

# Florida Charter School Application Evaluation Instrument

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

## Capacity Interview:

Applicants may have the opportunity to present their plan and demonstrate the team’s capacity to open and maintain a high-quality charter school as well as to answer questions about their proposal. Any information or evidence from the capacity interview that is used by the sponsor as a basis for denial of the application must be properly documented by means of a recording or transcript.

The following definitions should guide the ratings:

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

Authorizers are encouraged to align their application review process with the Florida Principles and Standards for Quality Authorizing.

## OVERALL ASSESSMENT – COMPLETE THIS SECTION LAST

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

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

Name of Person Completing Assessment: Dawn Williams Date: 3/26/2021

Title: Supervisor of School Choice

Signature: *Dawn Williams*

**I. Educational Plan**

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

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

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

**Statutory References:**

s. 1002.33(2)

**Evaluation Criteria:**

A response that meets the standard will present:

- A clear and compelling mission and vision statement that defines the guiding principles and values of the school.
- Adequate references to evidence that the application fulfills the statutory guiding principles and purposes for charter schools. (Note: the substance of each addressed principle and purpose will be evaluated within appropriate application sections.)

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

Strengths	Reference
Mission is clear and strong. School will be centered on hands-on learning experiences. Evidence is provided for each of the statutory guiding principles. Questions were answered adequately during the interview process.	
Concerns and Additional Questions	Reference

**2. Target Population and Student Body**

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

**Statutory Reference(s):**

s. 1002.33(10)

**Evaluation Criteria:**

A response that meets the standard will present:

- A clear description of the students the charter school intends to serve including any target populations in accordance with Florida law.
- Alignment of the targeted student body with the overall mission of the school.

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

Strengths	Reference
Enrollment projections appear to be reasonable and consistent with the existing charter school currently operating in the same facility. Beginning with fewer grades in years 1 and 2 is a sound approach.	Application pages 9–10

Concerns and Additional Questions	Reference

**3. Educational Program Design**

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

**Statutory Reference(s):**

s. 1002.33(7)(a)2.

**Evaluation Criteria:**

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

- An educational program design that:
  - Is clear and coherent;
  - Is based on effective, experience or research-based educational practices and teaching methods, and high standards for student learning;
  - Aligns with the school’s mission and responds to the needs of the school’s target population, and
  - Is likely lead to improved student performance for the school’s target population.
- A proposed daily school schedule and annual calendar that complies with statutory requirements for annual number of instructional minutes/days and aligns with priorities and practices described in the educational program design.

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

Strengths	Reference
Based on effective experience as a successful charter school in the county already, (B.E.S.T. Academy) and evidence-based practices named in the application, the program design supports high standards for student learning. Questions were answered adequately during the interview process.	

Concerns and Additional Questions	Reference

**4. Curriculum Plan**

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

**Statutory Reference(s):**

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

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

- Provides a clear and coherent framework for teaching and learning;
- Is research-based;
- Is well-aligned with the school’s mission and educational philosophy;
- Provides an emphasis on reading;
- Will enable students to attain Florida standards and receive a year’s worth of learning for each year enrolled; and
- Will be appropriate for students below, at, and above grade level.

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

Strengths	Reference
Application Curriculum Plan intends to align with Hernando County School District Comprehensive Evidence-Based Reading Plan. Questions were answered adequately during the interview process.	

Concerns and Additional Questions	Reference

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

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

**Statutory Reference(s):**

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

**Evaluation Criteria:**

A response that meets the standard will present:

- An understanding of academic accountability provisions and goals mandated by the state.
- An indication that the applicant will hold high expectations for student academic performance.
- Measurable goals for student academic growth and improvement.
- Promotion standards that are based on high expectations and provide clear criteria for promotion from one level to the next, and for graduation (if applicable).
- Evidence that a range of valid and reliable assessments will be used to measure student performance.
- A proposed assessment plan that is sufficient to determine whether students are making adequate progress.
- Evidence of a comprehensive and effective plan to use student achievement data to inform decisions about and adjustments to the educational program.
- Plans for sharing student performance information that will keep students and parents well informed of academic progress.
- Acknowledgement of and general plan to meet FERPA requirements.

