

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.

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**OVERALL ASSESSMENT – COMPLETE THIS SECTION LAST**

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

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

**2023 Navigator Academy of Leadership High School Davenport Final Edited 6/13/23**

Name of Person Completing Assessment: \_\_\_\_\_ Date:  
\_\_\_\_\_

Title: \_\_\_\_\_

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

Rule 6A-6.0786  
Form IEPC-V2  
Effective December 2019

**Charter Application Review Team Recommendation**

<b>Review Team Results*</b>	<b>Approve</b>	<b>Deny</b>
	3	12

\*Participants who were unable to make a recommendation at the 5/27/2023 meeting were provided a link to make their recommendation which is reflected in the total count.

**The School is proposing to open in the 2024-2025 school year.**

**Student Projections**

<b>School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
Year 1	9 - 10	250
Year 2	9 - 11	375
Year 3	9 - 12	500
Year 3	9 - 12	625
Year 5	9 - 12	650

**Participants in Capacity Interview Conducted on May 16, 2023**

Manuel Delgado, Board Chair

Jeremy Calkins, Compass Charter Schools, LLC, Managing Principal

Diane LaFrance, Compass Charter Schools, LLC, Vice President of Academics and Operations

**EVALUATION SUMMARY**

	<b>DOE Application Question</b>	<b>Meets Standard</b>	<b>Partially Meets Standard</b>	<b>Does Not Meet Standard</b>
<b>1.</b>	Mission, Guiding Principles and Purpose	X		
<b>2.</b>	Target Population and Student Body		X	
<b>3.</b>	Educational Program Design	X		
<b>4.</b>	Curriculum and Instructional Design	X		
<b>5.</b>	Student Performance		X	
<b>6.</b>	Exceptional Students		X	
<b>7.</b>	English Language Learners		X	
<b>8.</b>	School Culture and Discipline	X		
<b>9.</b>	Supplemental Programming	Not Applicable		
<b>10.</b>	Governance		X	
<b>11.</b>	Management & Staffing			X
<b>12.</b>	Human Resources and Employment	X		
<b>13.</b>	Professional Development	X		
<b>14.</b>	Student Recruitment and Enrollment	X		
<b>15.</b>	Parent and Community Involvement	X		
<b>16.</b>	Facilities		X	
<b>17.</b>	Transportation Service			X
<b>18.</b>	Food Service		X	
<b>19.</b>	School Safety & Security		X	
<b>20.</b>	Budget			X
<b>21.</b>	Financial Management and Oversight	X		
<b>22.</b>	Start-Up Plan	X		
<b>A</b>	Replications	Not Applicable		
<b>A1</b>	High Performing Replications	Not Applicable		
<b>B</b>	Education Service Provider	X		
	Applicant History Worksheets	Provided by Applicant		

**General**

<b>Interview Question:</b>
<ol style="list-style-type: none"><li>1. A review of the Navigator Academy of Leadership K-8 Student/Parent Handbook reflects that students must have a “C” average or better for the current quarter in order to participate in a field excursion (field trip).<ol style="list-style-type: none"><li>a. Please provide additional information to provide context for this policy.</li><li>b. Will the high school implement this policy, as well?</li><li>c. How will you ensure that this policy does not discriminate against students with special needs?</li></ol></li></ol>
<b>Applicant’s Response</b>
<ol style="list-style-type: none"><li>a. Ms. LaFrance explains, “Excellent. Well, it's a great question and it is something that we are currently looking at. It will be addressed at our retreat this summer. So, we're looking at changing this policy. So, I do not believe that we will have this in place at the high school. Each year, we reevaluate the handbooks, and while it's written in the handbook, it's currently not being followed at our Navigator Academy of Leadership Davenport that they're not using the grade for a field excursion. So, it is something that we're looking at removing for both our elementary and our high school.”</li><li>b. Ms. Amato does not ask this question.</li></ol>



**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 type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant explains, “The NEW and unique design of the facility will allow for teacher collaboration.”</li> </ul>	Page 11
<ul style="list-style-type: none"> <li>• The applicant articulates, “Science and Math classrooms will facilitate an exploratory-lab model through the use of functional furniture and additional square footage. Lab spaces will facilitate biweekly collaborative vertical planning meetings with teachers as well as department meetings by subject area.”</li> </ul>	Page 11
<ul style="list-style-type: none"> <li>• The applicant specifies that the School will be located on vacant land located on the campus of the current Navigator Academy of Leadership K-8 Davenport campus on 495 Holly Hill Road.</li> </ul>	Page 12
<ul style="list-style-type: none"> <li>• The applicant specifies, “Enrollment projections were created to promote gradual growth over a 5-year span. Each year we will increase enrollment in a way that is both reasonable and attainable while developing and maintaining a waitlist. Student counts which maintained class size averages were considered.”</li> </ul>	Page 12

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>• The application includes a chart consisting of targeted demographic data for the Navigator K-8 charter school and neighboring areas. The chart stipulates that the existing Navigator Academy of Leadership Davenport K-8 school has sixteen percent (16%) of students receiving</li> </ul>	Page 11

<p>Free/Reduced Lunch. The applicant shares, “To gather targeted demographic data for our intended high school site, we researched Ridge Community High School, nearby Middle Schools, and NAL-002 since we anticipate that most of our population will come from the NAL-002 campus and the neighboring schools as referenced below.”</p> <ul style="list-style-type: none"> <li>○ The applicant indicates, “Since NAL-003 will abide by the enrollment above polices and parameters, we cannot anticipate what our exact student population will look like. However, we anticipate that the student population may mirror that of NAL - 002.”</li> <li>○ Yet, the applicant is projecting that the proposed high school will have fifty-seven percent (57%) of its students on Free/Reduced Lunch. <b>REPEATED CONCERN</b></li> <li>○ It is unclear as to why there is a significant increase in the percentage of students receiving Free/Reduced Lunch, particularly at the high school level.</li> </ul> <ul style="list-style-type: none"> <li>● The District is unable to validate the demographic data presented in the chart for surrounding schools.</li> <li>● The applicant numbered the questions incorrectly for this section.</li> </ul>	<p>Page 10</p> <p>Page 10</p> <p>Page 11</p> <p>Pages 10 - 13</p>
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<p><b>Interview Question:</b></p>	
<p>1. You state on page ten (10) of the charter application, “Since NAL-003 will abide by the enrollment above polices and parameters, we cannot anticipate what our exact student population will look like. However, we anticipate that the student population may mirror that of NAL-002..” The chart on page eleven (11) of the charter application reflects Navigator Academy of Leadership Davenport K-8 has sixteen percent (16%) of its students on free/reduced lunch.</p> <ul style="list-style-type: none"> <li>a. You indicate in the chart on page ten (10) of the charter application that the proposed high school will have fifty-seven percent (57%) of its students on free/reduced lunch. Please explain why there is a significant increase in the percentage of students receiving free/reduced lunch at the high school level.</li> </ul>	
<p><b>Applicant’s Response</b></p>	
<ul style="list-style-type: none"> <li>a. Ms. LaFrance replies, “Great. Thank you for pointing that out, because sadly that is just an error there. If you look on page ten (10) on the paragraph that starts with since NAL-003, we do say that 002 currently has sixty percent (60%) free and reduced lunch. So, that's where the number of fifty-seven percent (57%) came from the high school. So, it does align with what we currently have at our elementary school. So, unfortunately on page eleven (11) that was an error that was typed in there. So, we're gonna go by that first paragraph that states that sixty percent (60%) free and reduced lunch, which is what we currently have now.”</li> </ul>	



Ms. Amato asks the applicant if the School is considering becoming a Community Eligibility program since surrounding schools offer all students free breakfast and lunch. Ms. LaFrance responds, “Well, that’s definitely something that we can look into.”

**Notes:**

1. The paragraph and chart found on page ten (10) of the application and referenced by Ms. LaFrance includes the following:

*Since NAL-003 will abide by the enrollment above policies and parameters, we cannot anticipate what our exact student population will look like. However, we anticipate that the student population may mirror that of NAL-002. In gathering data on the demographics for the projected high school site, the numbers below indicate that the majority of our student population may be White and Hispanic (about 79%) and about 60% free and reduced lunch. Approximately 12% of the student population will be ELL.^^*

Demographics	White	Black	Hispanic	ESE	FRL	ELL
Navigator Academy of Leadership High School	22%	7%	57%	12%	57%	12%

2. The identified paragraph clearly references the demographics researched for the projected high school site. The sixty percent (60%) merely reflects the percentage of anticipated high school students receiving free/reduced lunch, as illustrated in the chart below the paragraph.
3. The Florida Department of Education 2022-23 Final Survey 2 Lunch Status by LEA (for Federal Funding) indicates that Navigator Academy of Leadership Davenport K-8 (NAL-002) has thirty-seven percent (37%) of its students on free/reduced lunch. (Actual figure – 37.3%). Please refer to the link below for verification.

**[Lunch Status by School, Survey 2, 2022-23](#)**

4. Consequently, the percentage of free/reduced students at the current Navigator K-8 school does not align with the percent of free/reduced students at the proposed high school as stated by the applicant during the capacity interview.

**Interview Question:**

2. A review of the Navigator Academy March 29, 2023 Board Meeting Agenda Minutes (02) reflects the following:  
*Consent Agenda: ii. Authorization for Compass to submit application for a 375 student High School (003) at the Davenport Campus.*

The enrollment projections chart on page twelve (12) of the charter application illustrates the following student enrollment:  
 Year 1 – 250 Students  
 Year 2 - 375 Students  
 Year 3 – 500 Students

Year 4 – 625 Students  
Year 5 – 650 Students

- a. Please explain why the Navigator Academy Board approved a high school application for 375 students.

**Applicant's Response**

- a. Mr. Calkins explains, "There was just a scrivener's error. So, they were giving the projection as you see it right now. So, it just wasn't caught in the minutes."

Ms. Amato asks, "So, will that be corrected in the April board minutes?"

Mr. Calkins replies, "It, it will be corrected." Mr. Calkins affirms that the District will be provided updated minutes when the correction is made.

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
<ul style="list-style-type: none"> <li>• The applicant explains, “NAL-003 will provide a well-rounded educational experience with programs and areas of instruction grounded in science, mathematics, art, reading, and technology (SMART).”</li> <li>• The applicant articulates, “Our SMART (Science, Mathematics, Art, Reading, and Technology) instructional focus will be delivered through immersive and engaging lessons, labs, webinars, interviews, and excursions. Our SMART curriculum will provide a well-rounded educational experience and will include studies to develop skills in the areas of communications, Business, and STEM/Engineering and Robotics.”</li> <li>• The applicant shares, “...what will make NAL-003 stand out as a unique charter school is our character education program with a specific focus in developing leadership skills. Modeled after Stephen Covey’s <i>7 Habits of Highly Effective People</i>, NAL-003 will develop advanced leadership skills incorporating the 7 Habits of Highly Effective People and</li> </ul>	<p>Page 14</p> <p>Page 14</p> <p>Page 15</p>

<p>through the effective implementation of a sequential curriculum using:</p> <ul style="list-style-type: none"> <li>• <i>The 7 Habits of Highly Effective Teens: Leading Your Life</i></li> <li>• <i>Take Charge: The Leader in Me Program</i>:</li> <li>• <i>College Readiness 3. Find Your Voice: Career Readiness</i></li> <li>• <i>Inspire Others: Leadership Readiness</i>”</li> </ul> <ul style="list-style-type: none"> <li>• The applicant states, “Our learning environment will be mainly classroom-based with a student-centered and /or interactive lab approach.”</li> <li>• The applicant explains, “Classrooms will have technology supported resources through the use of interactive whiteboards and mobile labs. Technology that is readily available and easy to use will facilitate any lessons relying on some form of blended-learning.”</li> <li>• The applicant articulates, “Overall, the research clearly shows that stem education is an important component of a well-rounded education and provides numerous benefits for students. By providing students with opportunities to engage in hands-on, real-world experiences in science, technology, engineering, and mathematics, we can help prepare students for the challenges and opportunities of the future.”</li> <li>• The applicant clarifies that the school will operate annually for 180 school days and will follow the Polk County Public School’s calendar with regards to the starting and ending dates of the school year, observed holidays, teacher work days, and school vacation days.</li> </ul>	<p>Page 15</p> <p>Page 16</p> <p>Page 17</p> <p>Page 19</p>
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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
<ul style="list-style-type: none"> <li>• The applicant states, “NAL-003 will provide a student-led and innovative model of instruction across all disciplines to develop SMART students. SMART students are well-rounded in the Sciences, Mathematics, Arts, Reading (Literature) while being Technologically savvy.”</li> </ul>	Page 22
<ul style="list-style-type: none"> <li>• The applicant articulates, “NAL-003 will provide quality instruction, high expectations, and consistent standards-based instruction for all students. The content will be challenging and based on the philosophy that all students can achieve high standards when given stimulating opportunities that are grounded and supported through relevant and differentiated instructional approaches.”</li> </ul>	Page 22
<ul style="list-style-type: none"> <li>• The applicant explains, “At this time, we have some ideas of the basic elective courses that we want to offer. Additional research is needed to finalize which elective courses will be offered and the Instructional Focus Guides (IFG) for each. Example of some of these include but are not limited to Forensic Science, Journalism, TV Broadcasting, Accounting, Business Law and Business Management, etc. This will be done by surveying our 8<sup>th</sup> grade population at NAL-002 and all incoming 9<sup>th</sup> graders to see their interests as well as the electives that best complement our educational focus.”</li> </ul>	Page 28

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<ul style="list-style-type: none"> <li>• The applicant shares, “With the current information in hand, NAL-003 is looking at adopting some supplements to our Science, Engineering and overall STEM focus such as intends to adopt Project Lead the Way (PLTW) and WOZ ed pathways as it facilitates a more engaging and hands-on classroom environment that empowers students to develop the in-demand knowledge and skills they need to thrive through engaging real-world lessons.”</li> </ul>	Page 30
<ul style="list-style-type: none"> <li>• The applicant indicates, “NASA Engineering and Aerospace are supplemental components in the educational program at NAL-003 that helps further develop STEM initiatives. Concepts in aviation and aerospace are grounded in engineering and physics as well as Math and Science.”</li> </ul>	Page 34

<b>Concerns and Additional Questions</b>	<b>Reference</b>
<ul style="list-style-type: none"> <li>• The District has reservations regarding appropriate staffing and sufficient funding to support the proposed unique and innovative curriculum.</li> </ul>	Pages 22 – 36
<ul style="list-style-type: none"> <li>• The applicant shares, “For a detailed picture of the curriculum, please see <b>Attachment D.</b>” <ul style="list-style-type: none"> <li>○ A review of Attachment D reflects information supporting the reading curriculum.</li> </ul> </li> </ul>	Page 26 Attachment D
<ul style="list-style-type: none"> <li>• The applicant stipulates that it will adopt envision, which is aligned to the Math BEST Standards. <ul style="list-style-type: none"> <li>○ However, the Scope and Sequence material includes outdated benchmarks.</li> </ul> </li> </ul>	Page 27 Attachment C
<ul style="list-style-type: none"> <li>• The applicant includes Journalism benchmarks that are aligned to Common Core, not BEST standards.</li> </ul>	Attachment C

**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 type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant demonstrates an understanding of academic accountability provisions and goals mandated by the state.</li> <li>• The applicant states it will follow Polk County’s Pupil Progression Plan.</li> <li>• The applicant affirms, “Each year, students will meet with their guidance counselor in order to evaluate their progress in satisfying their requirements for graduation. This is done at the end of the year when subject selections are completed for the following year, and is revisited at the beginning of each school year to ensure students are placed in the appropriate courses. The guidance counselor will review the progress of their assigned students quarterly so that we can intervene with any student who may not meet requirements in order to earn the credits needed. This is critical as it may</li> </ul>	<p>Page 37 – 39</p> <p>Page 41</p> <p>Page 41</p>

<p>affect their ability to meet their graduation requirements with their cohorts.”</p> <ul style="list-style-type: none"> <li>• The applicant explains, “If at any time, the data from the assessments demonstrate that we are off target in meeting our educational goals, the administrative team along with instructional leaders will complete a SWOT (Strength, Weakness, Opportunities, Threats) analysis in order to identify what is the cause; curriculum, instruction lack of time insufficient resources, etc.”</li> </ul>	<p>Page 45</p>
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<b>Concerns and Additional Questions</b>	<b>Reference</b>
<ul style="list-style-type: none"> <li>• The applicant numbered the questions incorrectly for this section.</li> </ul>	<p>Page 47</p>
<ul style="list-style-type: none"> <li>• The applicant shares, “NAL-003 intends to offer an entire spectrum of classroom and curriculum courses that will include advanced classes, advanced placement (AP) courses and dual enrollment, industry certification aligned courses in order to assist with acceleration, as well as regular core coursework with built in differentiation, interventions, pull-outs and resource as needed.”</li> </ul>	<p>Page 40</p>
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>○ The applicant fails to provide information and/or documentation regarding its plan to partner with a local college to provide dual enrollment.</li> </ul> </li> </ul>	<p>Page 40</p>
<ul style="list-style-type: none"> <li>• The applicant provides an inappropriate response to question G, which requires the applicant to identify, in addition to all mandatory assessments, the primary interim assessments the School will use to assess student learning needs and progress throughout the year (including baseline assessments) and a proposed assessment schedule as Attachment F. The question also requires the applicant to 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.             <ul style="list-style-type: none"> <li>○ This is a requisite of the Model Florida Charter School Application, Rule 6A-6.0786, F.A.C., Form IEPC-M1, Effective November 2022.</li> </ul> </li> </ul>	<p>Page 42</p>



**6. Exceptional Students**

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

**Statutory Reference(s):**

s. 1002.33(16)(a)3.

**Evaluation Criteria:**

A response that meets the standard will present:

- 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 type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant states, “NAL-003 will not discriminate on the basis of race, religion, or national or ethnic origin, or exceptionality in the admission of students. Any eligible student who submits a timely application shall be considered, unless the number of applications exceeds the capacity of the program, class, grade level, or building.”</li> </ul>	Page 48
<ul style="list-style-type: none"> <li>• The applicant specifies, “In addition, NAL-003 will collaborate with Polk County Public Schools to ensure that we are following all procedures for enrolling and effectively servicing students with disabilities.”</li> </ul>	Page 48
<ul style="list-style-type: none"> <li>• The applicant explains, “NAL-003 hereby agrees to adopt and implement the Polk County Public Schools’ policies and</li> </ul>	Page 48

procedures with respect to the Special Education, as amended from time to time.”	
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<b>Concerns and Additional Questions</b>	<b>Reference</b>
<ul style="list-style-type: none"> <li>• The applicant shares, “NAL-003 anticipates the projected population of Students with Disabilities (SWD) to be approximately 12%. The FLDOE reported that approximately 14% of students in the State of Florida are SWD based on 2020-2021 Fall data. The same report from the FLDOE has 14% of students in Polk County are SWD and 11.9% of students in the neighboring high school (Ridge Community High School) is a SWD. NAL-003 anticipates that most students would come from Polk County. Therefore, it is accurate to estimate that approximately 12% of our population may be SWD.”             <ul style="list-style-type: none"> <li>○ The applicant does not provide current data, utilizing 2020 – 2021 Fall data.</li> </ul> </li> <li>• The applicant numbered a question incorrectly for this section.</li> <li>• The applicant inadvertently includes a response for question G in Section 5, Student Performance.</li> <li>• The estimated twelve percent (12%) of the student population for ESE in the first year of operation will equate to thirty (30) students. The School plans to hire 0.5 ESE teacher.             <ul style="list-style-type: none"> <li>○ This represents a very large caseload for a part-time ESE teacher to provide direct services.</li> <li>○ In addition to providing direct services, the teacher is also responsible for preparing and facilitating all IEP and 504 meetings, monitoring and implementing stipulated goals and expectations, ensuring all legal requirements are fulfilled, etc.</li> </ul> </li> <li>• The applicant explains, “Navigator Academy of Leadership High School’s teaching staff will begin with one certified ESE teacher that can act as both the specialist to maintain the ESE program paperwork and provide direct services. Since the first year we will have a smaller enrollment, this ESE teacher will also oversee the gifted EP students.”             <ul style="list-style-type: none"> <li>○ Contrary to the statement above, the School is allocating 0.5 ESE teacher for the first year of operation.</li> </ul> </li> </ul>	<p>Page 48</p> <p>Page 53</p> <p>Page 42</p> <p>Pages 48 and 82</p> <p>Page 57</p> <p>Page 82</p>

**Interview Question:**

1. Please note that the response for Question G for Section 6: Exceptional Students can be found on page forty-two (42) (Section 5: Student Performance) of the charter application.

You state on page forty-two (42) of the charter application, “If it is determined that the student’s needs cannot be met in the general education classroom, the team will consider a separate classroom as an option.”

- a. Is the School proposing to have a separate resource room for exceptional students that have identified needs that cannot be met in the general education classroom?
- b. How will you modify the staffing plan to accommodate a separate classroom, if applicable?

