIP/Postal Code: _____

Siblings

Does the student have a brother or sister currently attending our school? * Yes/No

Sibling Name: _____

Sibling's Date of Birth: _____

Additional Information: _____

Is one of the parents or guardians on the board of this organization? * Yes /No

Board member name: _____

Is one of the parents or guardians employed by this organization? * Yes/No

Employee Name: _____

How did you hear about us ? * : _____

Parent / Guardian Information

Guardian First Name *: _____

Guardian Last Name *: _____

Guardian Mobile Phone Number *: _____

Guardian Email: _____

Guardian Home Phone Number: _____

Guardian Work Phone Number: _____

Guardian Relationship to Student *: _____

T. Evidence of demand for the school, if applicable.

This item is not applicable.

U. Evidence of facility funding sources, if applicable.

The board is seeking financing with well-established lenders in the education facilities sector, such as: SunTrust, BB&T, or various private lenders.

Relationships cannot be further explored or realistically finalized until a charter has been granted by the Sponsor.

V. Draft rental agreement or lease for facility, if applicable.

This item is not applicable.

W. Florida Charter School Revenue Estimating Worksheet

Revenue Estimate Worksheet for Naples Classical Academy					
Based on the 2019-20 FEFP Second Calculation					
School District:		Collier			
1. 2019-20 FEFP State and Local Funding					
Base Student Allocation		\$4,279.49	District Cost Differential:		1.0453
					2019-20
					Base Funding
Program	Number of FTE	Program Cost Factor	Weighted FTE	(WFTE x BSA x DCD)	
(1)	(2)	(3)	(2) x (3)	(4) (5)	
101 Basic K-3	312.00	1.120	349.4400	\$ 1,563,168	
111 Basic K-3 with ESE Services	101.00	1.120	113.1200	\$ 506,025	
102 Basic 4-8	240.00	1.000	240.0000	\$ 1,073,604	
112 Basic 4-8 with ESE Services	78.00	1.000	78.0000	\$ 348,921	
103 Basic 9-12	0.00	1.005	0.0000	\$ -	
113 Basic 9-12 with ESE Services	0.00	1.005	0.0000	\$ -	
254 ESE Level 4 (Grade Level PK-3)		3.637	0.0000	\$ -	
254 ESE Level 4 (Grade Level 4-8)		3.637	0.0000	\$ -	
254 ESE Level 4 (Grade Level 9-12)		3.637	0.0000	\$ -	
255 ESE Level 5 (Grade Level PK-3)		5.587	0.0000	\$ -	
255 ESE Level 5 (Grade Level 4-8)		5.587	0.0000	\$ -	
255 ESE Level 5 (Grade Level 9-12)		5.587	0.0000	\$ -	
130 ESOL (Grade Level PK-3)	16.00	1.181	18.8960	\$ 84,528	
130 ESOL (Grade Level 4-8)	12.00	1.181	14.1720	\$ 63,396	
130 ESOL (Grade Level 9-12)	0.00	1.181	0.0000	\$ -	
300 Career Education (Grades 9-12)		1.005	0.0000	\$ -	
Totals	759.00		813.6280	\$ 3,639,642	
Letters in Parentheses Refer to Notes at Bottom of Worksheet:					
Additional FTE (a)		Number of FTE		2019-20 Base Funding (WFTE x BSA x DCD)	
		<i>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.</i>			
Advanced Placement				\$ -	
International Baccalaureate				\$ -	
Advanced International Certificate				\$ -	
Industry Certified Career Education				\$ -	
Early High School Graduation				\$ -	
Small District ESE Supplement				\$ -	
Total Additional FTE		0.0000	Additional Base Funds		\$ -
Total Funded Weighted FTE		813.6280	Total Base Funding		\$ 3,639,642
2. ESE Guaranteed Allocation:					
	FTE	Grade Level	Matrix Level	Guarantee Per Student	
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.	101.00	PK-3	251	\$ 1,024	\$ 103,424
		PK-3	252	\$ 3,306	\$ -
		PK-3	253	\$ 6,746	\$ -
	78.00	4-8	251	\$ 1,148	\$ 89,544
		4-8	252	\$ 3,430	\$ -
		4-8	253	\$ 6,870	\$ -
	0.00	9-12	251	\$ 817	\$ -
		9-12	252	\$ 3,099	\$ -
		9-12	253	\$ 6,539	\$ -
Total FTE with ESE Services	179.00	Total ESE Guarantee			\$ 192,968

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:	759.00	÷	District's Total UFTE:	47,454.81	
				=	1.5994%	
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:	813.63	÷	District's Total WFTE:	53,139.47	
				=	1.5311%	
4. Supplemental Academic Instruction (UFTE share)	(b)	10,911,174	x	1.5994%	\$	174,513
5. Discretionary Millage Compression Allocation .748 Mills (UFTE share)	(b)	0	x	1.5994%	\$	-
6. Digital Classrooms Allocation (UFTE share)	(b)(d)	281,601	x	1.5994%	\$	4,504
7. Safe Schools Allocation (UFTE share)	(b)	2,549,471	x	1.5994%	\$	40,776
8. Instructional Materials Allocation (UFTE share)	(b)	3,740,533	x	1.5994%	\$	59,826
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)	1,243,088	x	1.5994%	\$	19,882
10. Total Funds Compression Allocation (UFTE share)	(b)	0	x	1.5994%	\$	-
11. Declining Enrollment (WFTE share)	(c)	0	x	1.5311%	\$	-
12. Sparsity Supplement (WFTE share)	(c)	0	x	1.5311%	\$	-
13. Reading Allocation (WFTE share)	(c)	2,273,946	x	1.5311%	\$	34,816
14. Best and Brightest Teacher/Principal Allocation	(f)					
15. Discretionary Local Effort (WFTE share)	(c)	70,308,025	x	1.5311%	\$	1,076,486
16. Proration to Funds Available (WFTE share)	(c)	0	x	1.5311%	\$	-
17. Discretionary Lottery (WFTE share)	(c)	175,185	x	1.5311%	\$	2,682
18. Class Size Reduction Funds:						
	Weighted FTE (not including Add-On)	X	DCD	X	Allocation factors	
PK - 3	481.4560		1.0453		1,314.06 = 661,322	
4-8	332.1720		1.0453		896.32 = 311,220	
9-12	0.0000		1.0453		898.49 = 0	
Total *	813.6280				Total Class Size Reduction Funds	\$ 972,542
(*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			x	399	\$	-
Enter All Adjusted ESE Riders			x	1,418	\$	-
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		\$0.00	\$0.00	\$	-	
Civilians on Federal Lands		\$0.00	\$0.00	\$	-	
Students with Disabilities			\$0.00	\$	-	
Total				\$	-	
21. Florida Teachers Classroom Supply Assistance Program	(i)					
22. Food Service Allocation	(j)					
Total					\$	6,218,637

Proposed Operating Budget

X. Five Year Budget Projections

Naples Classical Academy

			FY21	FY22	FY23	FY24	FY25
		Students	759	870	956	1019	1074
Income Estimates							
Func	Obj	Description	Year 1	Year 2	Year 3	Year 4	Year 5
FEFP Calculations							
	3310	FEFP - 1 -Base Funding	\$ 3,730,633	\$ 4,349,776	\$ 4,856,245	\$ 5,269,696	\$ 5,645,678
	3310	FEFP - 2 -ESE Guaranteed Allocation	\$ 197,792	\$ 233,696	\$ 262,408	\$ 277,871	\$ 291,735
	3310	FEFP - 4 -Supplemental Academic Instruction	\$ 178,876	\$ 210,037	\$ 236,291	\$ 257,726	\$ 277,810
	3310	FEFP - 6 Digital Classrooms Allocation	\$ 4,617	\$ 5,421	\$ 6,098	\$ 6,652	\$ 7,170
	3310	FEFP - 7 Safe Schools Allocation	\$ 41,795	\$ 49,076	\$ 55,211	\$ 60,220	\$ 64,913
	3310	FEFP - 8 Instructional Materials Allocation	\$ 61,322	\$ 72,004	\$ 81,004	\$ 88,352	\$ 95,238
	3310	FEFP - 9. Mental Health Assistance Allocation	\$ 20,379	\$ 23,930	\$ 26,920	\$ 29,362	\$ 31,651
	3310	FEFP -13. Reading Allocation	\$ 35,686	\$ 41,609	\$ 46,455	\$ 50,410	\$ 54,006
	3310	FEFP - 15. Discretionary Local Effort	\$ 1,103,398	\$ 1,286,521	\$ 1,436,344	\$ 1,558,610	\$ 1,669,807
	3492	FEFP - 17. Discretionary Lottery	\$ 2,749	\$ 3,206	\$ 3,579	\$ 3,884	\$ 4,160
	3492	FEFP - 18. Class Size Reduction Funds	\$ 996,856	\$ 1,134,868	\$ 1,233,628	\$ 1,312,564	\$ 1,373,169
	3397	CSCOF - 23. Charter School Capital Outlay Funding	\$ -	\$ -	\$ 513,560	\$ 543,420	\$ 568,400
Total FEFP Income			\$ 6,374,103	\$ 7,410,144	\$ 8,757,744	\$ 9,458,766	\$ 10,083,736
Other Income							
	3440	Gifts, Grants and Bequests	\$ 52,155	\$ 57,150	\$ 61,020	\$ 63,855	\$ 66,330
	3261	School Lunch Reimbursements	\$ 288,722	\$ 330,946	\$ 363,660	\$ 387,625	\$ 408,547
	3262	School Breakfast Reimbursements	\$ 90,201	\$ 103,393	\$ 113,613	\$ 121,100	\$ 127,636
	3451	School Lunch Collections	\$ 72,417	\$ 83,007	\$ 91,213	\$ 97,224	\$ 102,471
	3452	Student Breakfast Collections	\$ 8,039	\$ 9,214	\$ 10,125	\$ 10,792	\$ 11,375
	3473	School-Aged Child Care Fees	\$ 33,813	\$ 38,759	\$ 42,590	\$ 45,396	\$ 47,847
	3495	Other Miscellaneous Local Sources	\$ 19,450	\$ 24,479	\$ 32,228	\$ 42,589	\$ 49,114
	3498	Collection for lost materials	\$ -	\$ 1,794	\$ 1,966	\$ 2,098	\$ 2,214
	3720	Financing / Loan Proceeds	\$ 16,650,000	\$ -	\$ -	\$ -	\$ -
Total Other Income			\$ 17,214,797	\$ 648,742	\$ 716,415	\$ 770,679	\$ 815,534
Total Income			\$ 23,588,900	\$ 8,058,886	\$ 9,474,159	\$ 10,229,445	\$ 10,899,269