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

Strengths	Reference
Integrate multiple data points to gain accurate insights to support informed decision making.	

Concerns and Additional Questions	Reference

**6. Exceptional Students**

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

**Statutory Reference(s):**

s. 1002.33(16)(a)3.

**Evaluation Criteria:**

A response that meets the standard will present:

- A clear description of the programs, strategies and supports the school will provide to students with disabilities that will ensure appropriate access for students with disabilities and that the school will not discriminate based on disability.
- A clear description of how the school will ensure students with disabilities will have an equal opportunity of being selected for enrollment.
- A comprehensive and compelling plan for appropriate identification of students with special needs to ensure they are served in the least restrictive environment possible, have appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities in the same manner as non-disabled students, receive required and appropriate support services as outlined in their Individual Education Plans and 504 plans, and participate in standardized testing.
- An understanding and commitment to collaborating with the sponsor to ensure that placement decisions for students with disabilities will be made based on each student’s unique needs through the IEP process.
- An appropriate plan for evaluating the school’s effectiveness in serving exceptional students, including gifted.
- A realistic enrollment projection (SWD) and a staffing plan that aligns with the projections.

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

Strengths	Reference
Accountability of service	Page 38, section H

Concerns and Additional Questions	Reference
Modifications to assignments should only be provided for students on Access standards.	Page 36, section E, paragraph 3

**7. English Language Learners**

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

**Statutory Reference(s):**

s. 1002.33(10)(f)

**Evaluation Criteria:**

A response that meets the standard will present:

- Demonstrated understanding of legal obligations regarding the education of English Language Learners.
- A comprehensive and compelling plan for educating English Language Learner students that reflect the full range of programs and services required to provide all students with a high-quality education.
- A clear plan for monitoring and evaluating the progress of ELL students, including exiting students from ELL services.
- Demonstrated capacity to meet the school’s obligations under state and federal law regarding the education of English Language Learners.
- A realistic enrollment projection (ELL) and a staffing plan that aligns with the projections.

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

<b>Strengths</b>	<b>Reference</b>

<b>Concerns and Additional Questions</b>	<b>Reference</b>

**8. School Culture and Discipline**

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

**Statutory Reference(s):**

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

**Evaluation Criteria:**

A response that meets the standard will present:

- A planned school culture that is consistent with the school’s mission and congruent with the student discipline policy.
- An approach to classroom management and student discipline that is consistent with the overall school culture and philosophy.
- Recognition of legal obligations and children’s rights related to enforcing student discipline, suspension, and recommended expulsion, including the school’s code of conduct, if available.
- Consideration of how the code of conduct will apply to students with special needs.
- Appropriate and clear roles of school administrators, teachers, staff, and the governing board regarding discipline policy implementation.

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

Strengths	Reference
Follow HCSD Student Code of Conduct	

Concerns and Additional Questions	Reference
Reliance on district staff for weekly counseling and providing Tier 2 behavior support is not sustainable.	

**9. Supplemental Programming**

The Supplemental Programming section should describe extra and co-curricular activities offered by the school. This section is optional.

**Statutory Reference(s):**

NA

**Evaluation Criteria:**

A response that meets the standard will present:

- A clear description of extra- and co-curricular activities that support, and do not detract from, the educational program.
- Evidence of an adequate funding source for extra- and co-curricular activities.
- Lack of supplemental programming may not be a basis for denial.

Strengths	Reference

Concerns and Additional Questions	Reference

## II. Organizational Plan

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

### 10. Governance

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

#### Statutory Reference(s):

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

#### Evaluation Criteria:

A response that meets the standard will present:

- A governing board that is legally structured, or has a plan to organize in conformity with the laws of Florida.
- A clear description of the governing board’s roles, powers, and duties that are consistent with overseeing the academic, organizational, and financial success of the school.
- Appropriate delineation between governance and school management roles.
- At least the core of the Governing Board is identified that has a wide range of knowledge and skills needed to oversee a charter school.
- A board structure (e.g. bylaws and policies concerning member selection, committees, meeting frequency) that supports sustainable and effective school governance.
- Evidence that applicant understands and intends to implement open meeting and records laws.
- Clear policy and plan for dealing with conflicts of interest.
- Appropriate and clear role for any advisory bodies or councils if included.
- An outline of a grievance process (or policy) that will simultaneously address parent or student concerns and preserve appropriate governance and management roles.