**Applicant’s Response**

- a. Ms. LaFrance shares, “Great. Well, as you know, when we're working with exceptional students, our goal is to keep a student in the least restrictive environment. So, we're gonna look at what's best for the students. Umm, so, some things that we'll look at is based on their MTSS or RTI where they should be placed. Then we will look at our staffing to see what we can possibly provide and we'll work hand in hand with the, the Board and with Polk County to figure out exactly what the best, the best route forward is for that child.”
- b. Ms. LaFrance replies, “Right. That's something that we would have to look at and we would have to look and see if we have that available based on our staffing plan.”

Ms. Amato seeks clarification regarding what actions the School will take if the School does not have the staff.

Ms. LaFrance answers, “Well, we'll, we'll continue again to look and see if it could be modified and changed. Again, our, our interest is what will be best for that student.”

**Notes:**

1. It is unclear as to why the applicant includes the statement, “If it is determined that the student’s needs cannot be met in the general education classroom, the team will consider a separate classroom as an option.” It does not appear that it is an option based on the response given by applicant at the capacity interview conducted on May 16, 2023.
2. It is important to note that under IDEA, special education services depend on the needs of the student, not money. In fact, the U.S. Department of Education explains that even if a school has budget concerns, that does not change its legal obligations for a child.

**Interview Question:**

2. Also on page forty-two (42) of the charter application, “Once the IEP is developed, the school will work with the district to provide the necessary services and accommodations to the student, either within the general education classroom or in a separate classroom, as determined by the IEP team.”
  - a. Please elaborate on the types of services you plan to provide at Navigator Academy of Leadership High School for Exceptional Students.
  - b. Will these services be contracted and/or provided by school staff?

c. Please indicate the funding source for such services in the proposed budget found in Attachment X of the charter application.

**Applicant’s Response**

- a. Ms. LaFrance maintains, “Well, like I think the first thing we have to find out is what is needed. So, currently we offer speech and language. These are all contracted out. Umm, so, based on what the needs of the student is, is what we will be able to offer and what we could offer. I do see speech and language being something that we most likely will be offering, umm, just based on the population we currently have at Davenport School right now.”
- b. Ms. LaFrance confirms that most of the services offered will be contracted services.
- c. Mr. Calkins stipulates, “Yeah, I’m looking at it 6100 right now. But on the health services, OK, so it’s 6130, is the line item.”

Ms. Amato confirms that \$19,275 is allocated for line item 6130 – Health Services in year one (1).

Ms. Amato asks what expenses, other than Speech Services, will be paid from line item 6130.

Mr. Calkins explains that the proposed high school is sharing a nurse with Navigator Academy of Leadership. He confirms that the line item 6130 will be used for the 0.5 Nurse position, as well as, speech services. Furthermore, Mr. Calkins explains that the high school will be sharing the nurse with the middle school for the first year of operation.

Ms. Amato replies, “All right. So, I will tell you that gives some pause because obviously a population, you may potentially have more than just speech and language. You may have OT, PT. So, those are just other additional, just things to be considerate of and mindful of when you’re working on your budget.”

**Notes:**

1. The staffing plan found on page eighty-two (82) of the charter application reflects the following:

	Year 1	Year 2	Year 3	Year 4	Year 5
Nurse	.5	.5	.5	1	1

2. The District has reservations regarding the Speech and Language being the only potential contracted services budgeted by the School.
3. Moreover, Function 6130 includes an allocation of \$19,275 for a 0.5 Nurse, Contracted Speech Services and a Mental Health Counselor. This is not an appropriate allocation for obvious reasons.

**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.

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

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant shares, “The mission of the English for Speakers of Other Languages (ESOL) program at Navigator Academy of Leadership is to successfully prepare and assimilate students whose first language is a language other than English so that they may develop into bilingual, bi-literate and multicultural citizens of their community.”</li> </ul>	Page 60

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>• The applicant fails to allocate appropriate staffing to support ESOL services for its projected student population.</li> </ul>	Page 60 - 63

Interview Question:
1. The staffing plan found on page eighty-two (82) of the charter application depicts a 0.5 ESOL allocation for an ESOL Teacher. Considering your projected population, please explain why you feel you can effectively serve English Language Learners with this allocation.
Applicant’s Response

1. Ms. LaFrance states, “Umm, for this one we were just estimating based on for the first year sharing our ESOL teacher with our Davenport school. Again, it's all going to depend on the actual numbers and the students that come in. Obviously that could be changed if our ESOL population needs more service than what we currently have with sharing between both schools.”

Ms. Amato responds, “So, can you, and I know the K-8 is not on, obviously that's not what we're questioning, but this does, the K-8 currently have a full a full unit for ELL?”

Ms. LaFrance answers, “Yes, they do. And we also have. So, we have a full time teacher and we also have paras that assist with that.”

Ms. Amato shares, “So, by splitting a one (1). So, if the K-8 population currently already has one (1) full teaching unit addressed to serve the ELL population. By splitting that teacher, you are now taking away services from the K-8 program.”

Ms. LaFrance explains, “Right. So, I think what we had intended was for our Davenport school to add to their, to try to have the same person over both for that continuity. But we were going to add to our elementary Davenport school another person over there to help with that. So, we would not lose any services at that school at all. We just initially wanted that one person to do both, so we can see, you know, for the continuity of the students because we're hoping that they'll come from us to the high school.”

Ms. Amato summarizes the applicant’s response by saying, “So, if I'm understanding you correctly, you're looking at the K-8 program to adding a second full time, full unit. So, you would have two (2) full ELL units allocated at the K-8 program along with your paras, but one (1) of those full time ELL units would really be one half (1/2) a unit, so one and one half (1 ½) would serve the ELL population at the K-8 program and a half (1/2) a unit would serve the ELL population at the high school.”

Ms. LaFrance affirms, “Yeah, based right now, but again, that could definitely change based on our numbers, yes.”

**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
<ul style="list-style-type: none"> <li>• The applicant shares, “Incorporating strategies from <i>The Leader in Me</i> and the <i>7 Habits of Highly Effective Teen and People</i>, will allow NAL-003 to have a positive approach to discipline by first focusing on creating a culture of leadership for students and educators alike.”</li> <li>• The applicant stipulates, “To fully develop our educational program and school culture, NAL-003 will follow the District’s Code of Student Conduct and the Board approved Code of Collegiality that will establish guidelines for model student behavior.”</li> <li>• The applicant states, “Aside from the focus on implementing the 7 Habits, our students work on a 4-year culminating Senior project that integrates what they have learned with the leadership skills they have refined.”</li> </ul>	<p>Page 64</p> <p>Page 66 Attachment G</p> <p>Page 66</p>

Concerns and Additional Questions	Reference





Ms. Amato seeks clarification regarding the allocated funds for this line item.

Mr. Calkins replies, “So, in the first year it's \$15,000; second year, it's 30; third year, it's 35. It just keeps going up.”

Ms. Amato asks, “And then do you, does your Board already have an approved stipend policy or you going to mirror what Polk County Public Schools offers as a stipend?”

Ms. LaFrance states, “Right now we do have one for our Davenport school that we just put in place this year. So, we're going to be looking at that ,our at our retreat to see if we will continue with that or if we're going to move to what Polk County is doing. Schools offers as? So that's another line item for us for the summer.”

Ms. Amato shares, “Just so you know, as a side note, those are negotiated with the teachers union and the district, so obviously we offer a ton of sports and ton of different activities and clubs. So you at least have something you could potentially model from if you needed it.”

**Interview Question:**

2. On page seventy (70) of the charter application you stipulate, “A sports program including participation in select FHSAA sports also enhances the high school culture, experience, and academics as our students are expected to be scholar athletes.”
- a. Please share what FHSAA sports you are anticipating to offer at the high school.
  - b. Please share the line item in the proposed budget for the identified FHSAA sports.

**Applicant’s Response**

- a. The applicant replies, “Well, that's a great question. I don't think we have our complete answer on that yet until we survey our students to see, but we're possibly looking at soccer, possibly basketball.” Mr. Calkins adds, “Those are the facilities that we’re building... Potentially baseball.”

Ms. Amato asks a clarifying question, “And where would you anticipate playing your home games?”

Mr. Calkins answers, “Yeah, the gym is going to be regulation size gym and we will have a regulation size field, as well.”

Ms. Amato asks about where baseball will be played.

Mr. Calkins states, “It's, and that's (inaudible), potentially baseball. I gotta verify that's a regulation size field, but I believe that it is the last time I spoke with the engineer.”

Ms. Amato offers, “And then I would just be mindful, for example, if you are offering baseball, you might want to consider softball because you also need to be, make sure that you are in compliance with equitable sports for boys and girls.” She also says, “Doesn't necessarily have to be softball. It could be another sport targeted for females,

but if you're offering baseball, then it just seems natural that it could potentially be softball.”

- b. Mr. Calkins explains, “So, insurance is under 5100-320. Umm, the other sports, a lot of it’s going to be through fundraising.” He identifies line item 3495 for fundraising. Mr. Calkins says, “...and we'll probably have to increase that a little bit. And when we do get to the budget section like you were saying, Candy, in an effort to try to be fluid, you're gonna see when we get there, how we freed up a lot of space in our budget.”

Ms. Amato asks for some insight as to how the applicant envisions fundraising for the sports program.

Ms. LaFrance specifies, “Well, I think it's going to go right along with our Leader in Me program that puts the student in charge and being the, the leader. So, that group will decide how they will fundraise. I see possibilities of, you know, doing a thrift sale, car washes, but we wanted to come from the students on how they see it best being done because they are the ones that are going to be, you know, doing it. So, it's just another way for Leader in Me, for them to show (inaudible) of being a leader at our schools.”

**Interview Question:**

3. The staffing plan on page eighty-two (82) of the charter application includes the allocations highlighted below. It is important to note that these allocations have been drastically reduced from the previously submitted charter application. Please see allocations in parenthesis for the charter application you submitted previously.
- a. You state on page seventy (70) of the charter application, “Stipends will be paid to Coaches based on sport and level, i.e. JV or Varsity.” Can you please identify the line item for the coaching and athletic director stipends?
  - b. Please explain why the number of coaches is drastically reduced from the previously submitted charter application.
  - c. The School proposes to serve students in grades nine (9) through eleven (11) in the first two (2) years of operation. Should the Charter Review Team assume there will be no varsity sports for the initial two (2) years of operation for these students?

**Applicant’s Response**

- The applicant shares, “So it's gonna be 5100 - Salaries. It's coming from the salaries.”

Ms. Amato affirms, “So the activities and club sponsors are paid out of the 9130 and your coach, your coaches’ stipends are paid out of salary.”

Ms. Amato asks clarifying questions, “So, you don't and you said you are in the summer, you will workshop those items with those stipends will look like. Correct? Because obviously you don't currently have a JV or varsity stipend, salary schedule. Correct?”

Both Mr. Calkins and Ms. LaFrance respond, “Correct.”

- Mr. Calkins shares, “I think what we did is we took a look at some existing charter schools that we knew offered these services and we modeled. We went back to the spreadsheet and we tried to copy what we saw they were doing.”

Ms. Amato states, “So, I guess my question is, is for a JV coach, if you plan to offer soccer, basketball and baseball, would it not be mathematically that you would need at least three (3) JV coaches for year one (1)?”

Mr. Calkins replies, “Not necessarily, because someone we find that one (1) coach, he'll do multiple sports. So you might not need, you know, just as long as there's not overlap. But I know that at Bell Creek when I was there that you had a coach who did a couple different sports, so, just to be in season, so some of these don't overlap.”

Ms. Amato says, “No, no, I get that the seasons might not overlap, but when you said soccer and basketball, I'm assuming that that meant two (2) teams, a girls JV soccer team and a boys JV soccer team. I assume that that meant a girls JV basketball team and a boys JV basketball team. Let's not talk about baseball, because that's obviously still pending. So, that right there you would need potentially at least two (2) coaches if they weren't, they were going to coach both sports.”

Mr. Calkin answers, “Correct. We may have to make an adjustment.”

Ms. Amato also shares, “And if the and I'm, I don't I know, basketball is in the, in the winter and soccer normally wraps up, so there may be slight overlap with tryouts and, and so those, that might be something to look into. So, your JV coaches would then have to be increased to at least four (4) potentially. I'm guessing. I don't know, I'm just, I'm asking.”

Mr. Calkins responds, “Potentially. We agree.”

- Ms. LaFrance states, “Right. We were looking at having just the JV team when we first started up and then as we add more grades, we would go to the varsity teams being offered also.”

Ms. Amato clarifies, “So then again, your varsity coach numbers would have to be adjusted, as well.”

Ms. LaFrance says, “Absolutely.”

Ms. Amato says, “And then speaking from and, this might be later, but while we're talking about sports at the moment. So, you don't have an athletic director for year one (1) and I know it's JV, but who will be responsible for ensuring that the students are in compliance with FHA guidelines and eligibility?”

Ms. LaFrance replies, “Well, we were hoping that we would have the coach do that for the first year and then as we grow bigger, you can see that we, year four (4), we have

that athletic director come on. But I, I think we don't know until we see what we're offering to see if that's feasible for one (1) coach to be able to do that and coach the team.”

Ms. Amato expresses, “And so, I will tell you, it does give pause for our head athletic director for there not to be somebody, especially that first year you're offering varsity. There's a lot behind eligibility. I'm not saying one (1) person couldn't do it, but just be mindful. FHSAA has very strict policies, rules, and guidelines. So, obviously you're one (1), not a bigger deal with, you know, with two (2) sports, potentially four (4) teams. But just something to be mindful of as your program grows.”

Ms. LaFrance responds, “Absolutely. It is something we can look at adjusting.”

Mr. Calkins shares, “You have our, because we've got an AD in your (inaudible). Just our, our projection. I'm just looking at varsity be 11th and 12th, we obviously we get there. So, just we're just talking along those lines, Candy, I'm just thinking about when it would be even feasible for us to offer varsity. It would be closer to the years four (4) and five (5) where we have, uh, uh, those grades, eleventh (11<sup>th</sup>) and twelfth (12<sup>th</sup>) because that's typically the people that participate in it, the varsity level. Since I think we do have the allocation for an athletic director in your four (4), so when we would get closer to that, that time where we would be offering or any sports.”

	Year 1	Year 2	Year 3	Year 4	Year 5
JV Coaches	1 (4)	1 (4)	1 (4)	1 (4)	1 (4)
Varsity Coaches	0 (0)	0 (0)	1 (2)	1 (3)	1 (4)
Athletic Director	0 (0)	0 (1)	0 (1)	1 (1)	1 (1)

**Notes:**

- a. In accordance with the enrollment projections provided on page twelve (12) of the charter application, the School will include students in grades nine (9) through twelve (12) in the third (3<sup>rd</sup>) year of operation.

The staffing plan found on page eighty-two (82) of the charter application demonstrates that the School will hire an Athletic Director in year four (4) of operation.

	Year 1	Year 2	Year 3	Year 4	Year 5
9	125	125	125	157	164
10	125	125	125	156	162
11	0	125	125	156	162
12	0	0	125	156	162
Total	250	375	500	625	650



<ul style="list-style-type: none"> <li>• The applicant stipulates, “The Governing Board of NAL-003 will appoint a representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes.”</li> </ul>	Page 76
<ul style="list-style-type: none"> <li>• The Sunbiz.org Division of Corporation filing for Navigator Academy of Leadership, Inc., includes the members below. This correlates to the information provided in the charter application.                     <ul style="list-style-type: none"> <li>○ Manuel Delgado (Chairman)</li> <li>○ Jesse Price (Vice Chairman)</li> <li>○ Paul Bello (Treasurer)</li> </ul> </li> </ul>	Page 75

<b>Concerns and Additional Questions</b>	<b>Reference</b>
<ul style="list-style-type: none"> <li>• The applicant provides inconsistent information regarding who is responsible for school operations.</li> </ul>	Page 71
<ul style="list-style-type: none"> <li>○ The applicant shares, “The ESP will ensure that the operations of the school (resources, courses, policies) are in accordance with the mission and vision of NAL-003 as adopted and approved by the Governing Board.”</li> </ul>	Page 71
<ul style="list-style-type: none"> <li>○ The applicant stipulates, “The school principal, hired by the Board, will be responsible for all aspects of the school operations, subject to the supervision of the ESP.” Moreover, the applicant asserts, “The faculty and staff of NAL-003 will report directly to the principal, who shall report to the Governing Board and the ESP.”</li> </ul>	Page 71
<ul style="list-style-type: none"> <li>○ However, the staffing plan does not support the hiring of a principal for any of the proposed five(5) years of operation. The staffing plan includes:</li> </ul>	Page 82
<ul style="list-style-type: none"> <li>▪ A .5 allocation for Director of Schools for all five (5) years of operation.</li> </ul>	Page 82
<ul style="list-style-type: none"> <li>• An Assistant Principal                     <ul style="list-style-type: none"> <li>○ Year 1 - .5</li> <li>○ Year 2 – 1</li> <li>○ Years 3 through 5 – 2</li> </ul> </li> </ul>	Page 82
<ul style="list-style-type: none"> <li>• The applicant states, “The ESP will make all school/based decisions, establishing and implementing procedures for the day-to-day operations.”                     <ul style="list-style-type: none"> <li>○ Generally speaking, the School administration is responsible for school based decisions.</li> </ul> </li> </ul>	Page 71
<ul style="list-style-type: none"> <li>• The applicant states, “The Board is currently composed of three members. Attachment L. The Board intends to add at least 2 members for a total of 5 members or add 4 members</li> </ul>	Page 72

<p>for a total of 7 members. The composition of the Board will always an odd number of members in order to facilitate votes and avoid ties.”</p> <ul style="list-style-type: none"> <li>○ This is similar language found in charter applications submitted by Navigator Academy on February 1, 2021 February 1, 2019 and August 1, 2017.</li> <li>○ Yet, the Board continues to have three (3) members to date and has not expanded its capacity.</li> </ul>	
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**Interview Question:**

1. You state on page seventy-two (72) of the charter application, “The Board is currently composed of three members. Attachment L. The Board intends to add at least 2 members for a total of 5 members. The composition of the Board will always have an odd number of members in order to facilitate votes and avoid ties.” Please note this is similar language found in previous charter applications submitted by Navigator Academy.
  - a. Please explain why the Board continues to have three (3) members to date and has not expanded its capacity as stipulated in numerous charter applications submitted to Polk County Public Schools.
  - b. Does the Board have any plans to expand in the near future? If yes, please provide a timeframe for such expansion.
  - c. If yes, will one (1) of the new Board members be from Polk County?

**Applicant’s Response**

- a. Mr. Delgado answers, “Good morning, ladies. My name is Manny Delgado. I’m the Board chair. And that’s an easy one to answer because we’re looking at quality, not quantity. And from our experience, the last year, year and a half, that becomes very crucial. We are very serious about our Board members makeup and we need to make sure that we are in there for the long run. So, we are looking at other candidates. Obviously, if I think we may invite someone to our summer conference and uh, we’re gonna vet them very deeply because of the experience we had recently in the last year and a half. We just need to make that for sure that they are the correct fit and they have the right people with the appropriate background. And we tend to look at people that benefit the schools in the long run. So, they have to be very qualified and that takes time. But we have no, there will be five (5) of five (5). But right now we’re operating extremely efficient, but we’re still continue to be looking for other board members.”
- b. Mr. Calkins shares, “So we’re inviting people every one of the things that we did. We made some changes to our comprehensive policy manual, manual due to some of the things that are transpired last year, as Mr. Delgado alluded to and one of the things there was making sure that we had a better vetting process for board members so we didn’t land where we landed a year ago. And so we are inviting people to our summer workshop so they get to see who we are and we get to see who they are. And then the board gets to decide then does it makes sense. Then obviously with three (3) members it only makes sense that we would add two (2) at a time. And so we

currently have one (1) that's shown interest and we have a couple other applications and I think we're gonna be reaching out to those folks as well.”

- c. Ms. Amato states, “And then just to reiterate, because I know these questions were posed at your presentation at the last work session. So, will one of and I know I believe Mr. Delgado already currently lives in Polk. So, will the new board members also be from Polk County or are you.”

Mr. Calkins responds, “Yeah, I think we actually have an application from a potential board member, Hillsborough called Pasco, three (3) applications that have seen.”

A discussion regarding Mr. Delgado’s residence in Polk County transpired.