Proposed Operating Budget

Naples Classical Academy

			FY21	FY22	FY23	FY24	FY25
Students			759	870	956	1019	1074
Function 5100 - Basic Instruction							
5100	120	Classroom Teacher Salaries	\$ 2,228,520	\$ 2,790,429	\$ 3,073,431	\$ 3,320,165	\$ 3,481,930
5100	140	Substitute Teachers	\$ 56,730	\$ 70,606	\$ 74,474	\$ 78,343	\$ 80,278
5100	150	Paraprofessionals	\$ 144,900	\$ 175,812	\$ 156,724	\$ 162,993	\$ 169,513
5100	160	Other Support Personnel	\$ 35,000	\$ 35,000	\$ 35,000	\$ 39,000	\$ 39,000
5100	210	Retirement	\$ 62,566	\$ 78,249	\$ 85,574	\$ 92,340	\$ 96,815
5100	220	FICA	\$ 188,584	\$ 234,996	\$ 255,482	\$ 275,438	\$ 288,460
5100	230	Group Insurance	\$ 383,823	\$ 460,588	\$ 481,523	\$ 502,459	\$ 509,438
5100	240	Worker's Compensation	\$ 24,652	\$ 30,718	\$ 33,396	\$ 36,005	\$ 37,707
5100	250	Unemployment Compensation	\$ 11,529	\$ 13,797	\$ 14,553	\$ 15,309	\$ 15,687
5100	310	Professional and Technical Services	\$ 10,259	\$ 2,265	\$ 436	\$ 417	\$ 379
5100	330	Field Trips, Sports and Club Expenses	\$ 7,200	\$ 8,729	\$ 9,478	\$ 10,039	\$ 10,614
5100	350	Repairs and Maintenance	\$ 300	\$ 305	\$ 309	\$ 314	\$ 318
5100	360	Annual Software Licenses or Subscription	\$ 11,817	\$ 15,336	\$ 17,260	\$ 18,845	\$ 20,129
5100	510	Supplies	\$ 54,660	\$ 55,260	\$ 60,800	\$ 72,922	\$ 76,641
5100	520	Textbooks	\$ 209,804	\$ 89,235	\$ 104,400	\$ 109,879	\$ 116,069
5100	642	Furniture, Fixtures (Non Capitalized)	\$ 107,299	\$ 27,480	\$ 9,710	\$ 7,688	\$ 6,872
5100	644	Computer Hardware (Non Capitalized)	\$ 33,985	\$ 10,855	\$ 5,387	\$ 4,253	\$ 2,467
Function 5100 - Basic Instruction Sub Total			\$ 3,571,627	\$ 4,099,661	\$ 4,417,937	\$ 4,746,408	\$ 4,952,315
Function 5200 - Exceptional Education							
5200	120	Classroom Teacher Salaries	\$ 89,045	\$ 92,607	\$ 96,311	\$ 100,163	\$ 104,170
5200	130	Other Certified Staff Member	\$ 55,000	\$ 57,200	\$ 59,488	\$ 61,868	\$ 64,342
5200	140	Substitute Teachers	\$ 2,790	\$ 2,902	\$ 2,902	\$ 2,902	\$ 2,902
5200	210	Retirement	\$ 3,889	\$ 4,045	\$ 4,207	\$ 4,375	\$ 4,550
5200	220	FICA	\$ 11,233	\$ 11,682	\$ 12,141	\$ 12,617	\$ 13,113
5200	230	Group Insurance	\$ 20,936	\$ 20,936	\$ 20,936	\$ 20,936	\$ 20,936
5200	240	Worker's Compensation	\$ 1,468	\$ 1,527	\$ 1,587	\$ 1,649	\$ 1,714
5200	250	Unemployment Compensation	\$ 6,237	\$ 6,237	\$ 6,237	\$ 6,237	\$ 6,237
5200	310	Professional and Technical Services	\$ 181,600	\$ 211,079	\$ 233,542	\$ 251,914	\$ 268,366
5200	360	Rentals	\$ 204	\$ 207	\$ 210	\$ 213	\$ 217
5200	642	Furniture, Fixtures (Non Capitalized)	\$ 3,105	\$ -	\$ -	\$ -	\$ -
5200	644	Computer Hardware (Non Capitalized)	\$ 1,307	\$ -	\$ -	\$ -	\$ -
Function 5200 - Exceptional Education Sub Total			\$ 376,814	\$ 408,421	\$ 437,559	\$ 462,874	\$ 486,546

Proposed Operating Budget

Naples Classical Academy

			FY21	FY22	FY23	FY24	FY25
Students			759	870	956	1019	1074
Function 6100 - Pupil Services							
6100	130	Other Certified Staff Member	\$ 42,000	\$ 43,680	\$ 45,427	\$ 47,244	\$ 49,134
6100	160	Other Support Personnel	\$ 23,400	\$ 24,336	\$ 25,309	\$ 26,322	\$ 27,375
6100	210	Retirement	\$ 1,134	\$ 1,179	\$ 1,227	\$ 1,276	\$ 1,327
6100	220	FICA	\$ 5,003	\$ 5,203	\$ 5,411	\$ 5,628	\$ 5,853
6100	230	Group Insurance	\$ 6,979	\$ 6,979	\$ 6,979	\$ 6,979	\$ 6,979
6100	240	Worker's Compensation	\$ 654	\$ 680	\$ 707	\$ 736	\$ 765
6100	250	Unemployment Compensation	\$ 567	\$ 567	\$ 567	\$ 567	\$ 567
6100	310	Professional and Technical Services	\$ 800	\$ 914	\$ 1,030	\$ 1,046	\$ 1,167
6100	360	Rentals	\$ 68	\$ 69	\$ 70	\$ 71	\$ 72
6100	510	Supplies	\$ 393	\$ 455	\$ 506	\$ 548	\$ 587
6100	642	Furniture, Fixtures (Non Capitalized)	\$ 1,950	\$ -	\$ -	\$ -	\$ -
6100	644	Computer Hardware (Non Capitalized)	\$ 436	\$ -	\$ -	\$ -	\$ -
Function 6100 - Pupil Services Sub Total			\$ 83,384	\$ 84,062	\$ 87,234	\$ 90,416	\$ 93,826
Function 6200 - Instructional Media Services							
Function 6200 - Instructional Media Services Sub Total			\$ -	\$ -	\$ -	\$ -	\$ -
Function 6300 - Instructional/Curriculum Development							
6300	130	Other Certified Staff Member	\$ 39,000	\$ 40,560	\$ 42,182	\$ 43,870	\$ 45,624
6300	210	Retirement	\$ 1,053	\$ 1,095	\$ 1,139	\$ 1,184	\$ 1,232
6300	220	FICA	\$ 2,984	\$ 3,103	\$ 3,227	\$ 3,356	\$ 3,490
6300	230	Group Insurance	\$ 6,979	\$ 6,979	\$ 6,979	\$ 6,979	\$ 6,979
6300	240	Worker's Compensation	\$ 390	\$ 406	\$ 422	\$ 439	\$ 456
6300	250	Unemployment Compensation	\$ 189	\$ 189	\$ 189	\$ 189	\$ 189
6300	642	Furniture, Fixtures (Non Capitalized)	\$ 1,270	\$ -	\$ -	\$ -	\$ -
6300	644	Computer Hardware (Non Capitalized)	\$ 1,307	\$ -	\$ -	\$ -	\$ -
Function 6300 - Instructional/Curriculum Development Sub Total			\$ 53,171	\$ 52,331	\$ 54,138	\$ 56,017	\$ 57,970
Function 6400 - Instructional Staff Training							
6400	310	Professional and Technical Services	\$ 30,500	\$ 31,668	\$ 35,852	\$ 39,318	\$ 13,585
Function 6400 - Instructional Staff Training Sub Total			\$ 30,500	\$ 31,668	\$ 35,852	\$ 39,318	\$ 13,585
Function 6500 - Instructional-Related Technology							
6500	642	Furniture, Fixtures (Non Capitalized)	\$ 21,359	\$ 81	\$ 33	\$ 33	\$ -
6500	643	Computer Hardware-Capitalized	\$ 39,200	\$ 14,063	\$ -	\$ -	\$ -
6500	644	Computer Hardware (Non Capitalized)	\$ -	\$ 70,766	\$ -	\$ -	\$ -
Function 6500 - Instructional-Related Technology Sub Total			\$ 60,560	\$ 84,910	\$ 33	\$ 33	\$ -
Function 7100 - Board							
7100	310	Professional and Technical Services	\$ 2,000	\$ 11,165	\$ 14,423	\$ 9,411	\$ 9,552
7100	320	Insurance and Bond Premiums	\$ 24,750	\$ 27,225	\$ 29,948	\$ 32,942	\$ 36,236
7100	330	Travel	\$ 1,500	\$ 1,523	\$ 1,545	\$ 1,569	\$ 1,592
7100	790	Miscellaneous Expenses	\$ 500	\$ 102	\$ 103	\$ 105	\$ 106
Function 7100 - Board Sub Total			\$ 28,750	\$ 40,014	\$ 46,019	\$ 44,026	\$ 47,487