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

Strengths	Reference
<p>The school is an active non-profit registered in the State of Florida. The organization has a plan for identifying conflicts of interest for its employees and a code of ethics in its Governance Manual. The organization has identified a Board of Directors and members who it seeks to serve on the board. The board structure includes appropriate policies concerning meeting procedures, frequency, compliance with public records laws and retention. The board structures maintains defined board composition as it relates to terms, and areas of expertise several members are to possess. Board member development and orientation are detailed. There will be no advisory bodies. The organization has a grievance and appeal process to address parent and student concerns.</p>	

Concerns and Additional Questions	Reference

**11. Management and Staffing**

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

**Statutory Reference(s):**

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

**Evaluation Criteria:**

A response that meets the standard will present:

- An organizational chart or charts that clearly and appropriately delineate lines of authority and reporting.
- A management structure that includes clear delineation of roles and responsibilities for administering the day-to-day activities of the school.
- Identification of a highly-qualified school leader or a sound plan for the recruitment and selection of the school leader.
- A viable and adequate staffing plan.
- A sound plan for recruiting and retaining highly-qualified and appropriately-certified instructional staff.

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

Strengths	Reference
Organizational Chart(s) Provided for before, during, and after first year of operation.	Section 11(A), per Attachment M (page 188)
Roles and responsibilities in leadership positions are clearly defined. <ul style="list-style-type: none"> <li>• Identification of a highly-qualified school leader</li> </ul>	Section 11(C), and per Attachment P

Concerns and Additional Questions	Reference
What is the staffing plan beyond the initial year of 1 Kindergarten Teacher and 1 Fifth Grade Teacher. How will clerical, custodial, classroom support be allocated? Where is a copy of the Staffing Plan?	In Section 11(A), per Attachment M (page 188), the organizational chart reflects two teachers reporting directly to the STEAM Principal in the first year of operation.

**12. Human Resources and Employment**

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

**Statutory Reference(s):**

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

**Evaluation Criteria:**

A response that meets the standard will present:

- A clear explanation of the relationship between employees and the school.
- Description of the school leader and teacher evaluation plans, or outline of such plans, which align with the Student Success Act as defined by state law.
- A compensation and benefits plan or outline of such a plan that is aligned with Florida’s Student Success Act, and will attract and retain quality staff.
- Procedures that are likely to result in the hiring of highly-effective personnel.
- Policies and procedures that hold staff to high professional standards or a plan to develop such policies and procedures.
- An effective plan to address any leadership or staff turnover.

<b>Meets the Standard</b> <input checked="" type="checkbox"/>	<b>Partially Meets the Standard</b> <input type="checkbox"/>	<b>Does Not Meet the Standard</b> <input type="checkbox"/>
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<b>Strengths</b>	<b>Reference</b>
A clear compensation and benefits plan is outlined.	
A plan to develop manuals is provided, and as such meets the standard.	Section 12(E)

<b>Concerns and Additional Questions</b>	<b>Reference</b>
<p>An example of the current You Thrive Personnel Manual was provided, as illustration of a plan. However, we do not have a copy of the proposed STEAM Staff Handbook, and in the response, it states, “We will follow the same procedures we currently follow for onboarding charter school staff.” HCSD has not been provided with a copy of the current Staff Handbook.</p> <p>In response to references, HR Director stated “This statement is referencing our personnel manual which pertains to an outside entity contacting our organization for a reference for a current or previous employee, this is not how we conduct our own employment reference checks for our new hires. Currently, we conduct reference checks for all new hires of all their previous employers, regardless of written consent”.</p> <p>Consent is not required to conduct incoming or outgoing references for staff that have student contact, as is required by FL Statute 1012.27. The employer has an obligation to both provide and obtain references in this capacity.</p>	<p>4. Section 12(E), per Attachment R, notes that revisions will be adopted and presented to the board within 60 days of charter approval, which aligns with the July timeline depicted in the application. What processes or materials will be used to onboard potential staff for the 2026–27 school year?</p> <ul style="list-style-type: none"> <li>• (page 15 of attachment R), bullet #5 “References with Written Approval.” Please note that hiring authorities are required to conduct reference checks with all previous employers for candidates who will have student contact. Written</li> </ul>

Additional review will need to take place once the following are completed: Employee Handbook Policies and Procedures Manual	approval from the employee or former employee is not required, as the hiring authority has an obligation to complete these checks. Florida Statute 1012.27
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### 13. Professional Development

The Professional Development section should clearly describe the proposed expectations and opportunities for administrators, teachers, and other relevant personnel.