**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 type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Strengths	Reference

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>• The staffing plan indicates that there will be ten (10) full time teachers.                             <ul style="list-style-type: none"> <li>○ The Navigator Academy of Leadership High School application submitted to the District the previous year includes twelve (12) full time teachers for the same expected student enrollment (250 students) for the first year of operation.</li> </ul> </li> <li>• The District has reservations regarding the 0.5 ESE Teacher and 0.5 ESOL Teacher allocations. It <u>does not</u> appear that these allocations are sufficient to effectively serve the proposed student population.</li> <li>• The School does not provide enough coaching allocations for the proposed sports (basketball, soccer, and possibly baseball).                             <ul style="list-style-type: none"> <li>○ One (1) JV Coach is allocated for each year of operation. Although one (1) person can coach</li> </ul> </li> </ul>	<p>Page 82</p> <p>Page 82</p> <p>Page 82</p> <p>Page 82</p>

<p>multiple sports, it is unclear how one (1) coach can offer boys and girls sports to ensure equity and compliance with Title 9.</p> <ul style="list-style-type: none"> <li>○ The applicant does not allocate a varsity coach until year three (3) of operation. The School allocates only one (1) varsity coach for years three (3) through five (5). <ul style="list-style-type: none"> <li>▪ Subsequently, an eleventh (11<sup>th</sup>) grade student enrolled in the School in the second year of operation does not have an opportunity to play a varsity sport until he/she is a Senior.</li> </ul> </li> </ul>	<p>Page 82</p> <p>Page 12</p>																																				
<table border="1" data-bbox="349 630 990 892"> <thead> <tr> <th></th> <th>Year 1</th> <th>Year 2</th> <th>Year 3</th> <th>Year 4</th> <th>Year 5</th> </tr> </thead> <tbody> <tr> <td>9</td> <td>125</td> <td>125</td> <td>125</td> <td>157</td> <td>164</td> </tr> <tr> <td>10</td> <td>125</td> <td>125</td> <td>125</td> <td>156</td> <td>162</td> </tr> <tr> <td>11</td> <td>0</td> <td>125</td> <td>125</td> <td>156</td> <td>162</td> </tr> <tr> <td>12</td> <td>0</td> <td>0</td> <td>125</td> <td>156</td> <td>162</td> </tr> <tr> <td>Total</td> <td>250</td> <td>375</td> <td>500</td> <td>625</td> <td>650</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>• The budget includes the line item 5100 – 210 Retirement for \$20,000. This allocation is under salaries for the ten (10) full-time teachers. <ul style="list-style-type: none"> <li>○ A Retirement line item is not found for other teachers, which includes an ESE teacher, an ESOL teacher, a Guidance Counselor, and a Curriculum Specialist.</li> <li>○ A Retirement line item is not found for the administrators, which includes a Director of Schools, an Assistant Principal, and a Dean (beginning the second year of operation).</li> </ul> </li> <li>• The staffing plan includes an allocation for one (1) Maintenance position. <ul style="list-style-type: none"> <li>○ However, the District is unable to verify the line item for the one (1) Maintenance position.</li> <li>○ Generally, the expense would come from Function 8100. However, there are no salaries identified in this Function.</li> </ul> </li> <li>• The staffing plan includes 0.5 Curriculum Specialist and 0.5 IT Specialist. <ul style="list-style-type: none"> <li>○ However, the District is unable to verify the line item for these positions.</li> </ul> </li> </ul>		Year 1	Year 2	Year 3	Year 4	Year 5	9	125	125	125	157	164	10	125	125	125	156	162	11	0	125	125	156	162	12	0	0	125	156	162	Total	250	375	500	625	650	<p>Attachment X</p> <p>Page 82</p> <p>Attachment X</p> <p>Page 82</p>
	Year 1	Year 2	Year 3	Year 4	Year 5																																
9	125	125	125	157	164																																
10	125	125	125	156	162																																
11	0	125	125	156	162																																
12	0	0	125	156	162																																
Total	250	375	500	625	650																																

It’s important for the Charter Review Team to have an understanding of the staffing plan and proposed budget for the high school. Please refer to the Five Year Staffing Plan below, which is located on page eighty-two (82) of the charter application.

**2023 Navigator Academy of Leadership High School Davenport Final Edited 6/13/23**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
<b>Director of Schools</b>	.5	.5	.5	.5	.5
<b>Assistant Principal</b>	.5	1	2	2	2
<b>Dean</b>	0	1	1	1	1
<b>Full Time Teachers (w/ Benefits)</b>	10	16	23	26	27
<b>ESE Teacher(s)</b>	.5	2	3	3	3
<b>Gifted Teacher(s)</b>	0	1	1	1	1
<b>ESOL Teacher(s)</b>	.5	1	1	1	1
<b>Guidance Counselor(s)</b>	1	1	2	2	2
<b>Curriculum Specialist</b>	0.5	1	1	1	1
<b>IT Specialist</b>	0.5	0.5	0.5	0.5	0.5
<b>SRO</b>	1	1	1	1	1
<b>Food Service Manager</b>	1	1	1	1	1
<b>Food Service Director</b>	0.5	0.5	0.5	0.5	0.5
<b>JV Coaches</b>	1	1	1	1	1
<b>Varsity Coaches</b>	0	0	1	1	1
<b>Athletic Director</b>	0	0	0	1	1
<b>Business Manager</b>	1	1	1	1	1
<b>Secretary</b>	1	1	1	1	1
<b>Data Prep Clerk</b>	1	1	1	1	1
<b>Maintenance 1</b>	1	1	1	1	1
<b>Lunch Staff</b>	1	2	2	2	2
<b>Nurse</b>	.5	.5	.5	1	1

**Interview Question:**

1. The staffing plan reflects .5 allocation for a Director of Schools for all five (5) years of operation.
  - a. Will the Director of Schools be shared with Navigator Academy of Leadership Davenport K-8?
  - b. Can you please identify the Director of Schools salary in the proposed budget found in Attachment X of the charter application?
  - c. The last application submitted to the District included a full allocation for a Principal. Please explain why you eliminated the Principal position and allocated a .5 Director of Schools position.
  - d. Attachment O includes the resume of Valeria V. Blandino, the current principal of Navigator Academy of Leadership K-8 Davenport. Will Ms. Blandino serve as the Director of Schools? If not, what role, if any, will she have at the proposed high school?

**Applicant's Response**

- b. Ms. Amato asks a clarifying question, "So, is the director of school being referred to as the principal, or is that a separate position?"

Mr. Calkins replies, "Yeah, I'm not sure that we discussed that. We talked about a Director of Schools and having a Co-Principal at each location. So, that the Director of Schools because they're going to be obviously sharing a campus in close proximity. It's a lot of the same programs offered. There is gonna be a lot of potential clash detections if we don't have somebody kind of who's the mediator between the two (2) campuses. So, the Director of Schools would be the head of schools, which you would typically call a Principal. But I think the Co-Principal would be the one of handling the heavy lifting for that particular school."

Ms. Amato states, "OK, so the Director of School would kind of be like over both of the, both of the campuses. What we would probably call like a Regional or a Senior Director or something, and then underneath this, the Director of Schools, you're going to have what? Two (2) Principals?"

Mr. Calkins explains, "Yeah, Co-Principal at each location. So they would report to the Director of Schools just so the collaboration again between the two (2) campuses, you know, stays cohesive."

Ms. Amato responds, "OK. So, you're showing half (1/2) of an Assistant Principal in year one (1). Is that a different position than a Co-Principal?"

Mr. Calkins states, "No. No that would be the same position."

Ms. Amato asks for clarification, "So the first year, the principal, the assistant principal or the Co-Principal will be half (1/2) at K-8 and half (1/2) at the at the high school."

Mr. Calkins replies, "Correct. Because I think in the first year we're only showing one grade. So, or is it two (2) grades?" Ms. La France confirms it is two (2) grades.

Ms. Amato shares, "So, if I'm looking at the chart, the Director of Schools will be split half from the high school and half from the K-8. And then what we have classified here as an Assistant Principal, that should really read Co-Principal."

Mr. Calkins answers, "Correct."

Ms. Amato asks, "So, then that brings me back to currently at the K-8 you have a Principal and how many Assistant Principals?"

Ms. LaFrance affirms, "So, currently this year we have a Principal and we have a Dean. Next year we're going to the Principal, Assistant Principal and a Dean. And our goal was the following year, once this school opens up the high school, we would be adding on another Assistant Principal to that school. So, they, we would not be losing that half from that school. But again, we'll have the same, the same person, right now in the beginning there."

b. The applicant states, "7300-100."

Ms. Amato confirms, “So, it's just it's under salaries, correct? It’s just all totaled together.”

Mr. Calkins affirms the line item number for the high school.

Ms. Amato verifies that line item covers all the salaries for the high school.

c. Ms. Amato states, “So the last application you submitted, umm, the high school was going to have a full principal position and it looks like you've eliminated the principal position.”

Mr. Calkins responds, “Correct.”

Ms. Amato clarifies, “You've allocated half a Director position, and then half of an AP position, but based on our previous, our conversation, we just had this half of an Assistant Principal is really, should be titled a Co-Principal that will be split with the K - 8.”

Mr. Calkins replies, “Yes, for year one (1), correct.”

Ms. Amato explains, “And then in year two (2), that it becomes a full time Co-Principal.”

Mr. Calkins answers, “Correct at the high school.”

Ms. Amato shares, “At the high school and then that other, the other half goes back to the K-8.”

Mr. Calkins responds, “Correct.”

d. Mr. Calkins confirms Valeria V. Blandino will serve as the Director of Schools.

**Note:**

1. A review of the Navigator Academy of Leadership Navigator K-8 charter application submitted to the District on August 1, 2017 reflects Principal and Assistant Principal positions. However, it does not include a Dean position. This position was added after the school opened.

**Interview Question:**

2. The staffing plan reflects .5 allocation for an Assistant Principal for year one (1) of operation.
  - a. Will the Assistant Principal be shared with Navigator Academy of Leadership Davenport K-8?
  - b. Can you please identify the Assistant Principal salary in the proposed budget found in Attachment X of the charter application?

**Applicant’s Response**

- a. Ms. Amato states, “We've already established that, that should really be reclassified as a half a unit of a Co-Principal and that will be shared with the K-8 program. Correct?”
- Ms. LaFrance responds, “Correct.”
- Ms. Amato reiterates, “OK. So, that will be a new person potentially filling that role since Ms. Blandino will be moving up basically in the system.”
- Mr. Calkins replies, “Correct.”
- b. Mr. Calkins answers, “It’s the same. 7300-100.”

**Interview Question:**

3. The proposed budget found in Attachment X of the charter application reflects the allocation for \$243,750 for School Administration salaries for the first year of operation (7300-100). Can you please explain which positions are included in this line item?

**Applicant’s Response**

Mr. Calkins states, “So, you’ve got Principal, Assistant Principal, Dean, Registrar, Office Manager, Relationship Manager, Secretary and two (2) Receptionists.”

Ms. Amato affirms that all of the budgets are in that 7300-100 line item on attachment X.

**Notes:**

1. The staffing plan located on page eighty-two (82) of the charter application does not include the following positions for the first year of operation, which Mr. Calkins lists as salaries in line item 7300-100 – Salaries:
  - a. Principal
  - b. Dean
  - c. Registrar
  - d. Office Manager (Business Manager is included in the Staffing Plan)
  - e. Relationship Manager
  - f. Two (2) Receptionists
2. A Data Prep Clerk is listed on the staffing plan on page eighty-two (82) of the charter application but was not identified by Mr. Calkins as a salary being paid from line item 7300-100 – Salaries.

**Interview Question:**

4. The staffing plan reflects 1.0 allocation for a Dean in the second year of operation. Can you please identify the Dean salary in the proposed budget found in Attachment X of the charter application?

**Applicant’s Response**

Ms. Amato does not ask this question because it was answered in the previous response.

**Interview Question:**

5. You provide staffing projections for five (5) years on page eighty-two (22) of the charter application. You indicate that there will be ten (10) full time teachers. You state on page nineteen (19) of the charter application, “NAL-003 will offer English, Mathematics, Science, and Social Sciences, along with electives such as visual and/or performing arts, physical education, career & technical exploration, leadership, and foreign languages as well as a variety of other electives that fulfill graduation requirements and enhance the instructional programs unique to our school.”
- Does the allocation of ten (10) full-time teachers include core and elective teachers?
  - Can you please provide a breakdown of the allocated full-time teacher positions?
  - The last Navigator Academy of Leadership High School application included the allocation of twelve (12) teachers for the same number of students (250) for the first year of operation. Please explain why you have allocated fewer full-time teachers.
  - Will any of the allocated ten (10) full-time teachers be shared with the middle school at the existing Navigator Academy of Leadership K-8 located in Davenport? If yes, please share how many high school teachers will provide services to the middle school.
  - Will any middle school teachers at the existing Navigator Academy of Leadership K-8 located in Davenport provide services to the proposed high school? If yes, please share how many middle school teachers will provide services to the high school.

**Applicant’s Response**

- Ms. LaFrance shares, “Yes. What we were hoping was to find teachers that might be dual certified, that can teach more than one section.”  
  
Ms. Amato restates, “OK. So, the ten (10) teachers is your core and your elective with the hopes that you can have teachers basically cross teach a variety of potential topics.”  
  
Ms. LaFrance replies, “Correct.”
- Ms. Amato provides clarification, “... How do you visualize your master schedule looking with serving grades nine (9) and ten (10)?”  
  
Ms. LaFrance replies, “Well, I think it's gonna depend on the teachers we get. But we do see like, for example, an English teacher, they won't just be teaching English 1. So, they would be teaching, whether it be English 1 or English 2. It just depends on how the schedule would fall out, but that would be our hope.”  
  
Ms. Amato recaps, “So, basically you'll determine based on the needs of the students and the students and the teachers that you are able to hire and their certification credentials.”
- Mr. Calkins explains, “Just going back to the same answer we provided before. We looked at previous budgets from the current Charter operators and we just followed that model.”
- Mr. Calkins stipulates, “Yeah, we don't have it set up that way.”
- Mr. Calkins responds, “No, ma'am.”

**Interview Question:**

6. Will the proposed high school share services and/or personnel with the existing Navigator Academy of Leadership K-8 school? If so, please share what services and/or personnel will be shared between the two (2) schools.

**Applicant's Response**

Ms. LaFrance states, "Well, I think you know one thing that we stated before is we are going to have like our ESOL teacher for that first year be shared."

Mr. Calkins shares, "The other services you know would be like landscaping and cleaning, and there's different things that would be shared there, as well."

Ms. Amata adds, "ELL staff will be shared. We've already identified that the director will be shared. We've identified the Co-Principal will be shared that first year. And then, but you've clarified that none of the core and elective teachers will be shared, they will be separate and independent of each other."

Ms. LaFrance replies, "Absolutely."

Ms. Amato asks clarifying questions, "So, Jeremy, you talked about basically the facility component, the maintenance or custodial. What about cafeteria, media? What do those look like? Computer labs?"

Mr. Calkins explains, "Yeah, I think the, you know, obviously we're gonna have to rework our services agreements with our providers. But those will be shared services."

Ms. Amato summarizes, "So you're outside, facility, maintenance those types of things will be shared."

Mr. Calkins responds, "Correct."



**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.

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

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant shares, “All new teaches in the BEST (Beginning Educator Support and Training) team will be paired with a mentor.”</li> <li>• The application stipulates, “NAL-003 will look for personnel who have a shared vision with the school as well the enthusiasm and commitment required.”</li> <li>• The applicant has addressed core standards of background screening; employee pay and benefits; and evaluation.</li> <li>• The applicant asserts, “NAL-003 will provide competitive salaries that are comparable to the District and a retirement plan (FRS) in order to attract and retain loyal, competent, and committed employees.”</li> <li>• The applicant explains, “NAL-003 will use Polk County’s Employee Handbook and Benefits Information as a reference.”</li> </ul>	<p>Page 89</p> <p>Page 91</p> <p>Pages 87 - 93</p> <p>Page 90</p> <p>Page 87</p>

Concerns and Additional Questions	Reference

**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.
- 

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

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant states, “At NAL-003. The administration will work collaboratively with the Instructional Leadership Team (ILT) to decide the professional development needs of instructional personnel. The ILT consists of instructional coaches, lead teachers, department heads, and any other person selected by the principal who can provide the input necessary to make decisions on professional development.”</li> <li>• The applicant avows, “As a new charter school, teachers will report to the school two weeks prior to the start of the school year in order to attend required professional development workshops and to properly prepare for the school year.”</li> <li>• The applicant explains, “There are approximately 8 teacher planning days throughout the school year and, it is estimated that at least 6 of those will be dedicated to full-day professional developments (approximately 40 hours of PD).”</li> </ul>	<p>Page 94</p> <p>Pages 95 – 96</p> <p>Page 96</p>

Concerns and Additional Questions	Reference

**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
<ul style="list-style-type: none"> <li>• The applicant presents an enrollment and admissions process, which appears to be open, fair, and in accordance with applicable law.</li> <li>• The applicant shares, “The Governing Board works with diverse groups within the community to obtain help in disseminating information. This information will be presented in English and Spanish and may be translated to other languages should the need arise.”</li> </ul>	<p>Pages 98 – 99</p> <p>Page 98</p>

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>• When describing its enrollment policies and procedures, the applicant states it may give enrollment preference to “Students who have successfully completed a voluntary prekindergarten education program under ss. 1002.51-1002.79 provided by the charter school or the charter school’s governing board during the previous year”                         <ul style="list-style-type: none"> <li>○ This preference is not appropriate for high school application.</li> </ul> </li> </ul>	<p>Page 98</p>

**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.

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

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant explains that the School will have an Educational Excellence School Advisory Council (EESAC).</li> <li>• The applicant presents an array of activities to encourage parental involvement.</li> <li>• The applicant states, “NAL-003 intends to work with local civic agencies, business and community partners to support the school in a variety of ways.”</li> <li>• The applicant specifies, “The Governing Board of NAL-003 will appoint a representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes.”</li> <li>• The applicant provides letters of support from the Davenport City Manager and D.A. Davidson &amp; Co. Additionally, the applicant provides evidence of parental support for a charter high school.</li> </ul>	<p>Page 99</p> <p>Pages 99 – 100</p> <p>Page 100</p> <p>Page 101</p> <p>Attachment T</p>

Concerns and Additional Questions	Reference

### 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 type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant affirms, “NAL-003 will be located on the same campus as NAL-002 at 495 Holly Hill Road in Davenport, FL.”</li> <li>• The applicant maintains, “In accordance with 1002.33(18)(a)(b) F.S., the school facility will comply with the Florida Building Code pursuant to chapter 553, with the exception of State Requirements for Educational Facilities,</li> </ul>	<p>Page 102</p> <p>Page 102</p>

the exception of SREF. The school’s facility will comply with the Florida Fire Prevention Code, pursuant to s. 633.208.”	
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Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>The applicant provides inconsistent information regarding the flat rate rental fee.</li> </ul>	Pages 103 and 114

<p><b>Interview Question:</b></p> <p>1. You share on page one hundred two (102) of the charter application, “NAL-003 will be located on the same campus as NAL-002 at 495 Holly Hill Road in Davenport, FL. The property is approximately 14.5 acres and will house both school buildings.” The Charter Review Team has concerns regarding student safety since the high school will be sharing the same campus with Navigator Academy of Leadership K-8 Davenport.</p> <ol style="list-style-type: none"> <li>The Drawing Index located on the first page of the Final Construction Plans for NAL-003 (Attachment FF) identifies C-4 as the “Traffic Circulation Plan”. However, C-4 is not included as part of the attachment. Can you please explain the traffic pattern for the high school and what precautions will be taken to ensure student safety taking into consideration the proposed high school will have student drivers.</li> </ol>
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<p><b>Applicant’s Response</b></p> <ol style="list-style-type: none"> <li>Mr. Calkins maintains, “So, I apologize that wasn't included because we have it and I do want to make a comment here that I am have been intimately involved in traffic circulation plans for more than fifteen (15) years. In fact, I was asked by Hillsborough County to sit on the committee to try to figure out some of our circulation problems here in Hillsborough County. So again, I apologize that we didn't include that and I can forward this to you right after we get off the call. But, we do have a good circulation plan where it, the traffic pattern, will be housed for the high school on their side of the campus. They will obviously have to exit through the middle school, but the way that we'll ensure safety is by having staggered arrival and dismissal times between the two (2) campuses.”</li> </ol> <p>Ms. Amato shares, “You're being mindful as you're planning strategically those, those facilities.”</p>
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<p><b>Interview Question:</b></p> <p>2. You stipulate on page one hundred two (102) of the charter application, “There will be an outdoor sports field that will allow for baseball and soccer.” Yet, you do not list baseball as a potential sport on page seventy (70).</p> <ol style="list-style-type: none"> <li>Will baseball be one of the sports offered at the high school?</li> <li>Will the high school include any other sports facilities? If so, please describe.</li> </ol>
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<p><b>Applicant’s Response</b></p> <ol style="list-style-type: none"> <li>Mr. Calkins explains, “Yeah, we’re looking at that. One of the things is the cost of construction. Obviously, when we did our first budget, things were different than they</li> </ol>
--

are now from a development standpoint. I know by previous experiences, sometimes you have, the lighting becomes an issue with baseball and so we just have to, we have to consider the costs and they are not fully realized right now. So, that's why it's question mark.”

- b. Ms. Amato states, “And you touched on B, but let me just make sure we have it correctly. So will the high school include any other sports facilities? I do believe you said a gym and then you also said a soccer field.”

Mr. Calkins replies, “Soccer field. Correct.”

Ms. Amato states, “If you're going to have a gym, you could even offer volleyball.”

Mr. Calkins responds, “There you go. Add it to the list.”

**Interview Question:**

3. Do you believe that the projected facilities cost for the new high school is reflective of current significant price increases and supply concerns?

**Applicant's Response**

Mr. Calkins explains, “I do. We've been going over it. We've been getting new bids and we've been talking with our investment bankers and our suppliers and we do, we, we believe that we're in line. It's obviously gone up a little bit. Well, it's come back. It was way up actually last year and it's come back a little bit. So, we feel like we're in line. And plus to that point, one of the things that is going to be a benefit to the high school is we had exorbitant development cost at the outset of the middle school because we had to, there was, there was zero infrastructure in place. So, we had to bring in the storm sewer lines. We had to bring in everything. We actually had an agreement with the developer last time that we had to do some offsite improvements to their property. So, we believe based on those factors that those costs are gonna offset the increases that we've seen now in development construction costs.”