Proposed Operating Budget

Naples Classical Academy

			FY21	FY22	FY23	FY24	FY25
		Students	759	870	956	1019	1074
Function 7200 - General Administration							
7200	310	Management Fee	\$ 771,284	\$ 897,021	\$ 1,060,143	\$ 1,145,862	\$ 1,221,949
7200	730	District Fee	\$ 101,369	\$ 103,263	\$ 111,365	\$ 56,356	\$ 56,932
		Function 7200 - General Administration Sub Total	\$ 872,653	\$ 1,000,284	\$ 1,171,508	\$ 1,202,218	\$ 1,278,881
Function 7300 - School Administration							
7300	110	Administrator Salaries	\$ 225,600	\$ 234,624	\$ 244,009	\$ 365,985	\$ 380,625
7300	160	Other Support Personnel	\$ 82,400	\$ 85,696	\$ 89,124	\$ 92,689	\$ 96,396
7300	210	Retirement	\$ 8,316	\$ 8,649	\$ 8,995	\$ 12,384	\$ 12,880
7300	220	FICA	\$ 23,562	\$ 24,504	\$ 25,485	\$ 35,089	\$ 36,492
7300	230	Group Insurance	\$ 48,850	\$ 48,850	\$ 48,850	\$ 62,807	\$ 62,807
7300	240	Worker's Compensation	\$ 3,080	\$ 3,203	\$ 3,331	\$ 4,587	\$ 4,770
7300	250	Unemployment Compensation	\$ 1,323	\$ 1,323	\$ 1,323	\$ 1,701	\$ 1,701
7300	310	Professional and Technical Services	\$ 29,899	\$ 4,789	\$ 4,905	\$ 5,014	\$ 5,119
7300	320	Insurance and Bond Premiums	\$ 3,775	\$ 4,153	\$ 4,568	\$ 5,025	\$ 5,527
7300	330	Travel	\$ 1,500	\$ 1,523	\$ 1,545	\$ 1,569	\$ 1,592
7300	360	Rentals	\$ 18,486	\$ 21,355	\$ 23,713	\$ 25,798	\$ 27,601
7300	370	Communications	\$ 3,885	\$ 4,225	\$ 4,510	\$ 4,750	\$ 4,975
7300	390	Other Purchased Services	\$ 241,530	\$ 161,224	\$ 160,327	\$ 178,393	\$ 172,473
7300	510	Supplies	\$ 11,705	\$ 12,633	\$ 13,620	\$ 15,452	\$ 16,096
7300	641	Furniture, Fixtures-Capitalized	\$ 2,809	\$ -	\$ -	\$ -	\$ -
7300	642	Furniture, Fixtures (Non Capitalized)	\$ 29,588	\$ 140	\$ -	\$ 4,035	\$ -
7300	643	Computer Hardware-Capitalized	\$ -	\$ -	\$ -	\$ -	\$ -
7300	644	Computer Hardware (Non Capitalized)	\$ 5,831	\$ 3,243	\$ -	\$ 1,215	\$ -
7300	692	Computer Software	\$ 2,835	\$ 2,878	\$ 2,921	\$ 2,964	\$ 3,009
7300	730	Dues and Fees	\$ 1,124	\$ 1,141	\$ 1,158	\$ 1,175	\$ 1,193
		Function 7300 - School Administration Sub Total	\$ 746,098	\$ 624,151	\$ 638,383	\$ 820,632	\$ 833,257
Function 7400 - Facilities Acquisition							
7410	360	Lease	\$ 1,230,000	\$ -	\$ -	\$ -	\$ -
7420	660	Land	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -
7410	680	Remodeling/Renovations	\$ 650,000	\$ -	\$ -	\$ -	\$ -
7420	680	Remodeling/Renovations	\$ 11,146,346	\$ -	\$ -	\$ -	\$ -
		Function 7400 - Facilities Acquisition Sub Total	\$ 15,026,346	\$ -	\$ -	\$ -	\$ -
Function 7500 - Fiscal Services							
7500	310	Professional and Technical Services	\$ -	\$ -	\$ -	\$ -	\$ -
		Function 7500 - Fiscal Services Sub Total	\$ -	\$ -	\$ -	\$ -	\$ -
Function 7600 - Food Services							
7600	160	Other Support Personnel	\$ 31,360	\$ 32,614	\$ 33,919	\$ 35,276	\$ 36,687
7600	210	Retirement	\$ 847	\$ 881	\$ 916	\$ 952	\$ 991
7600	220	FICA	\$ 2,399	\$ 2,495	\$ 2,595	\$ 2,699	\$ 2,807
7600	230	Group Insurance	\$ 6,979	\$ 6,979	\$ 6,979	\$ 6,979	\$ 6,979
7600	240	Worker's Compensation	\$ 1,882	\$ 1,957	\$ 2,035	\$ 2,117	\$ 2,201
7600	250	Unemployment Compensation	\$ 189	\$ 189	\$ 189	\$ 189	\$ 189
7600	570	Food	\$ 446,954	\$ 518,408	\$ 577,103	\$ 623,620	\$ 666,522
7600	641	Furniture, Fixtures-Capitalized	\$ 26,710	\$ -	\$ -	\$ -	\$ -
7600	642	Furniture, Fixtures (Non Capitalized)	\$ 1,969	\$ -	\$ -	\$ -	\$ -
7600	644	Computer Hardware (Non Capitalized)	\$ 436	\$ -	\$ -	\$ -	\$ -
7600	692	Computer Software	\$ 500	\$ 508	\$ 515	\$ 523	\$ 531
		Function 7600 - Food Services Sub Total	\$ 520,223	\$ 564,030	\$ 624,250	\$ 672,353	\$ 716,906

Proposed Operating Budget

Naples Classical Academy

			FY21	FY22	FY23	FY24	FY25
Students			759	870	956	1019	1074
Function 7900 - Operation of Plant							
7900	160	Other Support Personnel	\$ 58,640	\$ 60,986	\$ 63,425	\$ 65,962	\$ 68,601
7900	210	Retirement	\$ 1,583	\$ 1,647	\$ 1,712	\$ 1,781	\$ 1,852
7900	220	FICA	\$ 4,486	\$ 4,665	\$ 4,852	\$ 5,046	\$ 5,248
7900	230	Group Insurance	\$ 13,957	\$ 13,957	\$ 13,957	\$ 13,957	\$ 13,957
7900	240	Worker's Compensation	\$ 3,518	\$ 3,659	\$ 3,806	\$ 3,958	\$ 4,116
7900	250	Unemployment Compensation	\$ 189	\$ 189	\$ 189	\$ 189	\$ 189
7900	320	Insurance and Bond Premiums	\$ 74,784	\$ 82,262	\$ 90,488	\$ 99,537	\$ 109,491
7900	350	Repairs and Maintenance	\$ 134,490	\$ 136,508	\$ 154,009	\$ 156,319	\$ 158,664
7900	360	Rental Space	\$ 136	\$ 138	\$ 140	\$ 142	\$ 144
7900	370	Communications	\$ 34,830	\$ 28,136	\$ 28,249	\$ 28,673	\$ 29,103
7900	381	Water and Sewage	\$ 34,933	\$ 40,465	\$ 45,009	\$ 48,752	\$ 52,219
7900	382	Garbage	\$ 7,080	\$ 7,186	\$ 7,294	\$ 7,403	\$ 7,514
7900	390	Other Purchased Services	\$ 28,909	\$ 39,899	\$ 40,497	\$ 41,105	\$ 41,721
7900	430	Electricity	\$ 71,238	\$ 72,307	\$ 73,391	\$ 74,492	\$ 75,610
7900	510	Supplies	\$ 18,358	\$ 21,225	\$ 23,581	\$ 25,522	\$ 27,321
7900	642	Furniture, Fixtures (Non Capitalized)	\$ 1,617	\$ -	\$ -	\$ -	\$ -
7900	644	Computer Hardware (Non Capitalized)	\$ 436	\$ -	\$ -	\$ -	\$ -
Function 7900 - Operation of Plant Sub Total			\$ 489,185	\$ 513,227	\$ 550,600	\$ 572,838	\$ 595,749
Function 8100 - Maintenance of Plant							
8100	350	Repairs and Maintenance	\$ 3,026	\$ 3,071	\$ 8,660	\$ 8,790	\$ 8,921
8100	510	Supplies	\$ 1,681	\$ 1,706	\$ 1,732	\$ 1,758	\$ 1,784
Function 8100 - Maintenance of Plant Sub Total			\$ 4,707	\$ 4,778	\$ 10,392	\$ 10,548	\$ 10,706
Function 8200 - Administrative Technology Services							
8200	310	Professional and Technical Services	\$ 77,448	\$ 97,123	\$ 100,163	\$ 103,271	\$ 104,820
Function 8200 - Administrative Technology Services Sub Total			\$ 77,448	\$ 97,123	\$ 100,163	\$ 103,271	\$ 104,820
Function 9100 - Community Service							
9100	330	Travel	\$ 3,710	\$ 4,695	\$ 5,922	\$ 11,615	\$ 17,173
9100	642	Furniture, Fixtures (Non Capitalized)	\$ 5,618	\$ 6,553	\$ 8,802	\$ 13,487	\$ 15,707
9100	730	Dues and Fees	\$ 4,620	\$ 5,322	\$ 7,521	\$ 11,342	\$ 13,018
Function 9100 - Community Service Sub Total			\$ 13,948	\$ 16,570	\$ 22,245	\$ 36,444	\$ 45,898
Function 9200 - Debt Service							
9200	711	Principal	\$ 114,564	\$ 122,846	\$ 131,727	\$ 141,249	\$ 151,460
9200	721	Interest	\$ -	\$ 1,153,589	\$ 1,144,708	\$ 1,135,186	\$ 1,124,975
9200	730	Debt Fees	\$ 6,500	\$ 6,500	\$ 6,500	\$ 6,500	\$ 6,500
9200	710	Loan Principal - Start up Loans	\$ -	\$ -	\$ -	\$ -	\$ -
Function 9200 - Debt Service Sub Total			\$ 121,064	\$ 1,282,935	\$ 1,282,935	\$ 1,282,935	\$ 1,282,935
3%		Contract Reserve Fund	\$ 191,223	\$ 31,081	\$ 40,428	\$ 21,031	\$ 18,749
\$ 20,000		Board Reserve Fund	\$ 20,000	\$ -	\$ -	\$ -	\$ -
Total Expenses			\$22,076,478	\$8,904,165	\$9,479,247	\$10,140,331	\$10,520,882
Total Income			\$23,588,900	\$8,058,886	\$9,474,159	\$10,229,445	\$10,899,269
Net Cash Contributed			\$1,512,421	(\$845,279)	(\$5,088)	\$89,114	\$378,388
End of Year Operational Cash On Hand			\$1,637,859	\$761,499	\$715,983	\$784,067	\$1,143,705
Contract Reserve Fund Balance			\$191,223	\$222,304	\$262,732	\$283,763	\$302,512

Y. Proposed Startup Budget

Y.1 Startup Budget

Naples Classical Academy

Income Estimates			
FEFP Calculations			
Total FEFP Income			\$ -
Other Income			
	3440	Gifts, Grants and Bequests	\$ 575,000
	3720	Financing / Loan Proceeds	\$ 500,000
Total Other Income			\$ 1,075,000
Total Income			\$ 1,075,000
Expense Estimates			
Function 5100 - Basic Instruction			
5100	360	Annual Software Licenses or Subscription	\$ 901
5100	520	Textbooks	\$ 69,935
5100	642	Furniture, Fixtures (Non Capitalized)	\$ 124,277
5100	644	Computer Hardware (Non Capitalized)	\$ 11,328
Function 5100 - Basic Instruction Sub Total			\$ 206,441
Function 5200 - Exceptional Education			
5200	642	Furniture, Fixtures (Non Capitalized)	\$ 1,035
5200	644	Computer Hardware (Non Capitalized)	\$ 436
Function 5200 - Exceptional Education Sub Total			\$ 1,471
Function 6100 - Pupil Services			
6100	642	Furniture, Fixtures (Non Capitalized)	\$ 650
6100	644	Computer Hardware (Non Capitalized)	\$ 145
Function 6100 - Pupil Services Sub Total			\$ 795
Function 6200 - Instructional Media Services			
Function 6200 - Instructional Media Services Sub Total			\$ -
Function 6300 - Instructional/Curriculum Development			
6300	642	Furniture, Fixtures (Non Capitalized)	\$ 806
6300	644	Computer Hardware (Non Capitalized)	\$ 145
Function 6300 - Instructional/Curriculum Development Sub Total			\$ 952
Function 6400 - Instructional Staff Training			
Function 6400 - Instructional Staff Training Sub Total			\$ -
Function 6500 - Instructional-Related Technology			
6500	642	Furniture, Fixtures (Non Capitalized)	\$ 5,876
6500	643	Computer Hardware-Capitalized	\$ 13,067
Function 6500 - Instructional-Related Technology Sub Total			\$ 18,942
Function 7100 - Board			
7100	310	Professional and Technical Services	\$ 10,000
7100	330	Travel	\$ 13,000
Function 7100 - Board Sub Total			\$ 23,000
Function 7200 - General Administration			
Function 7200 - General Administration Sub Total			\$ -