#### Statutory Reference(s):

NA

#### Evaluation Criteria:

A response that meets the standard will present:

- Professional development activities for administrators and instructional staff that align with the educational program and support continual professional growth as well as growth in responsibilities related to specific job descriptions.

Strengths	Reference
The application discussed teacher participation in required induction, mentoring and PEC programs. It includes a satisfactory list of PL opportunities the teachers will engage in throughout the year to include required compliance trainings and that support continual professional growth.	

Concerns and Additional Questions	Reference
1 – The application does not address how they will ensure trainings meet the requirements outlined in Florida Statute 1012.98 (3a – j) 2 – Application assigns a Professional Learning Facilitator – there is no such job description. Please use “staff from the Professional Learning Dept” instead. 3 – The principal will be responsible for keeping all files required for audit for five years. 4 – The application does not talk about who is responsible for overseeing teachers that are flagged as out of field or how they will ensure they receive the proper training to be in compliance. 5 – How is the school providing individualized professional learning to teachers outside of what the district provides through mentoring and coaching?	Pp 66-68, section 13

**14. Student Recruitment and Enrollment**

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

**Statutory Reference(s):**

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

**Evaluation Criteria:**

A response that meets the standard will present:

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

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

Strengths	Reference
Sound plan for marketing, including direct outreach efforts (mailing postcards, participation at local family events). Utilizing multiple online platforms to share enrollment information. Open, non-selective process in accordance with Florida Statute. Laid out the lottery framework. Questions were answered adequately during the interview process.	

Concerns and Additional Questions	Reference

**15. Parent and Community Involvement**

The Parent and Community Involvement section should provide a broad overview of the school's plans to encourage and support parental and community involvement.

**Statutory Reference(s):**

NA

**Evaluation Criteria:**

A response that meets the standard will present:

- A general conception of how parents will be involved with the school that aligns with the school's mission and provisions of the educational program. A detailed plan may be developed following approval.

<b>Strengths</b>	<b>Reference</b>

<b>Concerns and Additional Questions</b>	<b>Reference</b>

### III. Business Plan

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

#### 16. Facilities

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

#### Statutory Reference(s):

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

#### Evaluation Criteria:

If a facility is acquired, reviewers will look for:

- Evidence that the proposed facility complies with all applicable laws, regulations, and policies and can be ready for the school’s opening OR a timeline to ensure the facility will be in compliance and ready by school’s opening.
- A facility that is appropriate and adequate for the school’s program and targeted population.
- Evidence that the school has the necessary resources to fund the facilities plan.
- A reasonable back-up plan should the proposed facility plan fall through.

If a facility is not yet acquired, reviewers will look for:

- A realistic sense of facility needs.
- A plan and timeline for securing a facility that is appropriate and adequate for the school’s program and targeted population.
- Reasonable projections of facility requirements.
- Evidence that the school has the necessary resources to fund the facilities plan.
- Adequate facilities budget based on demonstrated understanding of fair market costs.

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

Strengths	Reference
Continued use of an existing charter school facility is a sound approach.	Application page 74

Concerns and Additional Questions	Reference
Facility description lacks evidence of size(s) and layout of space(s) and alignment with the educational program, mandated class sizes, etc. However, use of an existing charter school facility which has been operational for years is presumed to be adequate.	Application pages 74, 358, 364 & 365  See also: <ul style="list-style-type: none"> <li>• F.S. 1002.33(9)(k)3</li> <li>• F.S. 1002.33(18)</li> <li>• 2023 FBC, 8th Ed., Section 468</li> </ul>

**17. Transportation**

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

**Statutory Reference(s):**

s. 1002.33(20)

**Evaluation Criteria:**

A response that meets the standard will present:

- An outline of a reasonable transportation plan that serves all eligible students and will not be a barrier to access for students residing within a reasonable distance of the school.