**Interview Question:**

4. Please share design plans, if any, for the proposed high school to enhance security and crime prevention.

**Applicant's Response**

Mr. Calkins says, “So, we're going to have fencing, just like what we have at the middle school right now. There's two (2) layers of doors. We're looking at bulletproof glassing before you can get in, you can access the facility. I think in our in our safety walk through the most recent one, we passed with flying colors. So, we're gonna, we're gonna use the same standards that we're currently using.”

**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.

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

Strengths	Reference

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>• The applicant validates, “In the event that NAL-003 could find a private bus vendor, in accordance with F.S. §1002.33 (20) (c), transportation will not be a barrier to equal access for all students within a reasonable distance of the school. NAL-003 will provide free school bus transportation by contracting out the service to a vendor. Should a vendor be contracted, transportation will be provided for students who live beyond 2 miles and up to 4 miles from the school or whose walking path to the school presents safety concerns.”                             <ul style="list-style-type: none"> <li>○ However, a review of the budget indicates that the applicant does not budget for transportation for any of the five (5) years of operation. Consequently, there is not projected funding for transportation in the event the applicant finds a transportation company which offers services in the Davenport area.</li> <li>○ Additionally, the applicant fails to project ridership for all five (5) years of operation on the Revenue Estimate Worksheets.</li> </ul> </li> <li>• It is unclear how the School will accommodate special needs students with IEPs depicting eligibility for transportation services.</li> </ul>	<p>Page 105</p> <p>Attachment X</p> <p>Attachment W</p> <p>Pages 105 – 106</p>



<ul style="list-style-type: none"> <li>○ As stated previously, the proposed budget does not include expenses for transportation services.</li> </ul>	Attachment X
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<p><b>Interview Question:</b></p> <ol style="list-style-type: none"> <li>1. You state on page one hundred five (105) of the charter application, “NAL-002 has been in operation since 2019 and has continually researched and contacted transportation companies in an effort to be able to provide bus transportation to its students. To date, there have not been any companies that operate in the area that are capable of providing this service. All students that attend NAL-002 either walk to school, ride their bike, use a private bus, or arrive and leave school via parent pickup. This in conjunction with a driver shortage in the district. Accordingly, NAL-003 will not be providing bus transportation to its students.”             <ol style="list-style-type: none"> <li>a. You have indicated that you continually research and contact transportation companies. Did you pursue the acquisition of transportation services prior to submitting a high school application? If not, why?</li> <li>b. Please expand on students utilizing a private bus to attend school. Who coordinates the private bus transportation for students?</li> <li>c. A review of the Navigator Academy of Leadership Davenport (K-8) Financial Audit for fiscal year ended June 30, 2022 indicates the School ended the 2022 school year with an unrestricted fund balance of \$1,598.569. Considering the K-8 school is now established with a sizeable unrestricted fund balance, has the Board considered purchasing its own fleet of buses and hiring bus drivers to provide transportation for K-12 students? If not, why hasn’t this been considered to ensure that the lack of transportation does not serve as a barrier for students to attend your schools?</li> </ol> </li> </ol>
---

<p><b>Applicant’s Response</b></p> <ol style="list-style-type: none"> <li>a. Mr. Calkins acknowledges, “We did originally and it was the same, uh, same situation. Couldn't identify a, a good provider. We have not recently. So, we have not gone back since this new application.”             <p>Ms. Amato asks, “Any particular reason why?”</p> <p>Mr. Calkins replies, “No, no.”</p> </li> <li>b. Ms. LaFrance states, “So, currently right now we do not have any. However, the principal would be the one at the school that would handle that.”             <p>Ms. Amato asks, “And what exactly do you mean by a private bus? Like, are you talking like daycare bus? Are you talking an outside off campus after school daycare program?”</p> <p>Ms. LaFrance replies, “Yeah, we're talking more like the after school programs that pick up our students.”</p> <p>Ms. Amato clarifies, “OK. I think the word private bus through us for a loop because I'm, we were all thinking like a private, like a limousine, you know, that that type of</p> </li> </ol>
---

thing. So, really by private bus you're, you're referencing outside entities, whether they be after school, gymnastics or dance or karate, those types of programs.”

Ms. La France answers, “Exactly. Exactly.”

Ms. Amato confirms, “So. then the principal wouldn't coordinate the principal may coordinate where they pick up, but the parents make those arrangements with that outside program.”

Ms. LaFrance states, “Absolutely, yes.”

- c. Mr. Calkins maintains, “So, it has not been considered yet, but thanks for bringing it up because we will definitely bring it up in the workshop. So, we appreciate that. And I think the answer to the second part of that question is we don't think there has been a barrier for anybody to attend the schools. We haven't gotten that feedback yet, so.”

**Interview Question:**

2. How are special needs students with IEPs depicting eligibility for transportation services accommodated?
- a. Where can the expense for transporting special needs students be found in the proposed budget (Attachment X)?

**Applicant’s Response**

- Ms. LaFrance responds, “Well, again, I think it's gonna be case by case basis. We currently do not have any. So, it would depend on the student population that we have.”
- a. Ms. Amato shares, “All right, which is why we can't find any in the budget X attachment X.”

**Interview Question:**

3. How will the School communicate that transportation services are not available to students attending Navigator Academy of Leadership High School?
- a. Is this the same method of communication utilized at Navigator Academy of Leadership K-8 school?

**Applicant’s Response**

- a. Mr. Calkins answers, “Yeah, I think you answered that simply would be the same methodology.”

Ms. LaFrance maintains, “So, it's on our, it's on our website and it's also on our registration paperwork that has been changed that, that's listed almost in bold up top. So, we wanna make sure everybody knows from the beginning.”

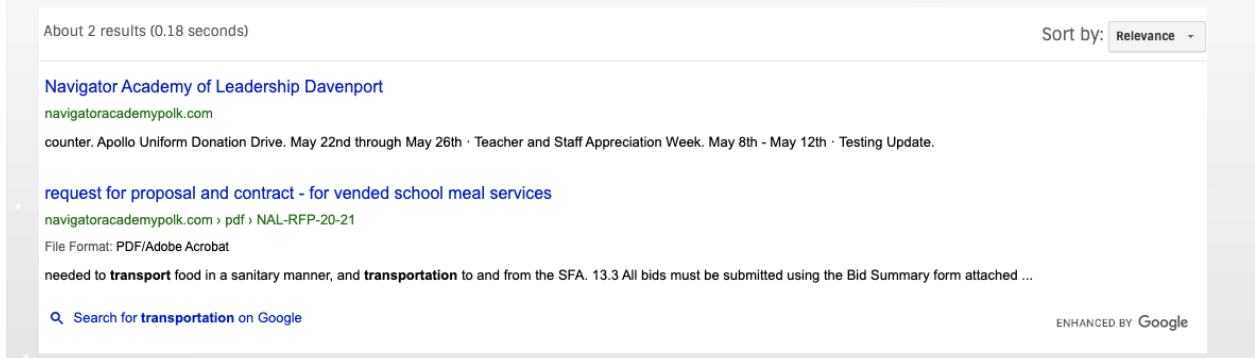
**Notes:**

1. A thorough review of the Navigator Academy of Leadership Davenport K-8 website does not include information regarding the unavailability of student transportation, as stated by the applicant. A search for “transportation” on the School’s website provides the two (2) entities

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found below, which do not include information relevant to student transportation.

### SEARCH RESULTS



About 2 results (0.18 seconds) Sort by: Relevance ▾

**Navigator Academy of Leadership Davenport**  
[navigatoracademypolk.com](http://navigatoracademypolk.com)  
counter. Apollo Uniform Donation Drive. May 22nd through May 26th · Teacher and Staff Appreciation Week. May 8th - May 12th · Testing Update.

**request for proposal and contract - for vended school meal services**  
[navigatoracademypolk.com](http://navigatoracademypolk.com) › pdf › NAL-RFP-20-21  
File Format: PDF/Adobe Acrobat  
needed to **transport** food in a sanitary manner, and **transportation** to and from the SFA. 13.3 All bids must be submitted using the Bid Summary form attached ...

[Search for transportation on Google](#) ENHANCED BY Google

If the website does include information regarding the unavailability of transportation, it must be noted that it is not transparent or easily attainable for parents. Please refer to the Navigator Academy of Leadership Davenport K-8 website:

<https://navigatoracademypolk.com/>

2. The registration paperwork located in Section S of the proposed charter application does not contain bolded transportation information across the top of the page(s), as stated by the applicant.

Please refer to the Navigator Academy “Student Registration Form 2024-2025” and “Student Emergency Contact Information 2024-2025 School Year” (Attachments A and B), which asks for the student’s method of transportation. The options include: Parent Pickup, Walks Home, Carpool, and Private Transportation.

**DISTRICT ATTCHMENT A**



**Student Registration Form 2024-2025**

Please complete ALL areas below:

<b>Polk Student ID #</b>	<b>Grade:</b>	<b>Birth Date:</b>	<b>Gender:</b> <input type="checkbox"/> Male <input type="checkbox"/> Female
<b>Last Name:</b>	<b>Residence Address:</b>		
<b>Middle Name:</b>			
<b>First Name:</b>	<b>Mailing Address:</b>		
<b>Telephone #:</b>			
Has the child repeated any grade? <input type="checkbox"/> Yes <input type="checkbox"/> No <b>If yes, which grade?</b>			
<b>Student lives with:</b> <input type="checkbox"/> Both Parents <input type="checkbox"/> Mom <input type="checkbox"/> Dad <input type="checkbox"/> Shared Custody <input type="checkbox"/> Other: _____			
<b>Ethnicity - Hispanic/Latino:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No		<b>Method of Transportation:</b> <input type="checkbox"/> Parent Pickup <input type="checkbox"/> Walks Home <input type="checkbox"/> Carpool <input type="checkbox"/> Private Transportation - Name of Company: _____	
<b>Race:</b> <input type="checkbox"/> White <input type="checkbox"/> Black/African American <input type="checkbox"/> American Indian/Native Alaskan <input type="checkbox"/> Asian <input type="checkbox"/> Native Hawaiian or Pacific Islander			
<ul style="list-style-type: none"> <li>• Has the student been in an exceptional education (ESE) or any other Special Education Program? <input type="checkbox"/> Yes <input type="checkbox"/> No</li> <li>• Has the student ever had an IEP? <input type="checkbox"/> Yes <input type="checkbox"/> No      • Has the student ever had an LP? <input type="checkbox"/> Yes <input type="checkbox"/> No</li> <li>• Has the student been determined eligible under Section 504 and/or has a Section 504 Plan? <input type="checkbox"/> Yes <input type="checkbox"/> No</li> <li>• Has the student ever been in ESOL or ELL program or Class? <input type="checkbox"/> Yes <input type="checkbox"/> No</li> <li>• Has the student ever attended a school in Polk County (grades PreK-12)? <input type="checkbox"/> Yes <input type="checkbox"/> No</li> </ul>			
<b>Name of Last School/Current School Attended:</b>			
<b>Address of Last School/Current School Attended:</b>			
<p>Has the student ever been expelled from any school, had an arrest which resulted in a charge, had any other Department of Juvenile Justice actions against him/her, or been referred for mental health services? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><i>If yes is answered for any of the above, please describe below (Florida Statute 837.06 provides that whoever knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his official duty shall be guilty of a misdemeanor of the second degree).</i></p>			
<b>Enrolling Parent/Guardian Name (Print):</b>			
<b>Enrolling Parent/Guardian Signature:</b>			
<b>Date:</b>			

Navigator Academy of Leadership will utilize an automated parent notification system to notify parents of important school information. Due to recent changes to the Telephone Consumer Protection Act (TCPA), parents are required to provide prior expressed consent to receive automated communication on their mobile devices. Consent is not required in the call or text is for emergency purposes or if made directly from a principal, teacher, or other staff member.

\_\_\_\_\_, voluntarily consent to give the school permission to contact me via my cellular device for automated phone calls or SMS text messages for general messages. I understand that emergency messages are excluded from this permission. By signing, I am stating that I am the owner of this cellular device and its user contract. I will notify the school immediately if this change.

Parent/Guardian Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Cellular # \_\_\_\_\_  I DO NOT give consent

**DISTRICT ATTCHMENT B**



**STUDENT EMERGENCY CONTACT INFORMATION  
2024-2025 School Year**

Please complete all areas below:

Polk Student ID: _____	Grade: _____	Birth Date: _____	Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female
Last Name: _____	Residence Address: _____		
First Name: _____	Mailing Address: (if different) _____		
Middle Initial: _____	Telephone #: _____		
Student lives with: _____	<input type="checkbox"/> Mom <input type="checkbox"/> Dad <input type="checkbox"/> Shared Custody <input type="checkbox"/> Other: _____		

Method of Transportation: <input type="checkbox"/> Parent Pickup <input type="checkbox"/> Walks Home <input type="checkbox"/> Carpool <input type="checkbox"/> Private Transportation  <input type="checkbox"/> Court Order on File <input type="checkbox"/> Court Order Received by School Parents appearing on the birth certificate have access to the student and student records unless a court order deems otherwise. <u>School must have a copy.</u>
--

Contact #1 MUST be primary parent/guardian	Contact 1 Parent/Guardian	Contact 2	Contact 3	Contact 4
Relation to Student: <input type="checkbox"/> Parent <input type="checkbox"/> Guardian <input type="checkbox"/> Step Parent <input type="checkbox"/> Other (please specify) _____	<input type="checkbox"/> Parent <input type="checkbox"/> Guardian <input type="checkbox"/> Step Parent <input type="checkbox"/> Other (please specify) _____	<input type="checkbox"/> Parent <input type="checkbox"/> Guardian <input type="checkbox"/> Step Parent <input type="checkbox"/> Other (please specify) _____	<input type="checkbox"/> Parent <input type="checkbox"/> Guardian <input type="checkbox"/> Step Parent <input type="checkbox"/> Other (please specify) _____	<input type="checkbox"/> Parent <input type="checkbox"/> Guardian <input type="checkbox"/> Step Parent <input type="checkbox"/> Other (please specify) _____
First Name				
Last Name				
Cell Phone				
Home Phone				
Work Phone				
Email Address				
Notify if Sick / Injured	YES	Y or N	Y or N	Y or N
Receive Automated Emergency Calls	YES	Y or N	Y or N	Y or N
Notify if Absent	YES	Y or N	Y or N	Y or N
Pick Up Allowed	YES	Y or N	Y or N	Y or N
Records Access Allowed	YES	Y or N	Y or N	Y or N
Personal Contact Allowed at School	YES	Y or N	Y or N	Y or N







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- Mr. Calkins answers, “Yes.”
- b. Ms. LaFrance shares, “I do have our prices for breakfast and lunch. So, for breakfast, for breakfast, we’re currently charging \$3.00 and for lunch we’re currently charging \$4.00.”
- c. Mr. Calkins asserts, “We do because our location isn't going anywhere, so we have to assume that it's going to be the same demographic.”
- d. Mr. Calkins replies, “Well, we anticipate it's going to be the same, the same ratios, you know, that we currently have. So, I think we're looking up at information now.”

**Notes:**

1. Under “Interfund Transfers” located on page twenty-four (24) of the Navigator Academy of Leadership Davenport Independent Auditor’s Report for year ending June 30, 2022 reveals:

*The School’s Special Revenue fund transferred \$20,958 to the General Fund to provide financial support for the Food Service costs of operation and maintenance including utility costs among other costs incurred by the General Fund for the Food Service Program.*

The Independent Auditor’s Report for 2020 and 2021 do not include interfund transfers to provide financial support for Food Service.

2. A review of the Navigator Academy of Leadership Davenport Independent Auditor’s Reports for years ending June 30, 2020, 2021, and 2022 reflect the following information for Food Service.

<b>FOOD SERVICE</b>		Program Revenues			Net (Expenses) Revenue and Changes Net Position
Year Ending June 30	Expenses	Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions	Governmental Activities
2020	\$113,023	\$18,551	-	-	(\$94,472)
2021	\$257,202	\$10,185	\$14,2979	-	(\$104,038)
2022	\$413,921	\$1,889	\$434,879	-	\$22,847

3. The Independent Auditor’s Reports may be viewed at:

[Navigator Academy of Leadership K-8 Davenport Annual Financial Audits](#)

2021-22 Fiscal Year

[https://flauditor.gov/pages/chschools\\_efile%20rpts/2022%20navigator%20academy%20of%20leadership%20davenport.pdf](https://flauditor.gov/pages/chschools_efile%20rpts/2022%20navigator%20academy%20of%20leadership%20davenport.pdf)

2020-21 Fiscal Year

[https://flauditor.gov/pages/chschools\\_efile%20rpts/2021%20navigator%20academy%20of%20leadership%20davenport.pdf](https://flauditor.gov/pages/chschools_efile%20rpts/2021%20navigator%20academy%20of%20leadership%20davenport.pdf)



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2019-20 Fiscal Year

[https://flauditor.gov/pages/chschools\\_efile%20rpts/2020%20navigator%20academy%20of%20leadership%20davenport.pdf](https://flauditor.gov/pages/chschools_efile%20rpts/2020%20navigator%20academy%20of%20leadership%20davenport.pdf)

<b>Interview Question:</b>
4. Will the high school share a lunchroom facility, vendor, services, and/or staff with the K-8 school for food services? If so, please explain what will be shared between the two (2) schools.
<b>Applicant's Response</b>
Mr. Calkins confirms, "So, vendors for sure, services for sure. Umm, the lunchroom facility, I think in our budget right now, we have allocated, it will be a standalone for the high school. So, but the other cleaning services, like I said before, other facility services, you know, they'll just be amended in our current contract."  Ms. Amato clarifies, "So, the facility, the vendor cleaning staff, all of that will be shared."  Mr. Calkins replies, "Correct. Yeah."



Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>• The applicant asserts, “As mentioned earlier, NALHS will have an SRO on campus during school hours. This is in accordance with SB 7026 (MSDSA). Additionally, NALHS will contract with a Mental Health Counselor and will opt-in to the District’s Mental Health Plan as we have with NAL Davenport K- 8.”                             <ul style="list-style-type: none"> <li>○ The budget reflects \$19,275 for Health Services (5200-6130).</li> <li>○ The staffing plan includes 0.5 allocation for a Nurse.</li> <li>○ Consequently, it does not appear that the School has appropriately allocated expenses to cover both positions – nurse and mental health counselor.</li> </ul> </li> <li>• The applicant stipulates, “NAL-003 will [SIC] adopt Polk County’s Public School Critical Incident Response Plan. Teachers will receive training during Preplanning and refresher training throughout the school year.”                             <ul style="list-style-type: none"> <li>○ In accordance with §1006.07(6)(d), F.S., Each district school board and charter school governing board must adopt an active assailant response plan. By October 1 of each year, each district school superintendent and charter school principal shall certify that all school personnel have received annual training on the procedures contained in the active assailant response plan for the applicable school district or charter school.                                     <ul style="list-style-type: none"> <li>▪ The applicant does not address the adoption of an active assailant response plan or the certification that all personnel have been properly trained.</li> </ul> </li> </ul> </li> <li>• The applicant eliminated the language found in previous submitted charter applications which, identified titles for safety drills with color codes. However, the applicant states, “Detailed instructions for safety drills will be provided to all teachers and staff using color-coded cards for easy reference.”</li> </ul>	<p>Page 109</p> <p>Attachment X</p> <p>Page 82 Attachment X</p> <p>Page 109</p> <p>Page 110</p>

Interview Question:
<p>1. You assert on page one hundred nine (109) of the charter application, “As mentioned earlier, NALHS will have an SRO on campus during school hours. This is in accordance with SB 7026 (MSDSA). Additionally, NALHS will contract with a Mental Health Counselor and will opt-in to the District’s Mental Health Plan as we have with NAL Davenport K- 8.”</p> <ul style="list-style-type: none"> <li>a. Please indicate which line item in the budget (Attachment X) includes the allocation for a Mental Health Counselor.</li> <li>b. Is the Mental Health Counselor a different position than the Guidance Counselor?</li> </ul>
Applicant’s Response

- a. Mr. Calkins states, “So, I think there's, three (3) line items there that'll all go towards that allocation. 6100 -130. We've got 6130 for Health Services.” That would be your primary. And yeah, we have a different line for that than the Guidance Counselor.”
- b. Ms. Amato seeks clarification, “OK. So, that, so the Mental Health Counselor is different than the Guidance Counselor?”
- Mr. Calkins replies, “Correct.”
- Ms. Amato asks, “And then the Mental Health Counselor would be a Navigator employee, not one that's from the District?”
- Mr. Calkins answers, “Correct.”

**Notes:**

1. Mr. Calkins shares that there are three (3) line items that will go towards the Mental Health Counselor.
  - a. Line item 6100-130 is allocated for a Guidance Counselor position (\$48,500).
  - b. Line item 6130 is allocated for Health Services (\$19,275).
  - c. The third line item is not provided.
2. The School has also allocated a .05 Nurse position. It is unclear which line item will be used for this allocation.