Naples Classical Academy

Function 7300 - School Administration			
7300	110	Administrator Salaries	\$ 90,000
7300	160	Other Support Personnel	\$ 17,680
7300	210	Retirement	\$ 2,907
7300	220	FICA	\$ 8,238
7300	230	Group Insurance	\$ 10,468
7300	240	Worker's Compensation	\$ 1,077
7300	250	Unemployment Compensation	\$ 567
7300	310	Professional and Technical Services	\$ 233,913
7300	330	Travel	\$ 10,000
7300	360	Rentals	\$ 829
7300	370	Communications	\$ 1,650
7300	390	Other Purchased Services	\$ 33,579
7300	641	Furniture, Fixtures-Capitalized	\$ 936
7300	642	Furniture, Fixtures (Non Capitalized)	\$ 4,058
7300	643	Computer Hardware-Capitalized	\$ 1,200
7300	644	Computer Hardware (Non Capitalized)	\$ 2,060
7300	692	Computer Software	\$ 3,195
7300	730	Dues and Fees	\$ 984
Function 7300 - School Administration Sub Total			\$ 423,341
Function 7400 - Facilities Acquisition			
Function 7400 - Facilities Acquisition Sub Total			\$ -
Function 7500 - Fiscal Services			
7500	310	Professional and Technical Services	\$ 7,200
Function 7500 - Fiscal Services Sub Total			\$ 7,200
Function 7600 - Food Services			
7600	641	Furniture, Fixtures-Capitalized	\$ 8,903
7600	642	Furniture, Fixtures (Non Capitalized)	\$ 456
7600	644	Computer Hardware (Non Capitalized)	\$ 145
Function 7600 - Food Services Sub Total			\$ 9,505
Function 7800 - Pupil Transportation			
Function 7800 - Pupil Transportation Sub Total			\$ -
Function 7900 - Operation of Plant			
7900	360	Rental Space	\$ 17
7900	370	Communications	\$ 3,600
7900	642	Furniture, Fixtures (Non Capitalized)	\$ 354
7900	644	Computer Hardware (Non Capitalized)	\$ 145
Function 7900 - Operation of Plant Sub Total			\$ 4,116
Function 8100 - Maintenance of Plant			
Function 8100 - Maintenance of Plant Sub Total			\$ -
Function 8200 - Administrative Technology Services			
8200	310	Professional and Technical Services	\$ 19,561
Function 8200 - Administrative Technology Services Sub Total			\$ 19,561

Naples Classical Academy

Function 9100 - Community Service			
		Function 9100 - Community Service Sub Total	\$ -
Function 9200 - Debt Service			
9200	730	Debt Fees	\$ 6,500
9200	710	Loan Principal - Start up Loans	\$ 41,516
		Function 9200 - Debt Service Sub Total	\$ 48,016
Total Expenses			\$763,339
Total Income			\$1,075,000
Net Cash Contributed			\$311,661
End of Year Operational Cash On Hand			\$336,661

Y.2 Balance Sheets

Naples Classical Academy	
Balance Sheet	
<u>Fiscal Year 2021</u>	
	Startup
ASSETS	
Cash and cash equivalents	\$ 336,661
Total Assets	<u>\$ 336,661</u>
LIABILITIES AND FUND BALANCE	
Liabilities	
Accounts payable	\$ -
Total Liabilities	<u>-</u>
Fund Balance	
Unrestricted	336,661
Total Fund Balance	<u>336,661</u>
TOTAL LIABILITIES AND FUND BALANCE	<u>336,661</u>

Y.3 Revenue Projections and Source

Startup Revenue	Source
\$16,650,000 35-year bond at 7.5 percent interest	This bond will originate with BB&T or a similar lender. Bond income is included in the first year of operation.
\$500,000 unsecured loan at 8 percent interest	This unsecured loan will be sourced from The Optima Foundation.
\$575,000 CSP grant	This grant is based on prior team experience in obtaining grants.

Z. Evidence of external funding, if applicable.

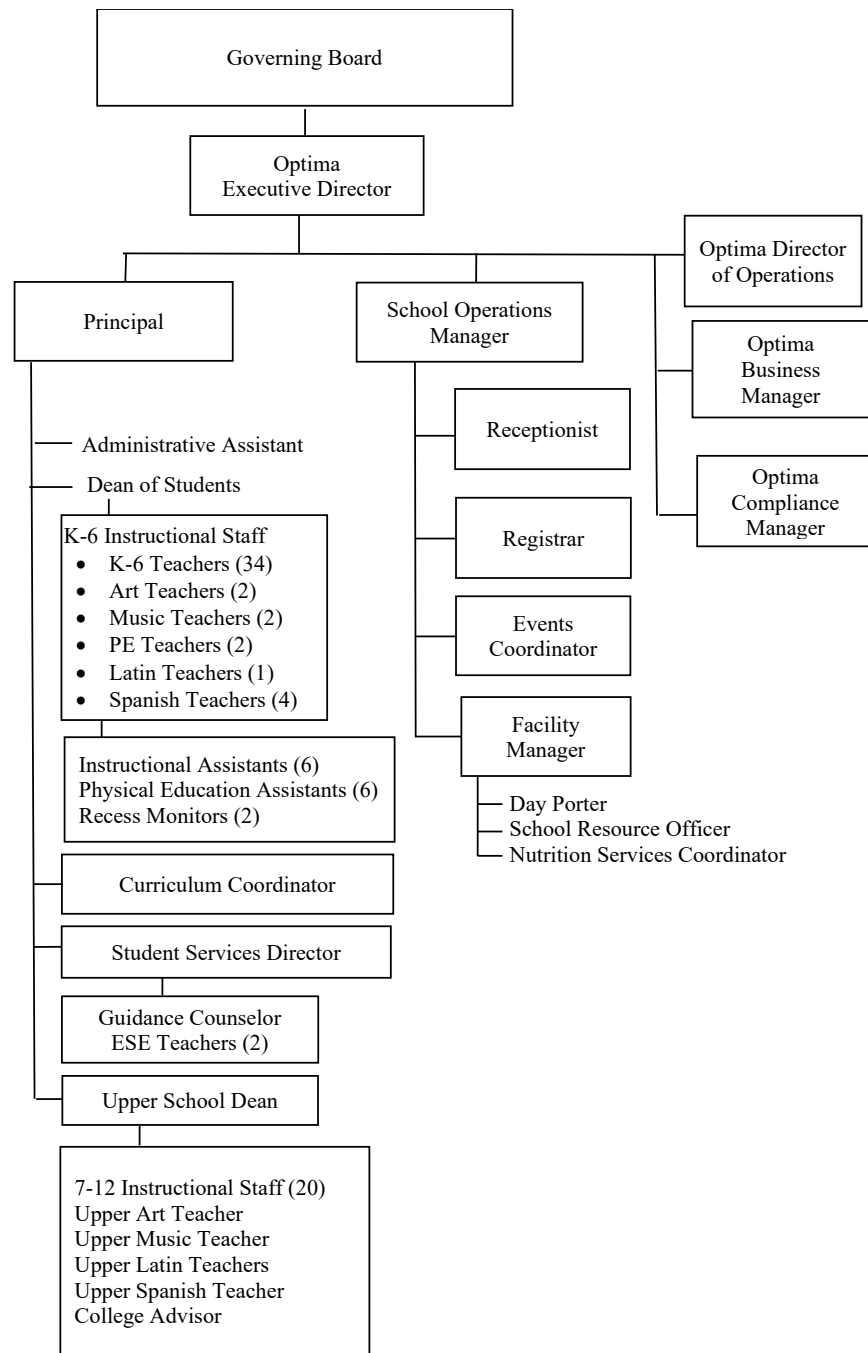
This item is not applicable.

Addendum (as applicable)

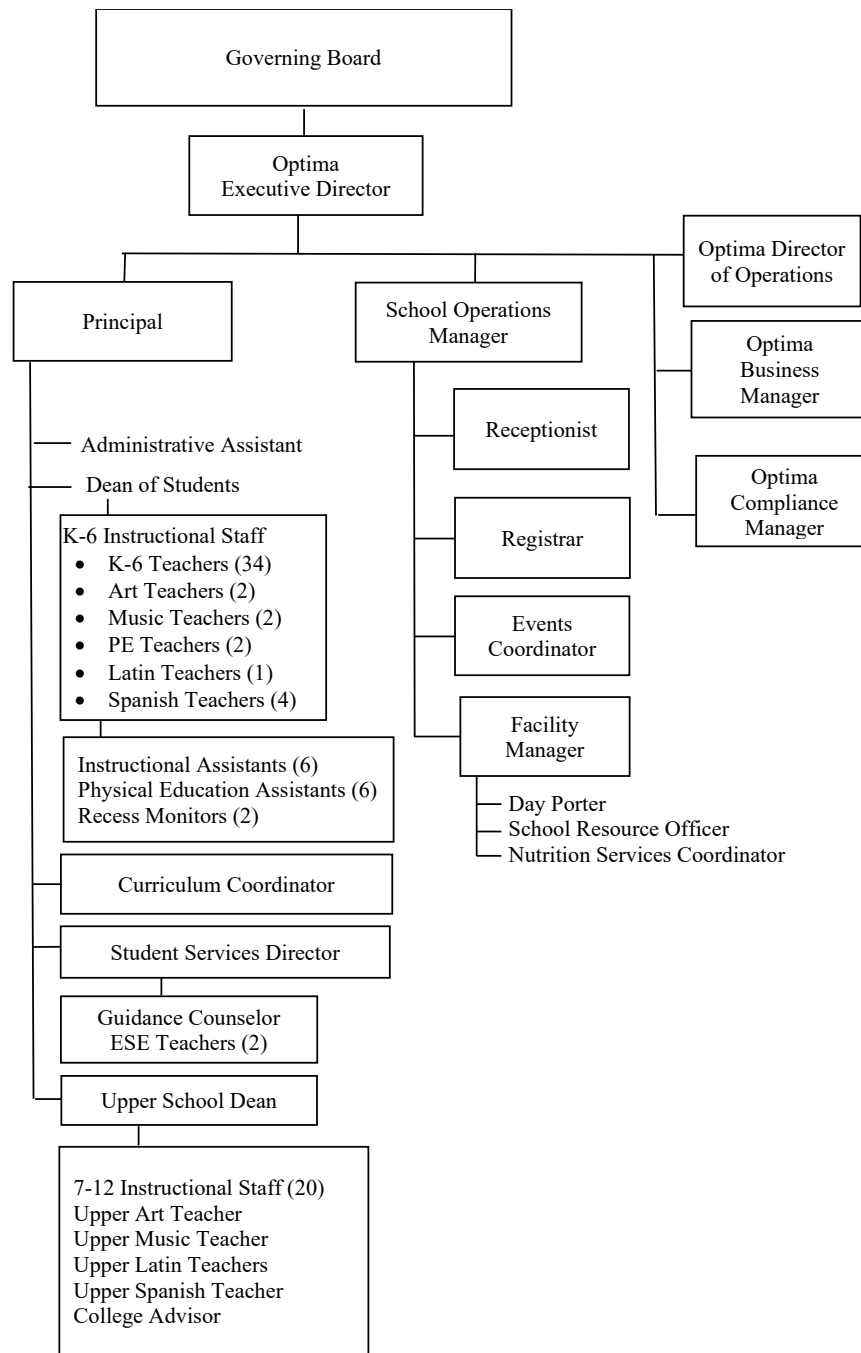
AA. Commissioner's letter(s) of verification of high-performing status

This item is not applicable.

BB. ESP's organization chart



CC. ESP's organization chart after any anticipated growth



DD. Applicant history worksheet

Applicant history worksheets for Matt Mathias, Chuck Marshall, and Erika Donalds are enclosed as Attachment DD.