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

<b>Strengths</b>	<b>Reference</b>
The school will partner with HCSD Transportation Department.	

<b>Concerns and Additional Questions</b>	<b>Reference</b>
The HCSD school attendance zone selected.	

**18. Food Service**

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

**Statutory Reference(s):**

s. 1002.33(20)(a)1.

**Evaluation Criteria:**

A response that meets the standard will present:

- A food service plan that will serve all students and makes particular provisions for those students who may qualify for free or reduced price lunch.
- A food service plan that places an emphasis on quality, healthy foods.

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

Strengths	Reference

Concerns and Additional Questions	Reference
Transport of meals may require additional Food Services staff and vehicles.	

**19. School Safety and Security**

The School Safety and Security section should provide a description of the school’s plan to ensure the safety and security of its students and faculty.

**Statutory Reference(s):**

s. 1002.33(7)(a)11; s. 1002.33(16)(b)8, 12, and 14

**Evaluation Criteria:**

A response that meets the standard will present:

- A plan that reasonably ensures the safety of students and staff and the protection of the school facility and property. Note that a fully-developed plan will be completed after approval of the application.
- A description of how the school plans to comply with the requirement that at least one safe-school officer is present while school is in session.
- Procedures that clearly demonstrate a plan to respond to active assailant incidents.
- A description of how the school plans to train school staff to respond to active assailant incidents.
- A description of how the school will establish a team to assess and intervene with individuals whose behavior may post a threat to the safety of staff or students.

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

Strengths	Reference

Concerns and Additional Questions	Reference

**20. Budget**

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

**Statutory Reference(s):**

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

**Evaluation Criteria:**

A response that meets the standard will present:

- Budgetary projections that are consistent with and support all key aspects of the application, including the school’s mission, educational program, staffing plan, and facility.
- A realistic assessment of projected sources of revenue and expenses that ensure the financial viability of the school.
- A sound plan to adjust the budget should revenues not materialize as planned.

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

Strengths	Reference
The application is in compliance with the required account structure (Redbook) and appeared to use conservative budget methods.	

Concerns and Additional Questions	Reference
Using a shared facility and certain support staff may create unique challenges when allocating shared expenses. Additional due diligence will be required to ensure expenses are accurately accounted for and appropriately distributed between the two charter schools.	

**21. Financial Management and Oversight**

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

**Statutory Reference(s):**

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

**Evaluation Criteria:**

A response that meets the standard will present:

- A clear description of how the school’s finances will be managed, including who (or what contracted entity) will manage the finances. Such plan should contain strong internal controls to ensure appropriate fiscal management and ability to comply with all financial reporting requirements.
- A plan for the governing board to regularly exercise oversight over and take accountability for all financial operations of the school.
- Provisions for an annual financial audit.
- Appropriate public transparency of school financial health.
- Appropriate plan to securely store financial records.
- A plan to obtain appropriate and reasonable insurance coverage.

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

Strengths	Reference

Concerns and Additional Questions	Reference

**22. Start-Up Plan**

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

**Statutory Reference(s):**

s. 1002.33(7)(a)16.

**Evaluation Criteria:**

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

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

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

Strengths	Reference
Projected timeline appears sufficient for facility-related activities.	Application pages 89–90

Concerns and Additional Questions	Reference
1. Discussions with Sponsor (HCSD) (January-February 2026) should include charter school facility capacity and expansion plans applicable to concurrency reviews for residential development. 2. Moving facility safety & compliance checks to June 2026 would allow time to correct any identified deficiencies prior to opening.	Application pages 89–90  See also: <ul style="list-style-type: none"> <li>• F.S. 163.3180</li> <li>• F.S. 1013.35</li> </ul>

## Addendum

### Addendum A: Replications

The Replications section should identify the school to be replicated and provide evidence that the model has been successful in raising student achievement, while also describing the capacity of the organization to operate an additional school.