**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 type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Strengths	Reference

Concerns and Additional Questions	Reference
<ul style="list-style-type: none"> <li>• As illustrated in the information and charts below, the applicant provides conflicting information regarding debt service, money owed annually for rent. Consequently, the District is unable to determine the actual costs for the utilization of the facility.                             <ul style="list-style-type: none"> <li>○ The applicant states, “The Board will engage the same facilities developer that constructed NAL-002in [SIC] order to design, plan, and construct facilities for <b>lease</b>, which are appropriate to the needs of NAL-003.”</li> <li>○ The applicant shares, “All development expenses including, but not limited to; legal, engineering, permitting, interior renovation construction, site plan related expenses, and playground development are expenses agreed to by the facility’s developer/owner in exchange for a <b>lease</b> with the school tenant in the amounts described in the attached financial plan.”</li> <li>○ The applicant explains, “Once the building is completed, <b>rent</b> will be at a flat rate of: Year 1 - \$270,533; Year 2 - \$531,410; Year 3 - \$678,275; Year 4 - \$793,730; Year 5 - \$879,250.”</li> </ul> </li> </ul>	District Attachments (C – I)  Page 102  Page 103  Page 103

<ul style="list-style-type: none"> <li>○ The applicant specifies, “Deb [SIC] Service – 9200 – The school will be paying \$270,533 (projected) in <b>rent</b> the first year and will increase according to student growth as will be outlined in Lease Agreement (once available). The budget does allocate for a larger Lease Agreement after year 4 to account for escalation and principal.”</li> <li>○ The Sample Draft Land and Building Lease Agreement reflects, “Tenant shall pay to Landlord as base monthly rent (“<b>Base Monthly Rent</b>”) as set forth below.”</li> <li>○ The application includes a letter dated September 2021 from DA Davidson in reference to Closed Bond Financing to Purchase Facility &amp; Finance New High School Project. The letter states, “Navigator Academy of Leadership Davenport (the School) worked with D.A. Davidson &amp; Co. (the Underwriter) to underwrite bonds and finance the purchase of their existing K-8 facility in Davenport and finance a high school expansion.” The letter also emphasizes that one of the key structural highlights of the School’s bond financing is the “Ability to finance up to \$12,500,000 for a high school expansion.”</li> </ul>	<p>Page 114</p> <p>Page 3, Attachment V</p> <p>Attachment T</p>
<ul style="list-style-type: none"> <li>● The budget does not provide expenses for all employees outlined in the staffing plan.</li> <li>● The budget contains \$37,500 for the first year of operation for "Technology Fee" (\$150 per student).</li> <li>● The budget includes expenses for food in line items 5100, 6400, and 7100. The total amount for the first year is \$1,600 and increases to \$4000 by year five (5).             <ul style="list-style-type: none"> <li>○ This expense is not permissible for public education.</li> </ul> </li> <li>● The budget includes revenue of \$250,000 for the Charter School Program grant (CSP) for the first two (2) years of operation.             <ul style="list-style-type: none"> <li>○ The CSP is a competitive grant and is not considered guaranteed income.</li> </ul> </li> <li>● The budget includes capital outlay funding for all five (5) years of operation.             <ul style="list-style-type: none"> <li>○ The School is not eligible for capital outlay funds until year three (3) if it meets criteria established by law.</li> <li>○ Navigator Academy of Leadership Navigator K-8 did not receive capital outlay funding until year three (3) of operation.</li> </ul> </li> </ul>	<p>Page 82</p> <p>Attachment X</p> <p>Attachment X</p> <p>Attachment X</p> <p>Attachment X</p> <p>Attachment X</p>

<ul style="list-style-type: none"> <li>• The budget reflects revenue for the first year of operation for \$60,000: 3495 – <i>Other Miscellaneous Local Sources (Fundraisers, After School Programs, etc.)</i> <ul style="list-style-type: none"> <li>○ Other Miscellaneous Local Sources is not guaranteed revenue.</li> </ul> </li> </ul>	Attachment X
<ul style="list-style-type: none"> <li>• The budget includes <i>Project Advance from Development</i> for \$75,000 in preplanning and \$275,000 for the first year of operation. <ul style="list-style-type: none"> <li>○ It is not clear how and when this money will be repaid to the Developer.</li> </ul> </li> </ul>	Attachment X
<ul style="list-style-type: none"> <li>• The applicant states, “NAL-003will [SIC] apply for a \$25,000 planning and design grant, as provided by the Charter School Implementation Grant Program. If awarded, the grant will assist the school with the start-up costs which will be incurred prior to the period when the school will begin to receive operational funding from the sponsor. This is <b>NOT</b> included in the budget.</li> </ul>	Page 112
<ul style="list-style-type: none"> <li>• <b>Start-Up Budget Revenue:</b> In addition to the CSP grant monies, many services incurred during the planning period will be provided by the Educational Service Provider as part of the contracted services. In the event that the start-up grant is not awarded, NAL-003has [SIC] identified a lender that will provide a line of credit to support the opening expenditures. ” <ul style="list-style-type: none"> <li>○ The applicant provides conflicting information regarding the utilization of CSP grant funding for revenue in the proposed budget.</li> <li>○ The School does not identify a lender, as stated.</li> </ul> </li> </ul>	Pages 112 - 113
<ul style="list-style-type: none"> <li>• The applicant explains, “NAL-003has [SIC] secured a MOU with DA Davidson for any needed financing if cash flow is short. These funds are in the amount of \$350,000 and will be divided between the pre-opening and first 2 years of the school. Additionally, the ESP fees are variable and can be adjusted to provide for a healthy operating budget.” <ul style="list-style-type: none"> <li>○ The budget reflects revenue for \$350,000 for preplanning and the first year of operation.</li> <li>○ Project</li> </ul> </li> </ul>	Page 113
<ul style="list-style-type: none"> <li>• The applicant provides two (2) letters from D.A. Davidson. However, neither letter contains information regarding a MOU for \$350,000 for any needed financing in the event the School’s cash flow is short.</li> </ul>	Attachment X
<ul style="list-style-type: none"> <li>• The proposed start up budget does not include any expenses other than \$34,780 for School Administration.</li> </ul>	Attachments T and Z
<ul style="list-style-type: none"> <li>• The applicant asserts in reference to the year one (1) cash flow contingency plan in the event that revenue projections are not met (or not met on time), “The school has secured a</li> </ul>	Attachment Y
<ul style="list-style-type: none"> <li>• The applicant asserts in reference to the year one (1) cash flow contingency plan in the event that revenue projections are not met (or not met on time), “The school has secured a</li> </ul>	Page 115

<p>loan in order to help with cash flow due to unexpectedly lower than projected enrollment. These loans will be used to make up the difference needed (if any) based on the contingency plan, to ensure that the school operates at maximum efficiency providing for the optimum educational environment to achieve the school’s educational goals keeping in mind the mission and vision of the school.”</p> <ul style="list-style-type: none"> <li>○ The applicant does not provide evidence of the entity in which it has secured a loan with or the amount of the loan.</li> <li>● The District is not able to align positions outlined in the staffing plan with the proposed budget for:             <ul style="list-style-type: none"> <li>○ Maintenance position (1.0 allocation)</li> <li>○ Curriculum Specialist (0.5)</li> <li>○ IT Specialist (0.5)</li> </ul> </li> <li>● The applicant has allotted only \$19,275 in line item 6130 for speech and language services, Mental Health Counselor, and a 0.5 nurse position.</li> <li>● The budget does not include expenses for substitute teachers, a necessity for the daily operation of a school.</li> <li>● At first glance it appears that the applicant does not adequately budget for employee benefits. However, a comparison analysis of the 2021 Navigator Academy of Leadership budget and the 2023 Navigator Academy of Leadership budget reflects that the School budgeted more for employee benefits in the most recent submitted application than in the previous one. Please see comparison chart below. (District Attachment J)</li> <li>● In accordance with 1002.33(6)(b)(2). F.S., “In order to ensure fiscal responsibility, an application for a charter school shall include a full accounting of expected assets, a projection of expected sources and amounts of income, including income derived from projected student enrollments and from community support, and an expense projection that includes full accounting of these costs of operation, including start-up costs.”             <ul style="list-style-type: none"> <li>○ The applicant fails to demonstrate fiscal responsibility as required by Florida law.</li> </ul> </li> </ul>	<p>Page 82</p> <p>Attachment X</p> <p>Attachment X</p> <p>Attachment X</p>
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**Conflicting Information Regarding Facility Expense**

<i>Term</i>	<i>Monthly Rent</i>
<i>Commencement Date to the last day of the First Lease Year</i>	<i>\$35,700.00</i>



<i>First day of the Second Lease Year to the Last day of the Second Lease Year</i>	\$54,166.67
<i>First day of the Third Lease Year to the Last day of the Third Lease Year</i>	\$55,791.67

Source: Attachment V

**Proposed Debt Service (Facility Rent) Chart**

Year	Page 103	Page 114	Budget (Attachment X)	Sample Draft Land and Building Lease Agreement (Attachment V)
1	\$270,533.00	\$225,000.00	\$225,000.00	\$35,700.00 month (\$428,400.00 annually)
2	\$531,410.00		\$337,500.00	\$54,166.67 month (\$650,000.04 annually)
3	\$678,275.00		\$450,000.00	\$55,791.67 month (\$669,5000.04 annually)
4	\$793,730.00		\$687,500.00	Does Not Provide Information
5	\$879,250.00		\$780,000.00	Does Not Provide Information

**Interview Question:**

1. The budget located in Attachment X includes revenue of \$250,000 for the Charter School Program grant (CSP) for the first two (2) years of operation. The CSP is a competitive grant and is not considered guaranteed income.
  - a. Please share why the CSP revenue is included in the proposed budget as revenue.

**Applicant's Response**

- a. Mr. Calkins acknowledges, "Uh, that is something we picked up after, after submittal and so, we have since fixed that. The finance team, as we were developing this, we've been getting, we had no problems getting the CSP.

So, uh, let me just answer it this way, Candy, it's probably the best way to do it. We don't anticipate having to use those funds. So, two (2) things in our budget real quick and I'm not sure if it will cover other questions, but I'll just tell you right now. When I met with our Underwriter, we are not going to have a debt service. So, you see a debt service for the first two (2) years. So, they're going to uh, they're, they're going to push our debt service off for year three (3) and then also project development fees, whatever we need to make sure that our budget is whole, that's what we'll use.

So, for the CSP that allocation we see there, if we don't get it, we'll take that out of the project development fee. And that's exactly how we built the middle school and that's why I think you see our budget so healthy. And I do like the fact that you talked about the fact that we have a sizable unrestricted fund balance. So, we do think that we do a good job with our budgets and so, what we do is we make sure that the budgets are healthy first and foremost. So, with the project development fees and the way that we work with the entire team is we realize that the school has to be healthy for us to be successful. So, that's why we do what we do. So, everybody's in it for the same, same purpose, same reason, same cause.

And so, we have a stricken, if you will, on that line item from our budget and we're going to be allocating project development fees in its place.”

**Notes:**

1. The budget already includes “*Project Advances from Development* revenue for \$75,000 for preplanning and \$275,000 for the first year of operation.
2. It is not clear if the applicant intends to utilize the recorded Project Advances from Development when stating, “...we have a stricken, if you will, on that line item (3250 CSP) from our budget and we're going to be allocating project development fees in its place.”
3. Please refer to the Budget Analysis below (District Attachments C – I):
  - Budget A – Proposed Budget Found in Attachment X.
  - Budget B – Proposed Budget Without Capital Outlay Funding. School is Not Eligible for Years One (1) and Two (2). Budget is Insolvent.
  - Budget C – Proposed Budget Without Capital Outlay and CSP Grant funding. The CSP Grant is a Competitive Grant; therefore, not Guaranteed Revenue. Budget is Insolvent. Please note that this page includes a chart of the adjusted expenses in the event the debt service is delayed for two (2) years, as indicated by the applicant at the capacity interview.
  - Budget D – Proposed Budget with Deleted Debt Service for First Two (2) Years of Operation. The Budget Includes Capital Outlay and CSP Grant funding.
  - Budget E – Proposed Budget with Deleted Debt Service and Capital Outlay funding.
  - Budget F – Proposed Budget with Deleted Debt Service, Capital Outlay, and CSP Grant funding. Budget is Insolvent.
4. Even if the underwriter is willing to delay payment of debt service for the first two (2) years of operation, as stated by Mr. Calkins at the capacity interview, the budget will not be solvent in the event the School does not receive the competitive CSP grant. The Capital Outlay

revenue is also deleted since the School does not qualify, as acknowledged by the applicant at the capacity interview.

<b>Interview Question:</b>
2. The budget located in Attachment X includes capital outlay funding for all five (5) years of operation. a. Please explain why you believe the high school will be eligible to receive capital outlay funding for the first two (2) years of operation. b. To the best of your recollection, did Navigator Academy of Leadership K-8 receive capital outlay funding for the first two (2) years of operation?
<b>Applicant's Response</b>
a. Mr. Calkins explains, "So, the short answer is it was under the parent company, originally. We realized that this is gonna be a new EIN. Umm, but the same answer applies. We don't think that we're gonna have capital outlay, but we do believe that with the project development fees that we'll be able to augment that particular line item, uh with, with those fees as a source of revenue."  b. Ms. Amato shares, "Perfect, because I believe if my memory serves you, the K-8 program was not eligible for capital outlay."  Mr. Calkins replies, "That's Correct. And we did it the same way, and so the methodology that we used umm, to help support our startup budget and is the same methodology we'll use now."

**Notes:**

1. The July 21, 2021 Board Meeting Minutes – Davenport include the following language under “Updates from Compass Charter Schools – ESP”

Section f – Capital Outlay

*Melissa shared that on the third year the school is eligible to receive capital outlay funds that can be anywhere between three to \$400,00 added to the school's budget. Jeremy spoke to our attorney doing the audit and he recommended that we earmark capital outlay funds for rent.*

The July 21, 2021 Minutes may be viewed at:

[https://www.dropbox.com/sh/9lykmgpwm7plelw/AABS7iv1FFfNMam\\_By4SYxC-a/002-Minutes-21.06.30.pdf?dl=0](https://www.dropbox.com/sh/9lykmgpwm7plelw/AABS7iv1FFfNMam_By4SYxC-a/002-Minutes-21.06.30.pdf?dl=0)

2. For the 2021 – 2022 school year (the third year of operation), Navigator Academy of Leadership received \$463,816 in Capital Outlay funding.

**2023 Navigator Academy of Leadership High School Davenport Final Edited 6/13/23**

Florida Department of Education Disbursement of Capital Outlay

2019-20

POLK DSB	530441	RIDGEVIEW GLOBAL STUDIES ACADEMY	201,905
POLK DSB	531601	BOK ACADEMY	304,708
POLK DSB	531621	EDWARD W BOK ACADEMY NORTH	206,475
POLK DSB	531682	MCKEEL ELEMENTARY ACADEMY	295,836
POLK DSB	531692	SOUTH MCKEEL ACADEMY	602,971
POLK DSB	538002	POLK PRE-COLLEGIATE ACADEMY	71,507
POLK DSB	538003	POLK STATE LAKELAND GATEWAY TO COLLEGE CHARTER H	122,949
POLK DSB	538004	NEW BEGINNINGS HIGH SCHOOL	524,938
POLK DSB	538005	MAGNOLIA MONTESSORI ACADEMY	51,941
POLK DSB	538031	ACHIEVEMENT ACADEMY	98,954
POLK DSB	538121	HARTRIDGE ACADEMY	104,090
POLK DSB	538131	POLK STATE COLLEGE COLLEGIATE HIGH SCHOOL	158,941
POLK DSB	538133	CHAIN OF LAKES COLLEGIATE HIGH	162,336
POLK DSB	538140	LAKELAND MONTESSORI MIDDLE SCHOOL	30,243
POLK DSB	538141	LAKELAND MONTESSORI SCHOOL HOUSE	61,283
POLK DSB	538142	BERKLEY ACCELERATED MIDDLE SCHOOL	240,001
POLK DSB	538143	VICTORY RIDGE ACADEMY	207,400
POLK DSB	538171	CYPRESS JUNCTION MONTESSORI	98,597
POLK DSB	538181	DISCOVERY HIGH SCHOOL	417,882

2020-21

POLK DSB	530441	RIDGEVIEW GLOBAL STUDIES ACADEMY	206,829
POLK DSB	531601	BOK ACADEMY	320,551
POLK DSB	531621	EDWARD W BOK ACADEMY NORTH	307,872
POLK DSB	531682	MCKEEL ELEMENTARY ACADEMY	301,485
POLK DSB	531692	SOUTH MCKEEL ACADEMY	604,018
POLK DSB	538002	POLK PRE-COLLEGIATE ACADEMY	76,502
POLK DSB	538003	POLK STATE LAKELAND GATEWAY TO COLLEGE CHAF	140,737
POLK DSB	538004	NEW BEGINNINGS HIGH SCHOOL	481,589
POLK DSB	538005	MAGNOLIA MONTESSORI ACADEMY	55,218
POLK DSB	538031	ACHIEVEMENT ACADEMY	100,448
POLK DSB	538121	HARTRIDGE ACADEMY	105,802
POLK DSB	538131	POLK STATE COLLEGE COLLEGIATE HIGH SCHOOL	168,789
POLK DSB	538133	CHAIN OF LAKES COLLEGIATE HIGH	165,267
POLK DSB	538140	LAKELAND MONTESSORI MIDDLE SCHOOL	14,157
POLK DSB	538141	LAKELAND MONTESSORI SCHOOL HOUSE	54,842
POLK DSB	538142	BERKLEY ACCELERATED MIDDLE SCHOOL	248,871
POLK DSB	538143	VICTORY RIDGE ACADEMY	215,371
POLK DSB	538171	CYPRESS JUNCTION MONTESSORI	97,776
POLK DSB	538181	DISCOVERY HIGH SCHOOL	466,360

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2021-22

POLK DSB	530441	RIDGEVIEW GLOBAL STUDIES ACADEMY	430,704
POLK DSB	531601	BOK ACADEMY	317,862
POLK DSB	531621	EDWARD W BOK ACADEMY NORTH	293,437
POLK DSB	531682	MCKEEL ACADEMY CENTRAL	301,683
POLK DSB	531692	SOUTH MCKEEL ACADEMY	603,323
POLK DSB	538002	POLK PRE-COLLEGIATE ACADEMY	72,762
POLK DSB	538003	POLK STATE LAKELAND GATEWAY TO COLLEGE CHARTER HI	124,254
POLK DSB	538004	NEW BEGINNINGS HIGH SCHOOL	496,848
POLK DSB	538005	MAGNOLIA MONTESSORI ACADEMY	77,002
POLK DSB	538007	NAVIGATOR ACADEMY OF LEADERSHIP DAVENPORT	463,816
POLK DSB	538031	ACHIEVEMENT ACADEMY	124,640
POLK DSB	538121	HARTRIDGE ACADEMY	107,635
POLK DSB	538131	POLK STATE COLLEGE COLLEGIATE HIGH SCHOOL	173,486
POLK DSB	538133	CHAIN OF LAKES COLLEGIATE HIGH	167,193
POLK DSB	538140	LAKELAND MONTESSORI MIDDLE SCHOOL	13,353
POLK DSB	538141	LAKELAND MONTESSORI SCHOOL HOUSE	60,357
POLK DSB	538142	BERKLEY ACCELERATED MIDDLE SCHOOL	252,356
POLK DSB	538143	VICTORY RIDGE ACADEMY	230,339
POLK DSB	538171	CYPRESS JUNCTION MONTESSORI	101,618
POLK DSB	538181	DISCOVERY HIGH SCHOOL	450,632

Florida Department of Education Disbursement of Capital Outlay

2019-20

<https://www.fldoe.org/core/fileparse.php/7716/urlt/19-20cod.xls>

2020-21

<https://www.fldoe.org/core/fileparse.php/7716/urlt/20-21cod.xls>

2021-22

<https://www.fldoe.org/core/fileparse.php/7716/urlt/21-22cod.xls>

2022-23

<https://www.fldoe.org/core/fileparse.php/7716/urlt/22-23cod.xls>

Capital Outlay Eligibility Requirements

<https://www.fldoe.org/schools/school-choice/charter-schools/business-finance-accounting/capital-outlay-funding.stml>

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Charter School Capital Outlay funds are annually allocated to eligible charter schools. To be eligible for funding a charter school must meet criteria 1a, 1b, 1c, 1d, or 1e, as well as criteria 2,3,4, and 5.

1. Have been in operation for 2 or more years;
  - a. Be governed by a governing board established in the state for two or more years which operates both charter schools and conversion charter schools within the state;
  - b. Be an expanded feeder chain of a charter school within the same school district that is currently receiving charter school capital outlay funds;
  - c. Be accredited by a regional accrediting association as defined by State Board of Education rule; or

Serve students in facilities that are provided by a business partner for a charter school-in-the-workplace pursuant to [s. 1002.33\(15\)\(b\)](#).