EE. Draft contract between school and ESP

SERVICE AGREEMENT

This Service Agreement (the "**Agreement**") is made and entered into as of the ____ day of _____, 20____, by and between **The Optima Foundation, Inc.**, a Florida non-profit corporation (the "**Service Provider**"), and **TBD Classical Academy**, a Florida non-profit corporation (the "**School**").

RECITALS

- A. School will submit a Charter Application to the ____ County School District (the "Sponsor") to operate a charter school pursuant to a Charter School Contract ("Charter Contract") in accordance with the Florida Statutes Section 1002.33 et. seq. and other laws applicable to Florida Charter Schools ("Applicable Laws" or "Charter School Law") in ____ County, Florida, under the name of "TBD Classical Academy" ("Charter School"). Service Provider will contact the ____ County School District ("Charter School Sponsor") to encourage support for the Charter Application and Charter Contract.
- B. After conducting all appropriate due diligence, including review of the experience of Service Provider's staff, verification that the Fee for Services ("Fee") is reasonable and consistent with the market for such services, and review of the need for business and operational administrative services, the School agrees that it is in the best interest of School to enter into this Agreement with Service Provider.
- C. The School and Service Provider desire to create an enduring educational alliance, whereby the School and Service Provider will work together to replicate the Hillsdale College Barney Charter School Initiative model.
- D. Service Provider is a nonprofit organization formed for the purpose of supporting public charter schools such as the School, with the mission to provide professional business administration services which will allow instructional personnel, including the Principal, maximum time and resources to meet the needs of students.
- E. Service Provider desires to establish certain best practices and procedures for charter schools within its network in order to qualify for system accreditation with AdvancEd, and School has determined it is in its best interest to join such network to attain such accreditation.
- F. In order to facilitate the organization and opening of the School; including acquisition, equipping, construction or renovation of a charter school facility ("Facility"); and to implement an exceptional educational program at the School, the parties desire to establish this arrangement for Service Provider to act in the role similar to an Executive Director of the School, overseeing the non-instructional and operational aspects of the School.

Therefore, for good and valuable consideration, the receipt of which is hereby acknowledged, it is mutually agreed as follows:

ARTICLE I
CONTRACTING RELATIONSHIP

- A. **Recitals.** The foregoing recitals are true and correct and incorporated herein by reference.
- B. **Authority and Compliance with Charter Contract and Applicable Laws.** The Charter School represents that it is authorized by law to contract with Service Provider and for Service Provider to provide business and operational administrative services to the Charter School. The parties acknowledge that all such services must be provided in accordance with the Charter Contract and all State and Federal laws governing public charter schools (referred to collectively herein as “Applicable Laws”). In the event the Sponsor expresses concerns regarding any of the provisions in this Agreement, the Parties agree to work together and with the Sponsor to resolve such concerns.
- C. **Agreement.** Service Provider’s obligations to the Charter School and rights with respect to the business and operational administrative services provided to the Charter School shall be only as expressly set forth in this Agreement. Duties required to be carried out by the Charter School which are not expressly set forth herein as being Service Provider’s responsibility shall remain the sole responsibility of the Charter School’s Governing Board. Notwithstanding the foregoing, Service Provider acknowledges that it shall be engaged by the Board to perform the services set forth in this Agreement on the basis of the knowledge and expertise of the Service Provider. Each party represents and warrants to the other that it has disclosed all matters relevant to the services Service Provider might provide to the Charter School.
- D. **Designation of Agents.** The Board designates the employees of Service Provider as agents of the Charter School having a legitimate educational interest such that they are entitled to access to educational records under 20 U.S.C. §1232g, the Family Rights and Privacy Act ("FERPA") and other applicable law. The Board hereby authorizes Service Provider to communicate with and negotiate on the Board's behalf with all Federal, state and local government agencies and the Sponsor unless specifically instructed otherwise by the Charter School.
- E. **Background Screening.** Service Provider agrees that each of its owners, board members, officers, employees, and agents who will be accessing Charter School grounds when students are present or who have direct contact with students, will undergo and meet Level 2 screening and fingerprint requirements as described in Fla. Stat. §§ 1012.32 and 435.04 and as conducted by the Charter School or Sponsor. Service Provider also agrees that any of its employees or contractors handling funds or finances of the Charter School will be subjected to the screening and fingerprinting requirements required by law for such positions.
- F. **Status of the Parties.** Service Provider is a non-profit Florida corporation qualified to do business in Florida, and is not a division or a part of the School. The School is a non-profit Florida corporation authorized (or seeking to be authorized) by the Charter Contract and Sponsor to operate a charter school, and is not a division or part of Service Provider. The

parties to this Agreement intend that the relationship created by this Agreement is that of an independent contractor and not employer - employee. Except as expressly provided in this Agreement, no agent or employee of Service Provider shall be deemed to be the agent or employee of the School. Service Provider shall be solely responsible for its acts and the acts of its agents, employees and subcontractors. The relationship between Service Provider and the School is based solely on the terms of this Agreement, and the terms of any other written agreements between Service Provider and the School.

- G. **No Related Parties or Common Control.** Service Provider will not have any role or relationship with School that, in effect, substantially limits School's ability to exercise its rights, including termination rights, under this Agreement. School and Service Provider will not be members of the same control group, as defined in Section 1.150-1(e) of the Treasury Regulations under the Internal Revenue Code of 1986, as amended from time to time (collectively, the "1986 Applicable Laws"), or related persons, as defined in Section 144(a)(3) of the 1986 Applicable Laws.
- H. **No Disparagement.** The parties agree that a good working relationship involves mutual respect and decorum. Therefore, during the Term of this Agreement, no party will make (or cause or encourage anyone else to make) any disparaging, untrue, or misleading written or oral statements about or relating to the other party or about or relating to any officer, director, shareholder, agent, employee, or other person acting on such party's behalf. This provision is not intended to prevent or curtail truthful and factual statements made in order to redress issues related to performance of duties under this Agreement by either party.
- I. **Intellectual Property Rights.** Except as otherwise required by Hillsdale College pursuant to its arrangements contained in any Agreement between it and the School, the School will own all proprietary rights to materials that (i) are both directly developed and paid for by the School; or (ii) were developed by Service Provider at the direction of the Board with School funds dedicated for the specific purpose of developing such materials (the "**School Materials**"). Service Provider shall own all proprietary rights to, and the School's proprietary interest shall not include, materials that are or were developed or copyrighted or similarly protected by Service Provider. Service Provider shall also own all intellectual property rights, including, without limitation, any copyright rights in and to any non-curriculum materials created or provided by Service Provider, including all corrections, modifications and derivatives thereof (collectively all of the foregoing shall be referred to as the "**Service Provider Materials**"). The parties acknowledge that to the extent the School's Materials are derivative of Service Provider Materials, the School's intellectual property ownership rights extend only to the new, original aspects of such works and not to any underlying or pre-existing material.

Service Provider hereby grants to the School the non-exclusive, non-transferable license to use the Service Provider Materials in furtherance of its programs during the term of this Agreement, including without limitation, the right to reproduce, publicly display, distribute, and create derivatives of same, in hard copy format, or electronically via the School's intranet. To the extent any part of the School Materials may be a derivative of Service Provider Materials, the School shall have the non-exclusive, non-transferable right

to use such Service Provider Materials, as same may have been previously embodied or incorporated in the School Materials, beyond the termination or expiration of this Agreement solely in connection with the operation of the School and in the ordinary course of such operations. The School represents and warrants that during the term of this Agreement, or following the expiration or termination of this Agreement, the School will not exploit, or assist any third party in exploiting, the School Materials or any Service Provider Materials for commercial purposes. The School hereby grants Service Provider the non-exclusive, irrevocable, worldwide, assignable right to use, distribute, modify and display the School Materials solely for education purposes in any and all media now known or hereafter developed.

Service Provider hereby grants the School the non-exclusive, non-transferable license to use Service Provider's trade name and any trademark(s) (collectively, the "Service Provider Trademarks"), as they now exist or in the future, to promote and advertise the School. No other use of Service Provider Trademarks is permitted without Service Provider's prior written permission. The School shall acquire no rights in the Service Provider trademarks, and all goodwill of the Service Provider Trademarks shall inure to the benefit of and remain with Service Provider. Service Provider shall have pre-approval rights for each form and manner of public display of the Service Provider Trademarks.

School grants permission to Service Provider to represent themselves as a fundraising and business partner of the School.

ARTICLE II

TERM

- A. **Term.** This Agreement will be effective on the date hereof and shall remain in effect through the last day of the Charter Contract, as that term may be amended from time to time (the "Term"). This Agreement may be terminated by the School prior to the expiration of the term as set forth in this Agreement. Within the Term are two Phases: "Planning Years" and "Operating Years". During the Planning Years, there are three Periods as defined in Schedule A of this Agreement.
- B. **Renewal.** The Term of this Agreement will be renewed upon renewal of the Charter Contract and extend through the length of such renewed Charter Contract, unless, (i) written notice of intent to terminate or renegotiate is given by either party not less than 180 days prior to the expiration of the Term, or (ii) this Agreement is earlier terminated.

ARTICLE III FUNCTIONS OF SERVICE PROVIDER

- A. **Attendance of Governing Board Meetings and Communication with Governing Board.** A representative of Service Provider shall attend all meetings of the Board. The Service Provider will coordinate with the chairperson of the Board and Charter Principal as to items that need to be placed on the Agenda, and will prepare the Agenda for Board Meetings. The Service Provider will also coordinate with the Board as to its schedule and arrange for proper notice of Board Meetings as such notice is required by the Charter Contract and Applicable Laws. The Service Provider will provide monthly/quarterly financial reports to the Board, as described herein. The Service Provider will also provide back-up items to the Board a sufficient number of days prior to each Board Meeting to allow for review by Board Members to be prepared for the Board Meeting.
- B. **Administrative Services.** For the Term of this Agreement, subject to the Charter School Contract and the approval of the Board of Directors of School (the "Board"), Service Provider will provide to School for the Charter School the following administrative services (the "Administrative Services"):
- a. **Personnel Management.** Management and professional development of all personnel providing Educational and Administrative Services in accordance with this Agreement. Service Provider will assist the School Board in hiring and evaluation of all instructional and non-instructional personnel, including the Head of School. All Charter School personnel shall be employees of School. Service Provider will make recommendations regarding firing and disciplinary decisions, but responsibility for final decisions on such matters shall be for the Head of School or School Board, as appropriate. The Board will not unreasonably reject Service Provider's recommendations regarding personnel.
 - b. **Facility Operation and Maintenance.** Coordination with entities with which Service Provider contracts on behalf of School for the provision of operation and maintenance services for the Charter School's facility (the "Facility") to the extent consistent with any and all documents pertaining to the Facility, together with the management and assessment of the services provided under such contracts and/or the supervision of employees involved in providing such services.
 - c. **Business Administration.** Administration of all business aspects of School operation, including by way of example and not limitation, financial management, compliance management (including compliance with state accountability requirements), legal/corporate upkeep, books and records maintenance, and management of equipment/furniture/property. Recommend, manage, oversee and coordinate with human resource service provider and other vendors. Administration of business by Service Provider will only be conducted as allowed by the Charter Contract.
 - d. **Government Relations.** Coordination and assistance with any and all government relations efforts, including maintaining positive relationships with local and state elected officials and staff and facilitating the pursuit of approvals from government agencies, such as approval of the charter application and contract, approval of zoning and land use changes, and other governmental approvals as required.
 - e. **Public Relations.** Coordination and assistance with any and all advertising, media

and public relations efforts, including outreach programs. All public relations will be subject to the mutual approval by School and Service Provider, from which approval may not be unreasonably withheld.