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

s. 1002.33(6)

#### **Evaluation Criteria:**

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

- Evidence that school or model to be replicated demonstrates academic, organizational, and financial success.
- A clear, compelling vision for what is being replicated in terms of essential components of the educational program.
- A convincing rationale for how the school or model to be replicated will successfully serve the proposed target student population.
- A strong justification for changing key components of the original school or model in the proposed school. Such justification should include why the changes will better suit the targeted student population and whether the model is still similar enough to the existing model that comparable successful outcomes are likely.
- Evidence that the applicant group has a sound plan for developing the capacity to replicate an existing school including adequate financial and human resources.
- If applicable, evidence of successful past replications or lessons learned from unsuccessful attempts at replication that will increase the probability that this replication will be successful.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Strengths</b>		<b>Reference</b>
<b>Concerns and Additional Questions</b>		<b>Reference</b>

**Addendum A1: High-Performing Replications**

The High-Performing Replications section should identify the school to be replicated and provide evidence that the proposed school meets the statutory requirements of being a substantially similar model of a school that has been designated as a High-Performing Charter School and is being established and operated by an organization or individuals that were significantly involved in the operation of the school being replicated.

**Statutory Reference(s):**

s. 1002.331

**Evaluation Criteria:**

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

- Evidence that the applicant’s school and the school to be replicated (if different) are designated by the Commissioner of Education as a High-Performing Charter School.
- Evidence that the proposed school will be substantially similar to the high-performing school that is being replicated. Reviewers should base this determination on the response to this question as well applicant’s proposed educational, organization, and business plans as described throughout the application.
- Evidence that the organization or individuals involved in the establishment and operation of the proposed school are significantly involved in the operation of the high-performing school that is being replicated.

<b>Meets the Standard</b>	<b>Partially Meets the Standard</b>	<b>Does Not Meet the Standard</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Strengths</b>		<b>Reference</b>
<b>Concerns and Additional Questions</b>		<b>Reference</b>

**Addendum B: Education Service Providers**

The ESP section should provide a rationale for contracting with the ESP, evidence of ESP success in operating high-quality charter schools, the capacity of the ESP to successfully operate this school, and evidence that the governing board and ESP are able to operate free from conflicts of interest.

**Statutory Reference(s):**

s. 1002.33(6)(a)

**Evaluation Criteria:**

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

- A clear explanation of the reasons for contracting with an education service provider and how and why the ESP was selected and a description of the due diligence employed to assess the capacity of the ESP.
- Sufficient evidence of the ESP’s previous academic, organizational, and financial success and capacity for future success that make it more likely than not that it will be successful with the proposed school.
- Evidence of the ESP’s organizational capacity to manage an additional school or schools as determined by its growth plan.
- A comprehensive list (Form IEPC-MIA) of all schools affiliated with the ESP and ensuing performance data used to support the selection of the ESP (past and current).
- Evidence of success working with similar populations to the target population. If there are deficiencies or lack of experience working with the target populations, then reviewers will look for a sufficient explanation of programmatic adjustments that will be made to ensure success with any new school(s).
- A clear delineation of the roles and responsibilities and decision-making authority of the school’s governing board and the ESP, structured to ensure a clearly defined arm’s-length, performance-based relationship that is free from conflicts of interest. This includes evidence that the school’s governing board has a clear plan for holding the ESP accountable for negotiated performance.
- A clear delineation of the term of the management agreement, the conditions, grounds and procedures by which the agreement may be renewed and terminated, and a plan for continued operation of the school in the event of termination.
- A draft of the proposed contract with all key terms included.

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

<b>Concerns and Additional Questions</b>	<b>Reference</b>

**Applicant History Worksheets (Form IEPC-M1A)**

The Applicant History Worksheets should provide information regarding the track record of the applicant, the applicant’s governing board, and if applicable, the applicant’s ESP with regard to the operation of other charter schools. The sponsor should review the entire portfolio of charter schools of the foregoing entities when evaluating performance. The academic and financial performance of the portfolio should be considered in the decision to approve or deny the application.

**Statutory Reference(s):**

s. 1002.33(6)(a)

**Evaluation Criteria:**

A sponsor should review the portfolio of schools operated by the applicant group, governing board, or ESP to determine if the academic and financial performance demonstrates the capacity to operate a high-quality charter school.

<b>Strengths</b>	<b>Reference</b>
<b>Concerns and Additional Questions</b>	<b>Reference</b>