<b>Interview Question:</b>
3. The Navigator Academy January 11, 2023 Board Meeting Minutes (002) state under Old Business, “The 002 Middle School will lease part of the 003 building. Please indicate where this revenue source is located in the budget (Attachment X).”
<b>Applicant’s Response</b>
<p>Mr. Calkins asserts, “It's not the directly referenced and correct me if I'm wrong, but I think the way that we did this is indirectly referenced because we reduced the debt service, but that was actually before the meeting that I just had when I going to be having the debt service in the first couple of years. But we've, we've done it on a, a per student basis. So, what we did is the allocation is however many students we have from the middle school that we are using for the high school facility compared to the high school. That's how we'll determine what their fee is. And we also just to note too, currently the charter is, just so you know coming down the pipe, we have a thousand (1000 students) (inaudible) charter K-8. We find right now where we are right around eight hundred seventy-five (875), the budget works very, very well.</p> <p>So, we anticipate to be full. So, one hundred twenty-five (125) students, which isn't reflected in this budget right now, we can move to the new facility to help make that, umm, just put it in a better overall financial position.”</p> <p>Ms. Amato states, “OK. So, part of my, for whatever reason you were cutting in and out. So, let me make sure I can recap this correctly. So, currently you anticipate approximately one hundred (100,) moving, one hundred twenty-five (125) of the K-8 into the new building and then you will charge a per pupil fee to basically occupy that portion of the building.”</p> <p>Mr. Calkins replies, “That’s correct.”</p>

Ms. Amato asks, “OK. So, has that been reflected in the budget as revenue for the high school?”

Mr. Calkins answers, “It has not been. It's not been reflected as revenue in the budget. No, it has not. So, we just, what we did was, we reduced the, the debt service by that amount. And that was before I knew we, we could eliminate that altogether.”

**Notes:**

1. Navigator Academy of Leadership High School Davenport’s student population will serve six hundred fifty (650) students at its maximum enrollment in year five (5) of operation. The high school is not projected to reach eight hundred seventy-five (875) students, where the applicant claims the budget works very well. It is important to note that the high school expenses are very different than those at a K-8 school. Consequently, its breakeven point may be different.
2. The \$250,000 debt service included in the budget reflects the amount indicated on page one hundred fourteen (114) of the charter application, as well as on line item 9200 in the proposed budget. The District is unable to determine if the amount reflected in the budget is reduced to accommodate the revenue earned from leasing a part of the facility for middle school students.

**Interview Question:**

4. The budget (Attachment X) reflects revenue for the first year of operation for \$60,000:

*3495 – Other Miscellaneous Local Sources (Fundraisers, After School Programs, etc.)*

- a. Please explain what other miscellaneous local sources are included in this projected revenue?
- b. Please explain what after school programs are included in this projected revenue?

**Applicant’s Response**

a. Mr. Calkins affirms, “Yes, it's fundraisers, Boosterthon, sports programs. That's it.”

Ms. Amato states, “OK. So, by fundraisers kind of what, umm, the yard sales, the thrift sales, those types of things are what you were envisioning?”

Mr. Calkins replies, “Correct.”

b. Ms. LaFrance affirms, “Like, I think we can offer, besides the free tutoring that hopefully we will be able to get through grants, we can also offer different after school things like that of what's needed for our students.”

Ms. Amato asks, “So, students would pay for tutoring after school on campus?”

Ms. LaFrance replies, “Only if we don't receive the grants right now. Right now we offer the free tutoring at our schools through grants, so we're hoping to be able to do that again.”

Ms. Amato asks, “And then you mentioned something about sports, like a sports booster, our sports tickets. What was the sports piece?”

Ms. LaFrance responds, “Umm, what Jeremy mentioned was BoosterThon. So, what we do currently is we have two (2) very large fundraisers at our school this year. Our Davenport School brought in almost twenty thousand dollars (\$20,000) for us from BoosterThon. So, which was really nice for their first year. So, we plan on continuing that in order to get those types of funds.”

A description of the BoosterThon is provided, including examples of fundraising activities for elementary and middle school students.

**Notes:**

1. The proposed budget includes sixty thousand dollars (\$60,000) for year one (1) of operation and one hundred thousand dollars (\$100,000) for years two (2) through five (5) for line item 3495 – Other Miscellaneous Local Sources (Fundraisers, After School Programs). This is a substantial larger amount of projected revenue than the discussed fundraising efforts.
2. The applicant does not offer feasible opportunities to generate Other Miscellaneous revenue other than the discussed fundraising efforts. The after school tutoring will be free if the School is able to obtain grant funding. Therefore, it will not generate revenue.
3. The high school is projecting two hundred fifty (250) students, which is considerably fewer students to raise projected revenue than the referenced Navigator K-8 school.

**Interview Question:**

5. The proposed budget found in Attachment X includes a Technology Fee (\$150 per student).
  - a. Please provide clarification regarding this revenue source.
  - b. Are the students expected to pay this fee annually? If yes, please explain how the School will address students who are not able to afford such fees.

**Applicant’s Response**

- a. Mr. Calkins says, “Yeah, we're not requiring that. We're just asking that it donation so we don't have that anywhere as a revenue source within the budget. It would just augment the bottom line.”

Ms. LaFrance adds, “It's also something when we were doing research that we saw at many of our schools offering that. We do plan on the students having iPads, so that will help cover the cost of there is an issue with it. So, it is just something that we noticed at other schools while researching.”

Ms. Amato shares, “I'm just going to throw it out there. So, for example, Polk County is a one-to-one device and there are no fees associated with that. They do have the opportunity to purchase insurance should they lose their charging cord, should the screen break, should the keyboard fall apart, you name it, they're kids, they carry them around in their backpacks. Who knows what will happen? But then, if they, if they choose not to



purchase the insurance and they return the device broken or missing something, then there is a fee structure attached to that.

I do have reservations of putting a, even though Jeremy used the correct words, donation and optional, that, that is a significant price to pay. So, it might be something you consider looking into offering an insurance for that one-to-one device with the outlined expectation of if you return it without a charger, you're going to be charged \$25 or you return it with the screen broken. It's whatever the outlined is or you have the opportunity to purchase this insurance. It's relatively affordable. Obviously it's designed for schools because I understand where you're coming from, the one hundred fifty dollars (\$150.00) is gonna offset, you know, the update of the computer, the cleaning it, the all of those pieces, you know, refurbishing it to break it, make it new for next year. Umm, but that is a significant price and stipend for even a donation because if I saw that and it wasn't clear that it was a donation, I would have great reservation about enrolling my child when they can go down the street and get a device at no cost.”

Mr. Calkins responds, “Points well taken.”

Ms. Amato explains, “So, just finding a better way to approach and word that one hundred fifty dollars (\$150.00) technology fee might be up for a conversation with your Board on how you can approach that.”

Mr. Calkins and Ms. LaFrance respond, “Absolutely and great idea.”

b. Ms. Amato does not ask this question as it was discussed in previous response.

**Notes:**

1. The proposed budget found in Attachment X contains \$37,500 revenue for line item 3479 - Technology Fee (\$150 per student) contrary to Mr. Calkins stating that the Technology Fee is not stated anywhere as a revenue within the budget.
2. Consequently, the budget is negatively impacted without this revenue.

**Interview Question:**

6. The Charter Review Team needs to have a better understanding of the costs related to the building of the high school facility.

You state on page one hundred two (102) of the charter application, “The Board will engage the same facilities developer that constructed NAL-002in [SIC] order to design, plan, and construct facilities for lease, which are appropriate to the needs of NAL-003.” On page one hundred three (103) of the charter application you share, “All development expenses including, but not limited to; legal, engineering, permitting, interior renovation construction, site plan related expenses, and playground development are expenses agreed to by the facility’s developer/owner in exchange for a lease with the school tenant in the amounts described in the attached financial plan.”

Other references to the School leasing the high school facility can be found on page one hundred fourteen (114) of the charter application. You explain, “Deb [SIC] Service - 9200 – The school will be paying \$225,000 (projected) in rent the first year and will increase according to student growth as will be outlined in Lease Agreement (once available).”

However, Attachment T includes a letter dated September 2021 from DA Davidson in reference to Closed Bond Financing to Purchase Facility & Finance New High School Project. The letter states, “Navigator Academy of Leadership Davenport (the School) worked with D.A. Davidson & Co. (the Underwriter) to underwrite bonds and finance the purchase of their existing K-8 facility in Davenport and finance a high school expansion.” The letter also emphasizes that one of the key structural highlights of the School’s bond financing is the “Ability to finance up to \$12,500,000 for a high school expansion.”

- a. Can you please provide a detailed explanation as to how the building of the new high school will be funded? Specifically, will you be leasing the facility from a landlord or will you be financing the facility with revenue from tax-exempt revenue bonds issued on September 9, 2021?
- b. If you are going to be engaged in a lease for the new high school, can you please indicate which of the figures above accurately represent what the School will pay annually for the proposed facility? Can you also explain why the application contains inconsistent information regarding an anticipated lease agreement?
- c. If revenue from issued tax-exempt revenue bonds will be utilized to build the high school facility, please explain why this information was not outlined in the charter application. In accordance with the Navigator Academy of Leadership Davenport Independent Auditor’s Report for the fiscal year ended June 30, 2022, the Revenue Bonds Series 2021A, 2021B, and 2021C were issued on September 9, 2021, providing ample opportunity to enclose the information in the most recent high school charter application.
- d. Please share who will own the proposed high school facility.

### **Applicant’s Response**

- a. Mr. Calkins responds, “And all that has changed. I just, I’ll just tell you that all that’s changed. The 12.5 in the beginning, we were on a (interrupted to speak to a Navigator representative) that had a time limit to it. So, if we didn’t get it done, I can’t remember in within the first twelve (12) months, I think that bond went away for the expansion. So, what DA Davidson has done is they’ve given us a new letter with a guaranteed maximum price of fifteen (15) million, and that’s what we’re working off now, over a forty (40) year bond similar to what we’re doing now with where we’re going to push off those first two (2) years of payments to the end of the, to the end of the loan, until umm, the, the school’s mature is a little bit better.”

Ms. Amata states, “OK. So, so can you a provide us with the new letter from DA Davidson that outlines that because we obviously, the one we have is dated, the one we have is from 2021. So it’s already nearly two (2) years old, so if we could get.”

Mr. Calkins states, “You should have one from 2023 under one of the attachments too. It's sent on April 19th, 2023 and it should be in, umm and I can tell you where that it is in the Dropbox real quick. It should be there, but yes, they uh, I will resend it, but yes, they, they rewrote the letter in April.”

Ms. Amato asks, “And then, so is DA Davidson, are they the ones that have? Is that who you have the agreement with, with the debt services?”

Mr. Calkins replies, “That’s correct. They're the underwriter, and so the landlord is RoseMar (spelling?). They're the investment banker that holds the bonds and the, the Board is the owner. And that'll be the same. So, the school board, the school's board is the owner of the property.”

Ms. Amato asks, “So, you mentioned that they, your debt services has basically been kind of wiped clean for the first two (2) years. Is that notated in that letter from DA Davidson, or is that a new development?”

Mr. Calkins responds, “That is a new development. That happened when I was discussing, actually, when we saw, when I saw the CSP and the capital outlay and we were restructuring from the parent company to this new entity. So, I brought that up and they told me that they could eliminate that. So, I will, uh, that will have to be a new letter and I don't mind getting that.”

Ms. Amato answers, “That would be great. Just because that is a significant, you know, change in the budget and how things shake out at the end of the day. So, I do believe, I think we found that 2023 letter, I think it was attachment Z as in Zebra, I think a double check that umm, but yeah, okay perfect.”

Mr. Calkins explains, “And I have a meeting next Wednesday, Ashley, with the entire team. So, we'll talk about what it is that you guys need to make sure that we get it right over to you.”

Ms. Amato says, “Alright, so some of these questions then if you can provide the new information, if they, because obviously it's gonna be different than the chart that we have access to.”

Mr. Calkins maintains, “Correct. But, all in all, I mean, using our historical data like I said earlier, we expect that with the increase in construction costs, but not having the, but having a limited scope, that they should balance out. And so, we do anticipate that the costs are going to be very similar in the end. So, we, you know, we, we feel like based off that, that the numbers that you see in our in our budget will be in line with what, which is going to be in reality we just aren't going to be responsible for paying that debt service and first two (2) years.”

Ms. Amato states, “So, you kind of touched on it briefly. So, the high school's gonna be funded and you're kind, you're leasing the facility. Can you explain that to me one more time? So, who's leasing? The landlord would be?”

Mr. Calkins affirms, “No. So, the school’s board owns the facility just like they, they went through a forty (40) year bond. So, just like they own Navigator Academy in Davenport, they're gonna own NAL-003. And it will be the same. DA Davidson, they are the largest provider of bond financing in the country. They're, they're writing the deal and it will be the same bank that's holding, the, the, same investment bank that we used uh, for the K - 8 is going to be the same one that does this deal where the Board is the owner.”

b- c. Ms. Amato states, “OK. So, some of those questions A-D you have touched on, but I don't want to get into the weeds until we have the updated information. So, I'm gonna put a pen in that, in case we do have extra questions, we'll email those to you, Jeremy and the team, we don't have to do another capacity interview. But, some of that information does change, which is, I want to make sure we provide the most accurate information to reflect um, the budget component.”

Mr. Calkins replies, “Good. And if you and I'll just take these questions and I'll send it right to the under writer right after our meeting and so they'll know what it is that you guys are looking to get answered.”

**Notes:**

1. The application contains two (2) letters from D.A. Davidson. One letter is dated September 2021 (Attachment T) and the other is dated April 19, 2023 (Attachment Z).
2. The September 2021 letter states, “Navigator Academy of Leadership Davenport (the School) worked with D.A. Davidson & Co, (the Underwriter) to underwrite bonds and finance the purchase of their existing K-8 school facility in Davenport and finance a high school expansion. The financing closed in September 2021, with a committed draw down bond which guarantees (but does not obligate) the financing of the high school facility in an amount up to \$12,500,000.”
  - a. The September 2021 letter does not include a timeline for completion of the high school.
3. The April 19, 2023 letter expresses D.A. Davidson’s support of Navigator Academy of Leadership (NAL or the School). Also, included in this letter is the following:

*D.A. Davidson’s efforts will be on a best efforts basis and our underwriting is contingent upon completing the necessary due diligence, obtaining the necessary legal opinions and completing our internal cred commitment process. Tax-exempt bonds are sold in the capital markets and financing terms and interest rates change constantly. There can be no guarantee that financing will be available to the School. Nonetheless, in the current market we believe financing terms acceptable to the charter school could be achieved.*

- c. It is not clear if the new letter Mr. Calkins references was provided to the applicant subsequent to the submission of the charter application on April 24, 2023. If not, it is the District’s position that the letter should have been provided with the application. Furthermore, reference to the bond financing of the School should have been included in the application narrative.

**Interview Question:**

7. It is feasible that the proposed budget may be insolvent if the School does not receive the CSP competitive grant or the capital outlay funding for the first two (2) years of operation.
- a. Can you please explain what possible solution(s) the School can implement in the event it does not receive this revenue to ensure the budget is solvent?

**Applicant’s Response**

- a. Ms. Amato acknowledges, “And so you already talked about is it feasible that the proposed budget may be insolvent if the school does not receive the CSP competitive grant and capital outlay. You have addressed that because you will be, your debt services, um, has been wiped clean for, not clean, but has been postponed the first two (2) years.”

Mr. Calkins asserts, “And that's the word I was looking for.”

Ms. Amato shares, “Yeah, postponed. Okay. So, some of those budget questions, I know we may have more questions once we get that updated details so I appreciate the flexibility. So, we may shoot you a sidebar email. We won't need to have another capacity interview because it's only going to be on that component based on the new information.”

**Notes:**

1. Mr. Calkins states numerous times during the capacity interview that the Project Development Fees will be utilized to cure budgetary concerns. For example:

*We don't think that we're gonna have capital outlay, but we do believe that with the project development fees that we'll be able to augment that particular line item, uh with, with those fees as a source of revenue. And we did it the same way, and so the methodology that we used umm, to help support our startup budget and is the same methodology we'll use now.*

*So, they're going to uh, they're, they're going to push our debt service off for year three (3) and then also project development fees, whatever we need to make sure that our budget is whole, that's what we'll use.*

*So, for the CSP that allocation we see there, if we don't get it, we'll take that out of the project development fee. And that's exactly how we built the middle school and that's why I think you see our budget so healthy.*

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*So, with the project development fees and the way that we work with the entire team is we realize that the school has to be healthy for us to be successful. So, that's why we do what we do. So, everybody's in it for the same, same purpose, same reason, same cause.*

3. It is important to understand that the District does not have written evidence regarding the source and/or amount of Project Development Fees available to the School. The proposed budget includes \$350,000 in Project Advance from Development for pre-planning and the first year of operation.
  - a. The applicant must utilize additional project development fees to negate the budgeted \$137,135 for capital outlay in the first year of operation and \$205,703 for the second year.
  - b. The applicant will need to utilize additional project development fees to negate the budgeted \$250,000 the CSP Grant for the first two (2) years of operation in the event the School is not awarded the competitive grant.
4. The District is unable to substantiate Mr. Calkins reference to the utilization of project development fees as the methodology that resulted in Navigator K-8's healthy budget. The District is able to glean the following information from the Navigator Academy of Leadership (K-8) Independent Auditor's Reports for years ending June 30, 2020, 2021 and 2022 to support its current financial position.
  - a. It is clear that the debt service for Navigator Academy of Leadership (K-8) was not delayed for the first two (2) years as may be inferred by Mr. Calkins' statements at the capacity interview.

**Governmental Funds**

Year	Operation of Plant	Debt Service	Fund Balance	Unrestricted Fund Balance
<b>2020</b>	\$1,132,291		\$347,289	\$347,289
Principal		\$41,517		
Interest		\$13,721		
<b>2021</b>	\$1,531,692		\$929,719	\$929,719
Principal		\$46,463		
Interest		\$8,775		
<b>2022</b>	\$825,081		\$2,068,917	\$1,598,569
Principal		\$51,999		
Interest		\$3,228		
Debt Service Fund				\$1,439,786

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b. Factors for consideration to support Navigator Academy of Leadership (K-8)'s current financial status.

Date	Action	Amount	Comment/Source
May 5, 2020	Paycheck Protection Program (PPP) - CARES Act	\$915,613	School assigned \$236,983 of the total as of June 30, 2020. Loan repayment forgiveness in June 2021.
June 30, 2022	Proceeds from Debt Service	\$15,789,500	Year ending in June 30, 2022 Financial Audit
June 30, 2022	Facilities Acquisition & Construction	\$14,630,755	Year ending in June 30, 2022 Financial Audit

**DISTRICT ATTCHMENT C**

Navigator Academy of Leadership High School

Edited May 26, 2023

**BUDGET A: Proposed Budget (Attachment X)**

	Planning	Year 1	Year 2	Year 3	Year 4	Year 5
FEFP Calculations		\$ 1,685,064	\$ 2,509,909	\$ 3,344,143	\$ 4,120,040	\$ 4,299,783
Teacher Salary Increase Allocation		\$ 60,617	\$ 90,196	\$ 120,133	\$ 201,075	\$ 206,996
Teacher Lead		\$ 3,795	\$ 6,900	\$ 9,660	\$ 11,040	\$ 11,385
Capital Outlay		\$ 137,135	\$ 205,703	\$ 274,270	\$ 342,838	\$ 356,551
CSP		\$ 250,000	\$ 250,000	\$ -	\$ -	\$ -
NSLP & Lunch Collections		\$ 89,283	\$ 133,924	\$ 178,565	\$ 223,206	\$ 232,135
Technology Fee (\$150 per student)		\$ 37,500	\$ 56,250	\$ 75,000	\$ 93,750	\$ 97,500
Other Miscellaneous Local Sources		\$ 60,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Project Advance from Development	\$ 75,000	\$ 275,000	\$ -	\$ -	\$ -	\$ -
Total Revenue	\$ 75,000	\$ 2,598,394	\$ 3,352,882	\$ 4,101,771	\$ 5,091,949	\$ 5,304,350
Total Expenses	\$ 34,780	\$ 2,591,669	\$ 3,322,903	\$ 4,004,901	\$ 4,686,399	\$ 4,799,834
Net Revenue	\$ 40,220	\$ 6,725	\$ 29,979	\$ 96,870	\$ 405,550	\$ 504,516
Fund Balance	\$ 40,220	\$ 46,945	\$ 76,924	\$ 173,794	\$ 579,344	\$ 1,083,860

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**DISTRICT ATTCHMENT D**

Navigator Academy of Leadership High School

Edited May 26, 2023

**BUDGET B: Adjusted Budget Without Capital Outlay (Applicant States the School Will Not Receive During Capacity Interview)**