- f. **Budgeting, Budgeting Process, Financial and Other Reporting.** Preparation of a proposed annual budget (the "Charter School Budget") for each Fiscal Year, in coordination with the Board and Principal, subject to the reasonable approval of the Board acting in its fiduciary capacity. For purposes of this Agreement, the term "Fiscal Year" shall have the meaning as provided in the Charter Contract. The projected Charter School Budget will include, but not be limited to, the financial details relating to the Administrative Services to be provided pursuant to this Agreement, any proposed capital expenditures with respect to the Facility, each disposition of property with respect to the Facility, and any rates or fees charged for use of the Facility.
 - i. Service Provider shall deliver a draft of the Charter School Budget for each Fiscal Year to the Board not less than forty-five (45) days prior to the date on which the Charter School Budget for any Fiscal Year must be submitted to Sponsor and/or any State governmental agency. The Board shall review the Charter School Budget within ten (10) business days following the receipt thereof (the "Budget Review Period") which review may include an independent evaluation of the Charter School Budget by such accountants, attorneys, and other financial advisors that the Board deems necessary or desirable. The Board shall deliver any comments or objections to the Charter School Budget prior to the expiration of the Budget Review Period. Within five (5) business days following the expiration of the Budget Review Period, the President of School and the Chief Executive Officer of Service Provider shall reconcile any comments or objections made by the Board during the Budget Review Period. Service Provider and School shall agree to a final Charter School Budget for each such year not later than two (2) business days prior to the date on which the Charter School Budget must be submitted to the Sponsor and/or any other State governmental agency.
 - ii. Working in cooperation with the Board, Service Provider shall prepare, for Board approval, modifications or amendments to the Charter School Budget which may be necessitated by changes in projections or circumstances or the occurrence of unexpected events, which impact projected revenue and/or expense items contained in the approved Charter School Budget.
 - iii. Service Provider shall provide the Board with an enrollment report stating the number of actual students enrolled at the Charter School (an "Enrollment Report"). If an Enrollment Report indicates that enrollment is lower than that which was projected in the Charter School Budget and such lower enrollment number shall materially adversely impact the Charter School Budget for such Fiscal Year, Service Provider shall propose a plan to remediate the shortfall, including but not limited to: student recruitment efforts to restore the enrollment level to the projected enrollment; cost-cutting measures; or borrowing recommendations.
- g. The preparation of detailed statements of all revenues received, from whatever source, with respect to the Charter School, and detailed statements of all expenses, including an accounting of all expenditures for services rendered to, or on behalf of,

- the Charter School by Service Provider, whether incurred on-site or off-site.
- h. The preparation of other financial statements as required by and in compliance with the Charter School Contract, the Applicable Laws and other applicable laws and regulations, including such documentation as may be reasonably required by the independent certified public accountants retained by the Board to perform annual audits of School's financial statements. The cost for preparation of the annual financial statements and independent financial audits will be responsibility of School and will be provided for in the Charter School Budget.
 - i. The preparation of such other reports on a periodic basis, relative to the finances and operation of School, as the same may be requested or required by the Florida Department of Education or the Sponsor to ensure compliance with the terms of the Charter School Contract and applicable law.
 - j. Other information on a periodic basis reasonably necessary to enable School to monitor Service Provider's performance under this and related agreements including the effectiveness and efficiency of its operations at School.
- C. **Maintenance of Financial and Student Records.** Service Provider will maintain accurate financial and student records pertaining to start-up and operation of School, together with all School financial records prepared by Service Provider. Such records will be the property of School. Such records shall be maintained by Service Provider at School in physical or electronic form and will be made available to the Sponsor and the School Governing Board's Auditor within no more than three business days of a request. Such records shall otherwise be made available and retained in accordance with Florida's Public Records Act.
- a. Service Provider will maintain accurate student records pertaining to the students enrolled at the Charter School as is required and in the manner provided by the Charter School Contract, the Applicable Laws and regulations and retain such records permanently on behalf of School or until this Agreement or its successor (if any) is terminated, at which time such records will be transferred to School and become the sole responsibility of the Board. Service Provider and School will maintain the proper confidentiality of personnel, students and other records as required by law and the Charter Contract.
 - b. School shall be entitled at any time upon reasonable written notice to Service Provider to audit the books and records of Service Provider pertaining to its start-up and operation of the Charter School pursuant to this Agreement (including, without limitation, the financial records relating thereto), provided that any such audit shall be at the sole expense of School.
- D. **Additional Administrative Services.** Any other services reasonably necessary or expedient for the effective administration of School as agreed to, in writing, from time to time by Service Provider and the Board.
- E. **Provision of Administrative Services.** The Administrative Services will be provided in a manner consistent with the Applicable Laws and the Charter School Contract with the Sponsor.
- F. **Modification of Administrative Services.** Subject to this Agreement, the Charter School Contract, Sponsor oversight and approval, as applicable, and the Applicable Laws, Service Provider may modify the methods, means and manner by which such Administrative Services are provided at any time, provided that School will have the right to approve all material changes.
- G. **Budgeting for Administrative Services.** Service Provider will be responsible and

accountable to the Board for the provision of all Administrative Services, provided that such obligations, duties and responsibilities are expressly limited by the Charter School Budget. Service Provider will not be required to expend funds on such services in excess of the amounts set forth in such Charter School Budget.

- H. **Provision of Services during Planning Years.** The parties acknowledge that the 2019-20 and 2020-21 School Years will be a Planning Years for the School. The School intends for its first year of operation to be the 2021-22 School Year, but the Board is entitled to also take the 2021-22 School Year as a Planning Year and open for the 2022-23 School Year (“Delayed Opening”).
- I. **Start-up Operational Services.** During any Planning Year, Service Provider will lead and manage start-up operational services for the School.
- a. Service Provider will serve as liaison with Hillsdale College Barney Charter School Initiative (BCSI) to implement the BCSI academic program.
 - b. Service Provider will prepare the Charter Application, establish a relationship with the Charter School Sponsor, and follow the protocols for application approval.
 - c. Service Provider will negotiate the Charter Contract with the Charter School Sponsor.
 - d. Service Provider will prepare all necessary applications, identify and apply for additional funding from federal, state, local and private sources, and oversee compliance with grant or lender requirements. Service Provider will also coordinate with School’s legal representation, as required.
 - e. Service Provider will establish branding, create a website, prepare marketing materials, and establish a social media presence for the School.
 - f. Service Provider will assist with selection of the School site location and development, facility planning, financing and buildout management, permitting, government/public relations and site construction management.
 - g. Service Provider will procure and evaluate vendors, make purchases within limits established by the Board and provide compliance oversight for contracts and regulations.
 - h. Service Provider will lead public and government relations and provide marketing tools for community outreach. Service Provider will promote the school in the community and maintain a database of contracts including parents, donors and volunteers.
 - i. Service Provider will create the School’s policies and procedures, safety programs, forms and manuals.
 - j. Service Provider will assist the School with board development, recruitment and training.
 - k. Service Provider will work with the School to provide reporting due during the Planning Years and after the effective date of the Charter Contract.
- J. **Place of Performance; Subcontracting.** Service Provider may provide Administrative Services either at the Charter School Facility or elsewhere, or through subcontracts, unless prohibited by the Charter School Contract, the Applicable Laws and other applicable laws and regulations.
- K. **Student Recruitment.** Service Provider and the Board shall be jointly responsible for the recruitment of students. Students shall be selected in accordance with the procedures set forth in the Charter Contract and in compliance with the Charter School Law and other

Applicable Laws.

- L. **Rules and Procedures.** Service Provider shall recommend to the Board reasonable rules, regulations and procedures applicable to the School, and Service Provider is authorized and directed by the Board to enforce the rules, regulations and procedures adopted by the Board.
- M. **School Year and School Day.** The school year and the school day schedule shall be approved by the Board.
- N. **Principal Search and Hiring.** Service Provider will facilitate a nationwide search for the school's Principal for a target start date of September 1, 2020. Service Provider will assist in the evaluation of candidates for presentation to Hillsdale College and to the Board.

ARTICLE IV PERSONNEL & TRAINING

- A. **Personnel Responsibility.** Subject to the limitations of this Agreement, the Charter School Contract, the Applicable Laws and other applicable laws and regulations, Service Provider will assist the Board in determining staffing levels necessary to carry out the services provided under this Agreement, all within the financial constraints of the Charter School Budget approved by the Board. Service Provider shall identify and propose for employment by or on behalf of School qualified principals, teachers, paraprofessionals, administrators, and other staff members and education professionals for positions in the School.
- B. **Principal.** School and Service Provider acknowledge and agree that the accountability of Service Provider to School is an essential foundation of this Agreement, and the responsibility of the administrator of School (the "Principal") is critical to the success of School. The Board and Service Provider will work together to select and supervise the Principal and hold the Principal accountable for the success of School. Service Provider will recommend the employment contract with the Principal to the School's Governing Board for its approval, including the proposed duties and compensation of the Principal. Service Provider will conduct an annual evaluation of the Principal for presentation to the Board.
- C. **Support Staff.** Service Provider will propose for employment by or on behalf of School support staff/non-instructional personnel for employment by School. Such support staff may include, among others, clerical staff and administrative assistants, bookkeepers and maintenance personnel. Such support staff may work at School on a full or part time basis. The Principal will not make any hiring offers or terminate any support staff/non-instructional personnel. Service Provider will consult the Principal on all evaluations of such staff.
- D. **Training.** Service Provider will provide or arrange for training (i) in the instructional methods and curriculum, which comprise the Educational Program set forth in the Charter Application and in cooperation with the Principal, and (ii) with regard to support technology to the teachers and other instructional personnel on a regular and continuous

basis, as stated in the Charter School Contract and in cooperation with the Principal. Service Provider shall arrange, at the School's expense, or provide training for non-instructional personnel at a frequency that Service Provider determines reasonable and necessary under the circumstances.

- E. **Employee Benefits.** Service Provider will develop a package of employee benefits that will be provided to School Employees.
- F. **Limitations on Discretion.** All decisions made by Service Provider, and any discretion exercised by Service Provider, in its selection, evaluation, assignment, discipline, and transfer of personnel shall be consistent with the Budget, the Charter Contract and state and federal law.