	Planning	Year 1	Year 2	Year 3	Year 4	Year 5
FEFP Calculations		\$ 1,685,064	\$ 2,509,909	\$ 3,344,143	\$ 4,120,040	\$ 4,299,783
Teacher Salary Increase Allocation		\$ 60,617	\$ 90,196	\$ 120,133	\$ 201,075	\$ 206,996
Teacher Lead		\$ 3,795	\$ 6,900	\$ 9,660	\$ 11,040	\$ 11,385
Capital Outlay		\$ -	\$ -	\$ 274,270	\$ 342,838	\$ 356,551
CSP		\$ 250,000	\$ 250,000	\$ -	\$ -	\$ -
NSLP & Lunch Collections		\$ 89,283	\$ 133,924	\$ 178,565	\$ 223,206	\$ 232,135
Technology Fee (\$150 per student)		\$ 37,500	\$ 56,250	\$ 75,000	\$ 93,750	\$ 97,500
Other Miscellaneous Local Sources		\$ 60,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Project Advance from Development	\$ 75,000	\$ 275,000	\$ -	\$ -	\$ -	\$ -
<b>Total Revenue</b>	\$ 75,000	\$ 2,461,259	\$ 3,147,179	\$ 4,101,771	\$ 5,091,949	\$ 5,304,350
<b>Total Expenses</b>	\$ 34,780	\$ 2,591,669	\$ 3,322,903	\$ 4,004,901	\$ 4,686,399	\$ 4,799,834
<b>Net Revenue</b>	\$ 40,220	\$ (130,410)	\$ (175,724)	\$ 96,870	\$ 405,550	\$ 504,516
<b>Fund Balance</b>		\$ (90,190)	\$ (265,914)	\$ (169,044)	\$ 236,506	\$ 741,022



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**DISTRICT ATTACHMENT E**

Navigator Academy of Leadership High School

Edited May 26, 2023

**BUDGET C: Adjusted Budget Without Capital Outlay and CSP Grant**

	Planning	Year 1	Year 2	Year 3	Year 4	Year 5
FEFP Calculations		\$ 1,685,064	\$ 2,509,909	\$ 3,344,143	\$ 4,120,040	\$ 4,299,783
Teacher Salary Increase Allocation		\$ 60,617	\$ 90,196	\$ 120,133	\$ 201,075	\$ 206,966
Teacher Lead		\$ 3,795	\$ 6,900	\$ 9,660	\$ 11,040	\$ 11,385
Capital Outlay		\$ -	\$ -	\$ 274,270	\$ 342,838	\$ 356,551
CSP		\$ -	\$ -	\$ -	\$ -	\$ -
NSLP & Lunch Collections		\$ 89,283	\$ 133,924	\$ 178,565	\$ 223,206	\$ 232,135
Technology Fee (\$150 per student)		\$ 37,500	\$ 56,250	\$ 75,000	\$ 93,750	\$ 97,500
Other Miscellaneous Local Sources		\$ 60,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Project Advance from Development	\$ 75,000	\$ 275,000	\$ -	\$ -	\$ -	\$ -
Total Revenue	\$ 75,000	\$ 2,211,259	\$ 2,897,179	\$ 4,101,771	\$ 5,091,949	\$ 5,304,350
Total Expenses	\$ 34,780	\$ 2,591,669	\$ 3,322,903	\$ 4,004,901	\$ 4,686,399	\$ 4,799,834
Net Revenue	\$ 40,220	\$ (380,410)	\$ (425,724)	\$ 96,870	\$ 405,550	\$ 504,516
Fund Balance		\$ (340,190)	\$ (765,914)	\$ (669,044)	\$ (263,494)	\$ 241,022

**Adjusted Expenses Without Debt Service for Two (2) Years**

	Year 1	Year 2
Total Expenses	\$ 2,591,669	\$ 3,322,903
Debt Service	\$ 225,000	\$ 337,500
Modified Expenses	\$ 2,366,669	\$ 2,985,403

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**DISTRICT ATTCHMENT F**

avigator Academy of Leadership High School

Edited May 26, 2023

**BUDGET D: Adjusted Budget With Deleted Debt Service for Two Years (With Capital Outlay and CSP Grant)**

	Planning	Year 1	Year 2	Year 3	Year 4	Year 5
FEFP Calculations		\$ 1,685,064	\$ 2,509,909	\$ 3,344,143	\$ 4,120,040	\$ 4,229,783
Teacher Salary Increase Allocation		\$ 60,617	\$ 90,196	\$ 120,133	\$ 201,075	\$ 206,996
Teacher Lead		\$ 3,795	\$ 6,900	\$ 9,660	\$ 11,040	\$ 11,385
Capital Outlay		\$ 137,135	\$ 205,703	\$ 274,270	\$ 342,838	\$ 356,551
CSP		\$ 250,000	\$ 250,000	\$ -	\$ -	\$ -
NSLP & Lunch Collections		\$ 89,283	\$ 133,924	\$ 178,565	\$ 223,206	\$ 232,135
Technology Fee (\$150 per student)		\$ 37,500	\$ 56,250	\$ 75,000	\$ 93,750	\$ 97,500
Other Miscellaneous Local Sources		\$ 60,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Project Advance from Development	\$ 75,000	\$ 275,000	\$ -	\$ -	\$ -	\$ -
Total Revenue	\$ 75,000	\$ 2,598,394	\$ 3,352,882	\$ 4,101,771	\$ 5,091,949	\$ 5,304,350
Total Expenses	\$ 34,780	\$ 2,366,669	\$ 2,985,403	\$ 4,004,901	\$ 4,686,399	\$ 4,799,834
Net Revenue	\$ 40,220	\$ 231,725	\$ 367,479	\$ 96,870	\$ 405,550	\$ 504,516
Fund Balance	\$ 40,220	\$ 271,945	\$ 639,424	\$ 736,294	\$ 1,141,844	\$ 1,646,360

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**DISTRICT ATTCHMENT G**

Navigator Academy of Leadership High School

Edited May 26, 2023

**BUDGET E: Adjusted Budget with Deleted Debt Service and Deleted Capital Outlay for Two Years**

	Planning	Year 1	Year 2	Year 3	Year 4	Year 5
FEFP Calculations		\$ 1,685,064	\$ 2,509,909	\$ 3,344,143	\$ 4,120,040	\$ 4,229,783
Teacher Salary Increase Allocation		\$ 60,617	\$ 90,196	\$ 120,133	\$ 201,075	\$ 206,996
Teacher Lead		\$ 3,795	\$ 6,900	\$ 9,660	\$ 11,040	\$ 11,385
Capital Outlay		\$ -	\$ -	\$ 274,270	\$ 342,838	\$ 356,551
CSP		\$ 250,000	\$ 250,000	\$ -	\$ -	\$ -
NSLP & Lunch Collections		\$ 89,283	\$ 133,924	\$ 178,565	\$ 223,206	\$ 232,135
Technology Fee (\$150 per student)		\$ 37,500	\$ 56,250	\$ 75,000	\$ 93,750	\$ 97,500
Other Miscellaneous Local Sources		\$ 60,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Project Advance from Development	\$ 75,000	\$ 275,000	\$ -	\$ -	\$ -	\$ -
Total Revenue	\$ 75,000	\$ 2,461,259	\$ 3,147,179	\$ 4,101,771	\$ 5,091,949	\$ 5,304,350
Total Expenses	\$ 34,780	\$ 2,366,669	\$ 2,985,403	\$ 4,004,901	\$ 4,686,399	\$ 4,799,834
Net Revenue	\$ 40,220	\$ 94,590	\$ 161,776	\$ 96,870	\$ 405,550	\$ 504,516
Fund Balance	\$ 40,220	\$ 134,810	\$ 296,586	\$ 393,456	\$ 799,006	\$ 1,303,522

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**DISTRICT ATTCHMENT H**

Navigator Academy of Leadership High School

Edited May 26, 2023

**BUDGET F: Adjusted Budget with Deleted Debt Service CSP Grant and Capital Outlay for Two Years**

	Planning	Year 1	Year 2	Year 3	Year 4	Year 5
FEFP Calculations		\$ 1,685,064	\$ 2,509,909	\$ 3,344,143	\$ 4,120,040	\$ 4,229,783
Teacher Salary Increase Allocation		\$ 60,617	\$ 90,196	\$ 120,133	\$ 201,075	\$ 206,996
Teacher Lead		\$ 3,795	\$ 6,900	\$ 9,660	\$ 11,040	\$ 11,385
Capital Outlay		\$ -	\$ -	\$ 274,270	\$ 342,838	\$ 356,551
CSP		\$ -	\$ -	\$ -	\$ -	\$ -
NSLP & Lunch Collections		\$ 89,283	\$ 133,924	\$ 178,565	\$ 223,206	\$ 232,135
Technology Fee (\$150 per student)		\$ 37,500	\$ 56,250	\$ 75,000	\$ 93,750	\$ 97,500
Other Miscellaneous Local Sources		\$ 60,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Project Advance from Development	\$ 75,000	\$ 275,000	\$ -	\$ -	\$ -	\$ -
Total Revenue	\$ 75,000	\$ 2,211,259	\$ 2,897,179	\$ 4,101,771	\$ 5,091,949	\$ 5,304,350
Total Expenses	\$ 34,780	\$ 2,366,669	\$ 2,985,403	\$ 4,004,901	\$ 4,686,399	\$ 4,799,834
Net Revenue	\$ 40,220	\$ (155,410)	\$ (88,224)	\$ 96,870	\$ 405,550	\$ 504,516
Fund Balance	\$ 40,220	\$ (115,190)	\$ (203,414)	\$ (106,544)	\$ 299,006	\$ 803,522

**DISTRICT ATTACHMENT I**

Academy of Leadership High School

Edited May 26, 2023

**Budget Notes:**

1. The budget DOES NOT reflect all of the projected staff listed on page eighty-two (82) of the charter application. Furthermore, it is debatable if the applicant allocates appropriate staffing to serve its ELL and ESE student populations.
2. The budget includes \$37,500 for the first year of operation for "Technology Fee" (\$150 per student). The applicant states at the capacity interview that the fee is a donation. Therefore, this funding cannot be considered guaranteed revenue.
3. The budget includes \$60,000 for the first year of operation for "Other Miscellaneous Local Sources (Fundraisers, After School Programs, etc.)." The applicant provides information at the capacity interview regarding a BoosterThon, which raised \$20,000. The only other potential revenue offered by the applicant includes revenue from After School Tutoring (if the School is unable to secure grant funding). Consequently, this revenue is not guaranteed and may be overstated.
4. The applicant states at the capacity interview that the School WILL NOT receive Capital Outlay funding until year three (3) of operation. It is important to note that Navigator Academy of Leadership Davenport K-8 did not receive Capital Outlay funding until year (3) of operation.
5. The applicant states at the capacity interview to strike the CSP line item from the budget and the School will be allocating project development fees in its place. The budget already includes "Project Advance from Development" for \$75,000 for pre-planning and \$275,000 for the first year of operation. It is not clear if the applicant intends to add additional project advance fees to the budget. The District does not have written documentaton to substantiate additional project development fees or the repayment stipulations for such fees.
6. The budget includes expenses for food in line items 5100, 6400, and 7100. The total amount for the first year is \$1,600 and increases to \$4,000 for year five (5). These expenses are not allowable for public education.
7. The Navigator Academy January 11, 2023 Board Meeting Minutes (002) state under Old Business, "The 002 Middle School will lease part of the 003 building." However, the applicant states at the capacity interview that this revenue is not reflected in the proposed budget. The applicant does not provide a monetary figure for this revenue. Consequently, the District is unable to modify the budget to include this revenue.
8. The budget includes Project Advance from Development for \$75,000 in preplanning and \$275,000 for the first year of operation. It is not clear how and when this money will be repaid to the Developer.
9. The applicant states on page one hundred thirteen (113) of the charter application, "... the ESP fees are variable and can be adjusted to provided for a healthy operating budget." The Compass Management Agreement, dated April 14, 2023, (Attachment CC) states on page eight (8), "Should the school's budget be restricted enough to possible be at a deficit, the ESP will work with the Board for fee forgiveness or fee deferral." The management fees projected are: (Year 1 - \$68,936, Year 2 - \$102,567, Year 3 - \$136,645, Year 4 - \$170,388 and Year 5 - \$177,784).
10. The applicant states on page one hundred fifteen (115) of the charter application, "The school has secured a loan in order to help with cash flow due to unexpectedly lower than projected enrollment..." The applicant does not provide evidence of the entity in which it has secured a loan with or the amount of the loan.

**DISTRICT ATTACHMENT J**

**COMPARISON OF 2021 AND 2023 NAVIGATOR ACADEMY OF LEADERSHIP HIGH SCHOOL BUDGETS**

1. The budgetary identified areas of concern contained in the 2021 Navigator Academy of Leadership High School denial letter include:
  - a. The applicant stipulates that the budget was created using the Charter Support Unit Budget Template and the most recent FEFP revenue estimator provided on the FLDOE Charter School website. It must be noted that the revenue for the proposed budget does not match the generated FTE reflected on the Estimate Revenue Worksheet, which is provided in the charter application. Therefore, the District is not able to verify the accuracy of the proposed revenue and/or reconcile the revenue reflected in these two (2) documents.
  - b. The budget includes \$350,000 in start-up revenue. Seventy-seven thousand dollars (\$77,000) of the start-up revenue is from unknown investors. The balance of the start-up revenue is guaranteed by Melissa Aguilar, ESP, and the governing board. The budget is not solvent the first year of operation without carry forward monies from the start up budget. The applicant does not accurately report all expenses depicted in the Start-Up Budget (Attachment S) in the Complete Budget (Attachment R). The correct cash balance for the planning year is \$127,748. The applicant reports the cash balance for the planning year in the Complete Budget as \$316,158. Consequently, this has a substantial negative impact on the budget.
  - c. Moreover, the proposed budget excludes numerous expenses critical to the function of the school. Consequently, the School will not be financially solvent for the first years of operation if these expenses, but not limited to, are accounted for: transportation; personnel key to the operation of the school; other support personnel for operation of plant; and high school clubs, sports, and activities germane to high school.
2. Although there are similar concerns identified in the high school's 2021 budget, the budget proposed for this application differs greatly in identified revenue sources. The following 2023 Navigator Academy of Leadership High School revenues sources are not found in the 2021 budget:
  - a. Capital Outlay for the first two (2) years of operation.
  - b. CSP Grant for the first two (2) years of operation.
  - c. Project Advance from Development for planning year and the first year of operation.

It is important to note that the identified 2023 revenue not included in the previous application submission equates to \$1,192,838. (The applicant includes revenue of \$350,000 in both budgets. However, the monetary figure is labeled differently – 2023 as Project Advance from Development and 2021 as Gifts, Grants and Bequests.). The identified 2023 revenue, excluding the \$350,000, equates to \$842,838 of unguaranteed revenue.

3. The 2021 Navigator Academy of Leadership High School budget includes expenses for substitute teachers. However, the 2023 budget does not include such expenses.

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4. Please see the Navigator of Academy High School 2021 budget below.

**DISTRICT ATTCHMENT K**

**Navigator Academy of Leadership High School  
Five Year Budget Projections  
Complete Budget - Polk County**

Func	Obj	Description	Plng Year	Year 1	Year 2	Year 3	Year 4	Year 5
		Enrollment Estimates		250 (of est. 250)	500 (of est. 500)	650 (of est. 650)	850 (of est. 850)	875 (of est. 875)
<b>Income Estimates</b>								
<b>FEFP Calculations</b>								
3310		FEFP - Base Funding		\$ 1,080,216	\$ 2,139,567	\$ 2,781,437	\$ 3,637,264	\$ 3,744,242
3310		FEFP - ESE Gurantee		\$ 31,240	\$ 62,480	\$ 81,224	\$ 106,216	\$ 109,340
3310		FEFP - Supplemental Academic Instruction		\$ 64,288	\$ 128,577	\$ 167,133	\$ 218,569	\$ 224,981
3310		FEFP - Discretionary Millage Compression		\$ 72,650	\$ 145,301	\$ 188,872	\$ 246,999	\$ 254,245
3310		FEFP - Digital Classroom Allocation		\$ 290	\$ 580	\$ 754	\$ 986	\$ 1,015
3310		FEFP - Safe Schools Allocations		\$ 13,172	\$ 26,343	\$ 34,243	\$ 44,781	\$ 46,095
3310		FEFP - Instructional Materials Allocation		\$ 19,912	\$ 39,824	\$ 51,765	\$ 67,697	\$ 69,683
3310		FEFP - Mental Health Assistance Allocation		\$ 8,355	\$ 16,710	\$ 21,721	\$ 28,406	\$ 29,239
3310		FEFP - Total Funds Compression Allocation		\$ 10,027	\$ 20,054	\$ 26,067	\$ 34,089	\$ 35,089
3310		FEFP - Reading Allocation		\$ 9,779	\$ 19,369	\$ 25,181	\$ 32,927	\$ 33,894
3310		FEFP - Teacher Salary Increase		\$ 39,218	\$ 77,678	\$ 100,984	\$ 132,048	\$ 135,927
3310		FEFP - Discretionary Local Effort		\$ 68,568	\$ 135,810	\$ 176,560	\$ 230,872	\$ 237,653
3355		FEFP - Class Size Reductions		\$ 222,558	\$ 440,818	\$ 573,063	\$ 749,390	\$ 771,431
3310		Teacher Lead Funds		\$ 1,625	\$ 3,625	\$ 4,750	\$ 6,125	\$ 6,250
<b>Other Income</b>								
3261		School Lunch Reimbursements	\$ -	\$ 56,601.00	\$ 113,202.00	\$ 147,162.60	\$ 192,443.40	\$ 198,401.40
3397		Capital Outlay Funds	\$ -	\$ -	\$ -	\$ 343,182	\$ 459,996	\$ 485,364
3440		Gifts, Grants and Bequests	\$ 350,000.00	\$ -	\$ -	\$ -	\$ -	\$ -
3451		School Lunch Collections	\$ -	\$ 10,800.00	\$ 21,600.00	\$ 28,080.00	\$ 36,720.00	\$ 38,016.00
<b>Total Income</b>				<b>\$ 350,000</b>	<b>\$ 1,709,299</b>	<b>\$ 3,391,538</b>	<b>\$ 4,752,179</b>	<b>\$ 6,225,529</b>

<b>Total Income</b>	<b>\$ 350,000</b>	<b>\$ 1,709,299</b>	<b>\$ 3,391,538</b>	<b>\$ 4,752,179</b>	<b>\$ 6,225,529</b>	<b>\$ 6,420,865</b>
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<b>Expense Estimates</b>								
<b>Function 5100 - Basic Instruction</b>								
5100	120	Classroom Teacher Salaries	\$ -	\$ 570,000	\$ 1,140,139	\$ 1,520,363	\$ 1,995,716	\$ 2,043,476
5100	130	Other Certified Staff Member	\$ -	\$ 45,000	\$ 92,510	\$ 92,521	\$ 92,531	\$ 92,542
5100	140	Substitute Teachers	\$ -	\$ 13,000	\$ 26,000	\$ 34,000	\$ 44,000	\$ 45,000
5100	210	Retirement	\$ -	\$ 19,154	\$ 38,321	\$ 50,118	\$ 64,863	\$ 66,339
5100	220	FICA	\$ -	\$ 47,048	\$ 94,298	\$ 123,386	\$ 159,751	\$ 163,405
5100	230	Group Insurance	\$ -	\$ 35,571	\$ 71,168	\$ 93,076	\$ 120,460	\$ 123,201
5100	240	Worker's Compensation	\$ -	\$ 7,688	\$ 15,408	\$ 20,161	\$ 26,103	\$ 26,700
5100	250	Unemployment Compensation	\$ -	\$ 2,808	\$ 5,616	\$ 7,344	\$ 9,504	\$ 9,720
5100	360	Rentals	\$ -	\$ 2,000	\$ 3,000	\$ 4,000	\$ 5,306	\$ 5,412
5100	510	Supplies	\$ -	\$ 9,125	\$ 19,625	\$ 26,850	\$ 36,725	\$ 39,500
5100	520	Textbooks	\$ -	\$ 26,875	\$ 88,721	\$ 60,272	\$ 186,243	\$ 133,343
5100	641	Furniture, Fixtures-Capitalized	\$ -	\$ 42,000	\$ 35,000	\$ 21,000	\$ 28,000	\$ 3,500
5100	644	Computer Hardware (Non Capitalized)	\$ -	\$ 50,625	\$ 73,663	\$ 61,879	\$ 69,700	\$ 46,425
5100	730	Dues and Fees	\$ -	\$ 125	\$ 255	\$ 338	\$ 451	\$ 474
5100	750	Other Personnel Services	\$ -	\$ 10,455	\$ 20,955	\$ 27,419	\$ 35,500	\$ 36,312
<b>5100 Sub Total</b>				<b>\$ -</b>	<b>\$ 881,473</b>	<b>\$ 1,724,679</b>	<b>\$ 2,142,726</b>	<b>\$ 2,874,854</b>
<b>Function 5200 - Exceptional Education</b>								
5200	130	Other Certified Staff Member	\$ -	\$ 47,500	\$ 142,516	\$ 142,532	\$ 190,064	\$ 190,086
5200	140	Substitute Teachers	\$ -	\$ 1,000	\$ 3,000	\$ 3,000	\$ 4,000	\$ 4,000
5200	210	Retirement	\$ -	\$ 1,474	\$ 4,423	\$ 4,423	\$ 5,898	\$ 5,898
5200	220	FICA	\$ -	\$ 3,634	\$ 10,902	\$ 10,904	\$ 14,540	\$ 14,542
5200	230	Group Insurance	\$ -	\$ 2,738	\$ 8,215	\$ 8,215	\$ 10,953	\$ 10,953
5200	240	Worker's Compensation	\$ -	\$ 594	\$ 1,781	\$ 1,782	\$ 2,376	\$ 2,376
5200	250	Unemployment Compensation	\$ -	\$ 216	\$ 648	\$ 648	\$ 864	\$ 864
5200	310	Professional and Technical Services	\$ -	\$ 9,360	\$ 19,094	\$ 24,345	\$ 32,282	\$ 32,928
5200	510	Supplies	\$ -	\$ 450	\$ 918	\$ 1,217	\$ 1,624	\$ 1,705
5200	750	Other Personnel Services	\$ -	\$ 808	\$ 2,423	\$ 2,423	\$ 3,231	\$ 3,231
<b>5200 Sub Total</b>				<b>\$ -</b>	<b>\$ 67,774</b>	<b>\$ 193,921</b>	<b>\$ 199,489</b>	<b>\$ 265,831</b>
<b>Function 6100 - Pupil Services</b>								
6100	130	Other Certified Staff Member	\$ -	\$ -	\$ 50,006	\$ 50,011	\$ 50,017	\$ 50,023
6100	210	Retirement	\$ -	\$ -	\$ 1,488	\$ 1,488	\$ 1,488	\$ 1,488
6100	220	FICA	\$ -	\$ -	\$ 3,825	\$ 3,826	\$ 3,826	\$ 3,827