ARTICLE V

OBLIGATIONS OF THE BOARD

- A. **Good Faith Obligation.** The Board shall be responsible for its fiscal and academic policy. The Board shall exercise good faith in considering the recommendations of Service Provider, including but not limited to, Service Provider's recommendations concerning policies, rules, regulations and budgets. The Board remains ultimately responsible for fiduciary oversight and management for the operation of the Charter School.
- B. **Assistance to Service Provider.** The Board shall cooperate with Service Provider and shall furnish Service Provider with all documents, records and information necessary for Service Provider to properly perform its responsibilities under this Agreement, including but not limited to, timely notice of all Board meetings. The Board will provide to Service Provider access to all account information for Charter School, as well as all information related to revenues received by the Charter School from any source.
- C. **Unusual Events and Potential Charter Violations.** The Board agrees to timely notify Service Provider of any anticipated or known: (i) material health or safety issues, (ii) labor, employee or funding problems, or (iii) problems of any other type that could adversely affect Service Provider's ability to comply with its responsibilities hereunder or compliance with the Charter Contract.
- D. **Service Provider Office Space.** The Board upon request shall provide Service Provider with suitable space at the School for Service Provider personnel and subcontractors. The space shall be provided without additional cost to Service Provider and shall be used by Service Provider only for Service Provider activities related to the School.
- E. **Retained Authority.** The Board shall retain the authority to make reasonable regulations relative to anything necessary for the proper establishment, maintenance, management, and operation of the School including, without limitation, regulations relative to the conduct of pupils while in attendance at the School or en route to and from the School. The Board shall further retain the responsibility to adopt written policies governing the procurement

of supplies, materials and equipment.

- F. **Annual Review and Feedback to Service Provider.** The Board will annually review the Service Provider's performance and provide feedback on such performance to Service Provider at a publicly noticed meeting. Notwithstanding the foregoing, the parties recognize the importance of ongoing communication of expectations and feedback is critical to a successful working relationship. The Board will strive to communicate any concerns it may have throughout the year rather than reserve such comments for the Annual Review.
- G. **Compliance with the School's Agreement with Hillsdale College.** In order to maintain the consistency and integrity of the School's mission and vision, the School and Service Provider will at all times during the term of this Agreement remain in compliance with the obligations of the School's Agreement with Hillsdale College.

ARTICLE VI FINANCIAL ARRANGEMENTS

- A. **Revenues.** Except as hereinafter provided, all monies received by the Board shall be deposited in the School's depository account within three (3) business days with a financial institution acceptable to the Board. Interest income earned on School depository accounts shall accrue to the School. Except as specifically excluded by the terms of this Agreement, the term "**Revenues**" shall include all funds received by or on behalf of the School, including but not limited to:
- a. Funding for public school students enrolled at the School.
 - b. Special education funding provided by federal and state government which is directly allocable to special education students enrolled at the School.
 - c. Gifted and talented funding provided by federal and state governments that is directly allocable to gifted and talented students enrolled at the School.
 - d. At-Risk funding provided by federal and state governments that is directly allocable to at-risk students enrolled at the School.
 - e. Funding provided by federal and state governments that is directly allocable to students enrolled at the School with limited English proficiency.
 - f. All other federal and state funding sources, including but not limited to Title I and any start-up funding, allocable to the School, to extent allowable by law.
 - g. All other funding, contributions and donations, public and private, received by the School (except to the extent Service Provider is not required or involved in soliciting, administering, or managing the contribution and/or donation).

(All of the above are hereinafter collectively referred to as the "**Revenues**").

- B. **Fee.** School will pay Service Provider as provided for in Schedule A of this Agreement for the Planning Years and Delayed Opening, as applicable. Beginning on July 1 of the School's first Operating Year, and for the remainder of the Term of this Agreement, School will pay Service Provider an annual fee equal to twelve percent (12%) of School's Gross Revenue for each School Year ("Fee"), payable in twelve monthly installments. The monthly payments shall be adjusted throughout the year to reflect actual Gross Revenue.

For purposes of this Agreement the term “Gross Revenue” shall mean the School’s Revenues excluding any proceeds from borrowings undertaken by School.

- C. **Reasonable Compensation and Ownership of Funds.** The Fee under this Agreement is reasonable compensation for services rendered. Service Provider's compensation under this Agreement will not be based, in whole or in part, on a share of net surplus or profits from the operation of the Charter School. Any funds received by School, and not spent on its behalf, belong to School, and not to Service Provider. Any funds advanced to Service Provider for payments on behalf of School belong to School until the point that they are legally expended by Service Provider on behalf of School.
- D. **Order of Payment of Expenses and Fee Deferral.** Expenses of the Charter School shall be paid each month in accordance with the approved Budget and in the following order of priority: (1) School’s obligations under any agreement or other financing document relating to the issuance of bonds, notes or related debt to finance the Facility, (2) Salaries and Benefits, (3) payments on any outstanding notes; (4) other operating expenses, and (5) monthly prorated Fee. In the event there are insufficient funds to pay Fees in a month to pay the monthly prorated Fee, such Fees will be deferred and accrue as an account payable until such time as there are sufficient funds to make payment. In the event that there are insufficient funds at the end of any Fiscal Year of the Charter School to pay the monthly or deferred Fees, such outstanding Fees shall be payable (together with reasonable interest charges or late payment fees) no later than the end of five years after the original due date of payment. Payment of the Fee shall be subordinate to payment of any outstanding obligations under any agreement or other financing document relating to the issuance of bonds, notes or related debt to finance the Facility.
- E. **Reimbursements.** The School will reimburse Service Provider for all commercially reasonable costs and operational expenses incurred and paid by Service Provider in providing the Administrative Services to School. Other expenses will be provided by, or reimbursed to, The Optima Foundation, Inc.
- F. **Payments to Service Provider.** Service Provider will receive the monthly installment of its Fee on or before the fifteenth (15th) day of each month.
- G. **No Transfer of Assets.** No Charter School assets will be transferred to the Service Provider except for payment of the Fee for services set forth herein, reimbursement of expenses as allowed by this Agreement and other assets transferred upon approval of Charter School Board and Service Provider and payment by Service Provider to Charter School of a fair market value for such assets.
- H. **Other Revenue Sources.** School and Service Provider may, together or independently, fundraise, solicit and receive grants and donations from public and private sources consistent with the mission of the School and in the name of the School; provided, however, that (i) any solicitation of such grants by Service Provider that are in excess of One Hundred Thousand Dollars (\$100,000) shall be subject to the prior approval of the Board, (ii) all such funds received by Service Provider or School from such other revenue sources shall

be deemed to be School funds, and (iii) Service Provider shall not be required to administer any grants that are not specifically approved, in writing, by Service Provider, in advance.

- I. **Availability of Funds.** Service Provider shall only be required to perform its responsibilities under this Agreement to the extent that there are sufficient Revenues to make payments in accordance with the terms of the Budget.
- J. **Other Schools.** The School acknowledges that Service Provider may enter into similar agreements with other public schools. Service Provider shall maintain separate accounting records for expenses incurred by and on behalf of the School and other schools, and shall reflect in the School's financial records only expenses incurred by or on behalf of the School. If Service Provider incurs authorized expenses on behalf of the School and other schools which are incapable of precise allocation, then to the extent permitted by law, Service Provider shall allocate such expenses among all applicable schools, including the School, on a prorated basis based upon the number of students enrolled at the applicable schools, or upon such other equitable basis as is acceptable to the parties.
- K. **Annual Audit.** The Board shall select and retain an independent auditor to conduct an annual audit of the School in accordance with the School's Charter Contract and the Charter School Laws. Subject to applicable law, all records in the possession or control of Service Provider that relate to the School, including but not limited to financial records, shall be made available to the School's independent auditor.
- L. **Other Financing.** The Board may apply to Service Provider for financing or other financial assistance from time to time. Financing or financing assistance extended by Service Provider to the School shall be separately documented.

ARTICLE VII

TERMINATION OF AGREEMENT

- A. **Termination for Cause.** This Agreement may be terminated for cause by either party at any time upon the occurrence of the any of the reasons for Default, following the requisite notice and time period for opportunity for cure, if applicable, as set forth in this Agreement, and provision of written notice of such termination of same to the other party.
- B. **Default.** In addition to the events of default ("Material Default") described above, the following shall be the only other events of Material Default under this Agreement:
 - a. The School fails to make any payment due hereunder to the Service Provider within ten (10) days after the date such payment was due.
 - b. The School materially breaches any of its other obligations under this Agreement and fails to cure such material breach within thirty (30) days after receipt of written notice of such breach.
 - c. Service Provider or School commence any case or proceeding, or file any petition in bankruptcy, or for reorganization, liquidation or dissolution, or be adjudicated, insolvent or bankrupt, or apply to any tribunal for a receiver, intervener, conservator or trustee for itself or for any substantial part of its property; or if there shall be commenced against it any such action and the same shall remain un-dismissed for

more than sixty (60) days.

- d. Service Provider is found by an administrative or judicial body to have made fraudulent use of funds, or if an administrative or judicial body has revoked any license which is required for Service Provider to carry on its business and perform its obligations and functions under this Agreement.
 - e. Service Provider materially breaches this Agreement, which Material Breach would include, without limitation: (i) failure to account for the Service Provider's or School's expenditures or pay the School's operating costs (provided funds are available to do so), (ii) failure to follow policies, procedures or rules duly adopted by the Board which are not in violation of this Agreement or Applicable Laws, (iii) receipt by the Board of unsatisfactory reports concerning Service Provider's performance or the performance of the staff which are not adequately corrected or explained to the satisfaction of the Board, (iv) failure of Service Provider to perform its duties and obligations under this Agreement as set forth in an Annual Review or as determined, in the discretion of the Board, including but not limited to Service Provider's failure to adequately advise the Board of its obligations to start-up and operate the Charter School, or (v) there is a going concern finding in an independent financial audit of the School. In the event of a Material Breach, Service Provider shall have thirty (30) days after receipt of written notice from School to remedy said breach, unless the School approves a longer time to cure such breach.
- C. **Termination or Non-Renewal of Charter-**If the Sponsor cancels or otherwise revokes the Charter for the Charter School, Service Provider and School agree that such cancellation or revocation shall result in termination of this Agreement.
- D. **Transition.** In the event of termination of this Agreement for any reason by either party prior to the end of the Agreement's term, Service Provider may, for a fee reasonably acceptable to Service Provider, provide the School reasonable assistance for up to 90 days to assist in the transition to another administrative or structural arrangement (although Service Provider need not provide any assistance to another service provider).
- E. **Termination/Expiration.**
- a. **Effective Date of Termination.** In the event this Agreement is terminated by either party prior to the end of the term specified in Article II, absent a material breach or unusual and compelling circumstances, the termination will not become effective until the end of the then current Fiscal Year in which the notice of termination is issued.
 - b. **Removal of personal property.** Upon termination or expiration of this Agreement, Service Provider shall have the right to remove equipment and other assets owned or leased by Service Provider. Equipment and other assets owned by the School or leased by the School from third parties shall remain the property of the School.
 - c. **Advances/Out-of-Pocket Expenses/Deferred Fees.** Except as otherwise provided in this Agreement, upon termination or expiration of this Agreement for any reason, all advances or out-of-pocket expenses paid by Service Provider in accordance with the Budget, as well as any Deferred Fees, shall be immediately repaid by the School unless otherwise agreed in writing by Service Provider.

- F. **Change in Law.** If any federal, State or local law or regulation, court or administrative decision or Attorney General's opinion, including any change in law or appropriations relating to charter schools (a "Change in Law") has a materially adverse effect on the ability of either party to carry out its obligations under this Agreement, such party, upon written notice, may request renegotiation of this Agreement. Such renegotiation will be undertaken in good faith and may include the use of a third-party mediator for voluntary mediation, under the terms set forth in this Agreement. If the parties are unable to renegotiate the terms within 90 days after such notice and good faith negotiations, the party requesting the renegotiation may terminate this Agreement on 120 days' further written notice or at the end of a Fiscal Year, whichever is earlier.

ARTICLE VIII

INDEMNIFICATION AND INSURANCE

- A. **Indemnification.** To the extent permitted by applicable law, and as to the School, to the extent of the limits set forth in § 768.28, Florida Statutes, each party to this Agreement (the "Indemnifying Party") does hereby agree to indemnify and hold the other party (collectively the "Indemnified Party"), harmless from and against any and all claims, actions, damages, expenses, losses or awards which arise out of (i) the negligence of the Indemnifying Party, (ii) any action taken or not taken by the Indemnifying Party, or (iii) any noncompliance or breach by the Indemnifying Party of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Agreement. As used in this subsection, "Indemnified Party" shall include the party's trustees, directors, officers, employees, agents, representatives and attorneys. Such indemnification may be achieved by the joint purchase of general liability and property insurance policies, or by such other means as the parties may mutually agree. Such indemnification by the School is not intended as a waiver of sovereign immunity.
- B. **Insurance Coverage.** Each party shall maintain general liability insurance, including errors and omissions and crime coverage, in the amount of One Million Dollars (\$1,000,000.00) per occurrence (or such greater amount if required by the terms of the Charter Contract or applicable law), with the other party listed as an additional insured. In addition, the School shall maintain an umbrella liability policy of two million dollars (\$2,000,000.00) (or such greater amount if required by the terms of the Charter Contract or applicable law), with Service Provider listed as an additional insured. The School shall maintain insurance on the facility and related capital items as required by the terms of its Charter Contract, Real Estate Lease or financing documents, whichever is greater. Each party shall, upon request, present evidence to the other that it maintains the requisite insurance in compliance with the provisions of this paragraph. Each party shall comply with any information or reporting requirements required by the other party's insurer(s), to the extent reasonably practicable.

- C. **Workers' Compensation Insurance.** Each party shall maintain workers' compensation insurance as required by law, covering their respective employees.

ARTICLE IX

WARRANTIES AND REPRESENTATIONS

- A. **School Warranties and Representations.** The Board represents that, on behalf of and in the name of the School, it has the authority under law to execute, deliver and perform this Agreement and to incur the obligations provided for under this Agreement. The Board warrants that its actions have been duly and validly authorized, and that it will adopt any and all resolutions or expenditure approvals required for execution of this Agreement.
- B. **Service Provider Warranties and Representations.** Service Provider warrants and represents that it is a non-profit corporation in good standing and is authorized to conduct business in the State of Florida. Service Provider will comply with all registration and licensing requirements relating to conducting business under this Agreement. The Board agrees to assist Service Provider in applying for such licenses and permits and in obtaining such approvals and consents.
- C. **Mutual Warranties.** The School and Service Provider mutually warrant to the other that there are no pending actions, claims, suits or proceedings, to its knowledge, threatened or reasonably anticipated against or affecting it, which if adversely determined, would have a material adverse effect on its ability to perform its obligations under this Agreement.

ARTICLE X

MISCELLANEOUS

- A. **Sole Agreement.** This Agreement supersedes and replaces any and all prior agreements and understandings between the School and Service Provider.
- B. **Force Majeure.** Notwithstanding any other sections of this Agreement, neither party shall be liable for any delay in performance or inability to perform due to acts of God or due to war, riot, embargo, fire, explosion, sabotage, flood, accident, labor strike, or other acts beyond its reasonable control; provided either party may terminate this Agreement in accordance with the termination provisions contained in this Agreement if sufficient grounds exist as provided in the Article governing termination.
- C. **State Governing Law/Venue/Waiver of Jury Trial.** The rights of all parties hereto shall be subject to the jurisdiction of and be construed according to the laws of the State of Florida, with venue in Collier County, Florida. Service Provider and the School hereby waive the right to a jury trial in any action, proceeding or counterclaim brought by either Service Provider or the School against the other.
- D. **Agreement in Entirety.** This Agreement supersedes and replaces any and all prior agreements and understandings between School and Service Provider regarding the Charter

School.

- E. **Official Notices.** All notices and other communications required by the terms of this Agreement shall be in writing and sent to the parties hereto at the email or address set forth below. Notice may be given by (i) by electronic mail with evidence of confirmed receipt by the receiving party, (ii) certified or registered mail, postage prepaid, return receipt requested, or (iii) personal delivery. Notice shall be deemed to have been given on the date of transmittal if given by facsimile, date of delivery if given by personal delivery, or upon the date of postmark if sent by certified or registered mail. Notices to the School shall be sent to the current address of the then current Board President, with a copy to the then current Board attorney. The address of the parties hereto for the purposes aforesaid, inclusive of the address of the initial Board President and Board, are as follows:

The School:
TBD Classical Academy, Inc.
Attention: Board Chair Name, Chair
School Street Address
School Street Address
[School Email Address](#)

The Service Provider:
The Optima Foundation, Inc.
Attention: Erika Donalds, CEO
15275 Collier Blvd #201-299
Naples, FL 34119
erika@OptimaEd.org

- F. **Assignment.** Service Provider may assign this Agreement with the prior written consent of the Board.
- G. **Amendment.** This Agreement shall not be altered, amended, modified or supplemented except in writing approved by the Board and signed by an authorized officer of Service Provider and the Board.
- H. **Waiver.** No waiver of any provision of this Agreement shall be deemed or shall constitute a waiver of any other provision. Nor shall such waiver constitute a continuing waiver unless otherwise expressly stated.
- I. **Dispute Resolution; Costs and Attorneys' Fees.** In the event of any dispute between the parties hereto, the parties shall first attempt to settle the dispute through direct negotiation or informal mediation. The parties may agree to voluntary mediation, with the cost of the mediator shared between the parties and each party paying the cost of its own attorney(s). If the parties are unable to settle a dispute through direct negotiation or informal or formal voluntary mediation, the parties will be permitted to pursue their remedies in a court of competent jurisdiction. If any party commences an action against another party as a result of a breach or alleged breach of this Agreement, the prevailing party shall be entitled to have and recover from the losing party reasonable attorneys' fees and costs of suit.
- J. **Delegation of Authority.** Nothing in this Agreement shall be construed as delegating to Service Provider powers or authority of the Board which are not subject to delegation by the Board under Florida law.

- K. **Compliance with Law.** The parties to this Agreement agree to comply with all applicable laws and regulations.
- L. **Compliance with Charter Contract.** The parties to this Agreement agree to comply with the terms and conditions set forth in the Charter Contract.
- M. **Survival of Termination.** All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.
- N. **Binding Effect; Counterparts.** This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns. This Agreement may be executed in any number of counterparts, each of which shall be deemed an original and all of which together shall be deemed one and the same instrument.
- O. **Compliance with Florida's Public Records Act ("Act").** In accordance with Section 119.0701, Florida Statutes, Service Provider will comply with the requirements and the Act (Chapter 119, Florida Statutes) with respect to any records maintained by the Service Provider relating to the School and any other records maintained by Service Provider which are subject to such Act.
- P. **No Third-Party Rights.** This Agreement is made for the sole benefit of School and Service Provider, and their respective successors and assigns. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either of them, and any third person, including a relationship in the nature of a third-party beneficiary or fiduciary.
- Q. **No Inconsistent Tax Position.** Service Provider agrees that it is not entitled to and will not take any tax position that is inconsistent with being a service provider to the School with respect to the Facility, including but not limited to claiming any depreciation or amortization deduction, investment tax credit, or deduction for any payment as rent with respect to the Facility.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

“School”
TBD CLASSICAL ACADEMY, INC.

“Service Provider”
THE OPTIMA FOUNDATION, INC.

By: _____
Printed Name: _____
Its: Board Chair _____
Date: _____

By: _____
Printed Name: Erika Donalds _____
Its: President & CEO _____
Date: _____

FF. Supplemental Material

FF.1 After School Clubs and Sports

1. After School Clubs

The school will support and enrich students beyond academic classes by offering After school clubs. These activities promote a positive school spirit and provide additional learning opportunities for students. After school clubs include such activities as:

- Chess Club
- Chorus
- Creative Writing Club
- Dance Club
- Debate Club
- Drama Club
- Fencing Club
- Golf Club
- Lego Club
- Math Counts
- Odyssey of the Mind
- Scholar Bowl
- Select Choir Club
- Soccer Club
- Swim Club
- Scuba Club

After School Sports

The school will support and enrich students by offering after school sports programs to encourage and develop student health, fitness, and other physiological benefits related to participation in sports. These activities promote a positive school spirit and provide additional learning opportunities for students. After school sports include such activities as:

- Cross-Country Running Team
- Track and Field Team
- Soccer Team
- Volleyball Team
- Basketball Team

FF.2 Hillsdale College Barney Charter School Initiative Letter of Intention



October 2, 2019

Naples Classical Academy
C/o Erika Donalds
15275 Collier Blvd #201-299
Naples, FL 34119

Naples Classical Academy Board of Directors,

We are pleased by your interest in the curriculum and training offered to classical charter schools through Hillsdale College's Barney Charter School Initiative (BCSI). Our curriculum and support have been essential to the founding of more than twenty charter schools around the country, and we are dedicated to helping these schools reach excellence in their academics and operations. It is our intention to offer this same curriculum and support to Naples Classical Academy (NCA) subsequent to successful completion of our application process in January 2020.

We are careful in selecting and evaluating school collaborators. As such, we intend to provide our curriculum and training in the context of a formal agreement between our organizations, an agreement that will stipulate the details and conditions of our support, which as always shall be provided without cost to your organization.

At the request of the NCA Board we have provided this letter of intent to indicate our willingness to support NCA and to stipulate the nature of our involvement until such time as an official agreement has been executed. Provided the conditions established in this letter are met, we agree to permit NCA the following access to BCSI curriculum and support:

- NCA may use the BCSI Curriculum (*K-12 Program Guide*) and supporting documents in the preparation of its charter application to the Collier County School District. In the event that NCA and Hillsdale College do not enter into a formal agreement, NCA may still follow the academic program outlined in its charter application.
- NCA may represent itself as working towards or applying for a formal relationship with BCSI and Hillsdale College.



The prior permissions are contingent upon the following conditions:

- NCA must submit official and/or public documents that mention Hillsdale College or make specific reference to BCSI curriculum to Hillsdale College for prior notice and review. Hillsdale College retains the right to request sufficient time for review and to require changes in how Hillsdale College, BCSI, and BCSI curriculum are described.
- NCA is expected to participate in the application process that BCSI uses to determine its affiliate schools. This process will include, but is not limited to, board member interviews, school principal interviews, and reporting on NCA's progress towards establishing a school.

We look forward to working together as you complete the steps to start a school in Collier County.

Best Regards,

Dr. Kathleen O'Toole

Assistant Provost for K-12 Education