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6100	230	Group Insurance	\$ -	\$ -	\$ 2,763	\$ 2,763	\$ 2,763	\$ 2,763
6100	240	Worker's Compensation	\$ -	\$ -	\$ 625	\$ 625	\$ 625	\$ 625
6100	250	Unemployment Compensation	\$ -	\$ -	\$ 216	\$ 216	\$ 216	\$ 216
6100	750	Other Personnel Services	\$ -	\$ -	\$ 850	\$ 850	\$ 850	\$ 850
<b>6100 Sub Total</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ 59,772</b>	<b>\$ 59,779</b>	<b>\$ 59,785</b>	<b>\$ 59,791</b>
<b>Function 6200 - Instructional Media Services</b>								
6200	510	Supplies	\$ -	\$ 1,125	\$ 2,295	\$ 3,043	\$ 4,059	\$ 4,262
<b>6200 Sub Total</b>			<b>\$ -</b>	<b>\$ 1,125</b>	<b>\$ 2,295</b>	<b>\$ 3,043</b>	<b>\$ 4,059</b>	<b>\$ 4,262</b>
<b>Function 6400 - Instructional Staff Training</b>								
6400	140	Substitute Teachers	\$ -	\$ 350	\$ 357	\$ 364	\$ 371	\$ 379
6400	310	Professional and Technical Services	\$ -	\$ 3,000	\$ 3,060	\$ 3,121	\$ 3,184	\$ 3,247
6400	330	Travel	\$ -	\$ 700	\$ 714	\$ 728	\$ 743	\$ 758
6400	510	Supplies	\$ -	\$ 500	\$ 510	\$ 520	\$ 531	\$ 541
<b>6400 Sub Total</b>			<b>\$ -</b>	<b>\$ 4,550</b>	<b>\$ 4,641</b>	<b>\$ 4,734</b>	<b>\$ 4,828</b>	<b>\$ 4,925</b>
<b>Function 6500 - Instructional-Related Technology</b>								
<b>6500 Sub Total</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ 17,858</b>	<b>\$ 29,622</b>	<b>\$ 29,625</b>	<b>\$ 29,628</b>
<b>Function 7100 - Board</b>								
7100	310	Professional and Technical Services	\$ 500	\$ 2,500	\$ 2,550	\$ 3,101	\$ 2,653	\$ 2,706
7100	320	Insurance and Bond Premiums	\$ -	\$ 8,750	\$ 18,025	\$ 24,135	\$ 32,509	\$ 34,469
<b>7100 Sub Total</b>			<b>\$ 500</b>	<b>\$ 11,250</b>	<b>\$ 20,575</b>	<b>\$ 27,236</b>	<b>\$ 35,162</b>	<b>\$ 37,175</b>
<b>Function 7200 - General / District Administration</b>								
7200	730	Dues and Fees	\$ -	\$ 82,095	\$ 81,418	\$ 81,418	\$ 81,417	\$ 81,415
<b>7200 Sub Total</b>			<b>\$ -</b>	<b>\$ 82,095</b>	<b>\$ 81,418</b>	<b>\$ 81,418</b>	<b>\$ 81,417</b>	<b>\$ 81,415</b>
<b>Function 7300 - School Administration</b>								
7300	110	Administrator Salaries	\$ 18,392	\$ 79,000	\$ 79,009	\$ 134,030	\$ 134,045	\$ 134,060
7300	160	Other Support Personnel	\$ 7,200	\$ 24,960	\$ 60,169	\$ 67,500	\$ 68,513	\$ 69,541
7300	210	Retirement	\$ 589	\$ 2,996	\$ 4,723	\$ 6,486	\$ 6,490	\$ 6,494
7300	220	FICA	\$ 2,062	\$ 7,953	\$ 10,647	\$ 15,417	\$ 15,496	\$ 15,575
7300	230	Group Insurance	\$ 1,094	\$ 5,564	\$ 8,772	\$ 12,046	\$ 12,053	\$ 12,061
7300	240	Worker's Compensation	\$ 337	\$ 1,300	\$ 1,740	\$ 2,519	\$ 2,532	\$ 2,545
7300	250	Unemployment Compensation	\$ 410	\$ 432	\$ 864	\$ 1,080	\$ 1,080	\$ 1,080
7300	310	Professional and Technical Services	\$ -	\$ 750	\$ 131,799	\$ 256,054	\$ 390,252	\$ 515,759
7300	360	Rentals	\$ -	\$ 5,500	\$ 11,000	\$ 14,300	\$ 19,635	\$ 20,213
7300	370	Communications	\$ -	\$ 1,813	\$ 3,698	\$ 4,903	\$ 6,540	\$ 6,867
7300	390	Other Purchased Services	\$ -	\$ 2,500	\$ 5,100	\$ 6,763	\$ 9,020	\$ 9,471
7300	510	Supplies	\$ -	\$ 5,500	\$ 11,220	\$ 14,878	\$ 19,845	\$ 20,837
7300	641	Furniture, Fixtures-Capitalized	\$ -	\$ 6,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
7300	644	Computer Hardware (Non Capitalized)	\$ 2,550	\$ 1,000	\$ 2,040	\$ 2,705	\$ 3,608	\$ 3,789
7300	730	Dues and Fees	\$ -	\$ 1,000	\$ 2,040	\$ 2,705	\$ 3,608	\$ 3,789
7300	750	Other Personnel Services	\$ 458	\$ 1,767	\$ 2,366	\$ 3,426	\$ 3,443	\$ 3,461
<b>7300 Sub Total</b>			<b>\$ 33,092</b>	<b>\$ 148,034</b>	<b>\$ 336,187</b>	<b>\$ 545,812</b>	<b>\$ 697,161</b>	<b>\$ 826,541</b>
<b>Function 7500 - Fiscal Services</b>								
7500	310	Professional and Technical Services	\$ -	\$ 10,100	\$ 10,302	\$ 10,508	\$ 10,718	\$ 10,933
<b>7500 Sub Total</b>			<b>\$ -</b>	<b>\$ 10,100</b>	<b>\$ 10,302</b>	<b>\$ 10,508</b>	<b>\$ 10,718</b>	<b>\$ 10,933</b>
<b>Function 7600 - Food Services</b>								
7600	160	Other Support Personnel	\$ -	\$ 6,624	\$ 13,447	\$ 13,648	\$ 20,780	\$ 28,122
7600	220	FICA	\$ -	\$ 507	\$ 1,029	\$ 1,044	\$ 1,590	\$ 2,151
7600	240	Worker's Compensation	\$ -	\$ 83	\$ 168	\$ 171	\$ 260	\$ 352
7600	250	Unemployment Compensation	\$ -	\$ 179	\$ 432	\$ 432	\$ 648	\$ 864
7600	570	Food	\$ -	\$ 51,840	\$ 103,680	\$ 134,784	\$ 176,256	\$ 181,872
7600	641	Furniture, Fixtures-Capitalized	\$ -	\$ -	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
7600	750	Other Personnel Services	\$ -	\$ 113	\$ 229	\$ 232	\$ 353	\$ 478
<b>7600 Sub Total</b>			<b>\$ -</b>	<b>\$ 59,345</b>	<b>\$ 119,984</b>	<b>\$ 151,311</b>	<b>\$ 200,886</b>	<b>\$ 214,839</b>
<b>Function 7900 - Operation of Plant</b>								
7900	160	Other Support Personnel	\$ -	\$ 22,880	\$ 33,251	\$ 33,750	\$ 44,588	\$ 45,257
7900	210	Retirement	\$ -	\$ 1,345	\$ 2,625	\$ 2,627	\$ 3,909	\$ 3,913
7900	220	FICA	\$ -	\$ 1,750	\$ 2,544	\$ 2,582	\$ 3,411	\$ 3,462
7900	230	Group Insurance	\$ -	\$ 2,498	\$ 4,874	\$ 4,879	\$ 7,260	\$ 7,266
7900	240	Worker's Compensation	\$ -	\$ 286	\$ 416	\$ 422	\$ 557	\$ 566
7900	250	Unemployment Compensation	\$ -	\$ 216	\$ 432	\$ 432	\$ 648	\$ 648
7900	320	Insurance and Bond Premiums	\$ -	\$ 9,000	\$ 21,630	\$ 25,462	\$ 34,749	\$ 35,791
7900	350	Repairs and Maintenance	\$ -	\$ 1,500	\$ 2,550	\$ 2,601	\$ 2,653	\$ 2,706
7900	360	Rentals	\$ 250	\$ 270,533	\$ 531,410	\$ 678,275	\$ 793,730	\$ 879,250
7900	370	Communications	\$ -	\$ 3,000	\$ 6,120	\$ 8,115	\$ 10,824	\$ 11,366
7900	380	Public Utilities	\$ -	\$ 3,000	\$ 6,120	\$ 8,115	\$ 10,824	\$ 11,366
7900	390	Other Purchased Services	\$ -	\$ 5,850	\$ 9,384	\$ 10,102	\$ 11,026	\$ 11,338
7900	430	Electricity	\$ -	\$ 16,500	\$ 39,270	\$ 45,778	\$ 61,868	\$ 63,106
7900	510	Supplies	\$ -	\$ 6,250	\$ 12,750	\$ 16,907	\$ 22,551	\$ 23,678
7900	680	Remodeling/Renovations	\$ -	\$ -	\$ -	\$ 5,100	\$ 5,202	\$ 5,306



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7900	750	Other Personnel Services	\$ -	\$ 389	\$ 565	\$ 574	\$ 758	\$ 769
<b>7900 Sub Total</b>			<b>\$ 250</b>	<b>\$ 344,997</b>	<b>\$ 673,941</b>	<b>\$ 845,720</b>	<b>\$ 1,014,558</b>	<b>\$ 1,105,787</b>
Reserve Fund			\$ -	\$ 41,047	\$ 81,418	\$ 105,844	\$ 138,409	\$ 142,477
<b>Total Expenses</b>			<b>\$ 33,842</b>	<b>\$ 1,651,790</b>	<b>\$ 3,326,992</b>	<b>\$ 4,267,022</b>	<b>\$ 5,477,080</b>	<b>\$ 5,679,498</b>

**Totals**

<b>Revenue</b>	<b>\$ 350,000</b>	<b>\$ 1,709,299</b>	<b>\$ 3,391,538</b>	<b>\$ 4,752,179</b>	<b>\$ 6,225,529</b>	<b>\$ 6,420,865</b>
<b>Expenses</b>	<b>\$ 33,842</b>	<b>\$ 1,651,790</b>	<b>\$ 3,326,992</b>	<b>\$ 4,267,022</b>	<b>\$ 5,477,080</b>	<b>\$ 5,679,498</b>
<b>Net Revenue</b>	<b>\$ 316,158</b>	<b>\$ 57,509</b>	<b>\$ 64,546</b>	<b>\$ 485,157</b>	<b>\$ 748,448</b>	<b>\$ 741,367</b>
<b>Cash Balance</b>	<b>\$ 316,158</b>	<b>\$ 373,667</b>	<b>\$ 438,213</b>	<b>\$ 923,370</b>	<b>\$ 1,671,818</b>	<b>\$ 2,413,185</b>

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**DISTRICT ATTCHMENT L**

Analysis of Employee Benefits – 2021 and 2023 Budgets

	Function	<b>2021 Budget</b>		<b>2022 Budget</b>	
		17 Employees		22 Employees	
				(Excluding Coaches)	
Retirement	5100	\$	19,154.00	\$	20,000.00
	5200	\$	1,474.00	\$	-
	6100	\$	-	\$	-
	7300	\$	2,996.00	\$	-
	7600	\$	-	\$	-
	7900	\$	1,345.00	\$	-
<b>Total Retirement</b>		<b>\$</b>	<b>24,969.00</b>	<b>\$</b>	<b>20,000.00</b>
FICA	5100	\$	47,048.00	\$	58,152.00
	5200	\$	3,634.00	\$	9,291.00
	6100	\$	-	\$	5,287.00
	7300	\$	7,953.00	\$	26,569.00
	7500	\$	-	\$	3,924.00
	7600	\$	507.00	\$	8,458.00
	7900	\$	1,750.00	\$	4,360.00
<b>Total FICA</b>		<b>\$</b>	<b>60,892.00</b>	<b>\$</b>	<b>116,041.00</b>
Group Insurance	5100	\$	35,571.00	\$	71,250.00
	5200	\$	2,738.00	\$	-
	6100	\$	-	\$	-
	7300	\$	5,564.00	\$	-
	7600	\$	-	\$	-
	7900	\$	2,498.00	\$	-
<b>Total Group Insurance</b>		<b>\$</b>	<b>46,371.00</b>	<b>\$</b>	<b>71,250.00</b>
Workman's Comp	5100	\$	7,688.00	\$	-
	5200	\$	594.00	\$	-
	6100	\$	-	\$	-
	7300	\$	1,300.00	\$	-
	7600	\$	83.00	\$	-
	7900	\$	286.00	\$	-
<b>Total Workman's Comp</b>		<b>\$</b>	<b>9,951.00</b>	<b>\$</b>	<b>-</b>
Unemployment Compensation					
	5100	\$	2,808.00	\$	-
	5200	\$	216.00	\$	-
	6100	\$	-	\$	-
	7300	\$	432.00	\$	-
	7600	\$	179.00	\$	-
	7900	\$	216.00	\$	-
<b>Total Unemployment Comp</b>		<b>\$</b>	<b>3,851.00</b>	<b>\$</b>	<b>-</b>
<b>Total</b>		<b>\$</b>	<b>146,034.00</b>	<b>\$</b>	<b>207,291.00</b>
Per Position		\$	8,590.24	\$	9,422.32

\$ 832.08

**Timeline of Events and Pertinent Information Regarding Budgetary Concerns**

1. The application contains a letter dated September 21, 2021 from DA Davidson in Attachment T.
  - a. It's important to note that the applicant does not reference the contents of the letter in the application narrative.
  - b. The letter is provided as **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).**
  - c. The letter states:
    - Navigator Academy of Leadership Davenport (the School) worked with D.A. Davidson & Co., (the underwriter) to underwrite bonds and finance the purchase of their existing K-8 school facility in Davenport and finance a high school expansion.*
    - The financing closed in September 2021, with a committed draw down bond which guarantees (but does not obligate) the financing of the high school facility in an amount up to \$12,500,000.*
2. The application contains a letter dated April 19, 2023 from DA Davidson in Attachment Z.
  - a. The letter is provided because **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.**
  - b. The applicant states on page one hundred thirteen (113) of the charter application, "NAL-003has [SIC] secured a MOU with DA Davidson for any needed financing if cash flow is short. These funds are in the amount of \$350,000 and will be divided between the pre-opening and first 2 years of the school. Additionally, the ESP fees are variable and can be adjusted to provide for a healthy operating budget. See Attachment Z for Evidence of External Funding."
  - c. The letter does not contain specific language regarding DA Davidson providing \$350,000 in the event financing is needed for a cash flow shortage.
  - d. The letter states:
    - Based on the School's leadership, demand profile, and enrollment plan, we expect that we will be able to underwrite tax-exempt bonds allowing NAL to bond finance the (i) acquisition of the existing facility, (ii) construction costs of building the high school facility, (iii) and fund predevelopment/contingency/FF&E/etc.*
    - There can be no guarantee that financing will be available to the School. Nonetheless, in the current market we believe financing terms acceptable to the charter school could be achieved.*
    - This letter does not serve as a commitment to underwrite.*
3. The Navigator Academy of Leadership High School charter school application is submitted to Polk County Public Schools on April 24, 2023.
4. There is evidence to suggest that the applicant was aware of its intent to utilize tax exempt bond financing to build the high school facility at the time of the submission of the Navigator Academy of Leadership High School charter school application.

- a. The September 14, 2021 Navigator Academy Board Meeting Agenda – Davenport minutes include the following:
  - *The Bond sale became a huge undertaking, but everything got done and closing took place. The expansion for the property was approved. The underwrite D.A. Davison was able to parlay the refinance of the facility as well as earmark money for the expansion. We are currently waiting for the approval of the charter High School. Wheel is in motion for the construction site. Construction process will commence once approval is in.*
  - *Robert Bivins reiterated that once the charter High School is approved, funding will be released.*
- b. The application narrative does not contain information regarding the plan to utilize tax exempt bonds to finance the high school to ensure that the District has a thorough understanding as to how the School planned to finance the new facility. Instead, the application contains conflicting information regarding debt service.

**Proposed Debt Service (Facility Rent) Chart**

Year	Page 103	Page 114	Budget (Attachment X)	Sample Draft Land and Building Lease Agreement (Attachment V)
1	\$270,533.00	\$225,000.00	\$225,000.00	\$35,700.00 month (\$428,400.00 annually)
2	\$531,410.00		\$337,500.00	\$54,166.67 month (\$650,000.04 annually)
3	\$678,275.00		\$450,000.00	\$55,791.67 month (\$669,500.04 annually)
4	\$793,730.00		\$687,500.00	Does Not Provide Information
5	\$879,250.00		\$780,000.00	Does Not Provide Information

5. The Navigator Academy of Leadership High School capacity interview meeting is conducted on May 16, 2023.
6. During the capacity interview meeting on May 16, 2023, the following information is discovered: (Excerpts from capacity interview. Please see evaluation document for entire dialogue.)

- a. In response to the question: The budget located in Attachment X includes revenue of \$250,000 for the Charter School Program grant (CSP) for the first two (2) years of operation. The CSP is a competitive grant and is not considered guaranteed income. Please share why the CSP revenue is included in the proposed budget as revenue.

Mr. Calkins acknowledges, “**Uh, that is something we picked up after, after submittal and so, we have since fixed that.** The finance team, as we were developing this, we've been getting, we had no problems getting the CSP. So, uh, let me just answer it this way, Candy, it's probably the best way to do it. We don't anticipate having to use those funds. So, two (2) things in our budget real quick and I'm not sure if it will cover other questions, but I'll just tell you right now. When I met with our Underwriter, we are not going to have a debt service. So, you see a debt service for the first two (2) years. So, they're going to uh, they're, they're going to push our debt service off for year three (3) and then also project development fees, whatever we need to make sure that our budget is whole, that's what we'll use.”

- b. In response to the question: Can you please provide a detailed explanation as to how the building of the new high school will be funded? Specifically, will you be leasing the facility from a landlord or will you be financing the facility with revenue from tax-exempt revenue bonds issued on September 9, 2021?

Mr. Calkins responds, “And all that has changed. I just, I'll just tell you that all that's changed. The 12.5 in the beginning, we were on a (interrupted to speak to a Navigator representative) that had a time limit to it. So, if we didn't get it done, I can't remember in within the first twelve (12) months, I think that bond went away for the expansion. **So, what DA Davidson has done is they've given us a new letter with a guaranteed maximum price of fifteen (15) million**, and that's what we're working off now, over a forty (40) year bond similar to what we're doing now with where we're going to push off those first two (2) years of payments to the end of the, to the end of the loan, until umm, the, the school's mature is a little bit better.”

- c. In response to clarifying question: So, you mentioned that they, your debt services has basically been kind of wiped clean for the first two (2) years. Is that notated in that letter from DA Davidson (referencing the April 19, 2023 letter), or is that a new development?”

Mr. Calkins responds, “**That is a new development. That happened when I was discussing, actually, when we saw, when I saw the CSP and the capital outlay and we were restructuring from the parent company to this new entity.** So, I brought that up and they told me that they could eliminate that. So, I will, uh, that will have to be a new letter and I don't mind getting that.”

7. Ms. Amato asks Mr. Calkins to provide the District with a new letter from D.A. Davidson, which specifies that the debt service will be postponed for the first two (2) years of operation, as stated by the applicant.
8. Mr. Calkins informs Ms. Amato that he has a meeting next Wednesday (May 24, 2023) with the underwriter.

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9. The Charter Review Team Meets on Thursday, May 25, 2023.
10. The District is informed that it will receive a new letter from D.A. Davidson on Friday, May 26, 2023.
11. The District receives a letter from D.A. Davidson dated May 26, 2023 on Tuesday, May 30, 2023. (See below.)

## 2023 Navigator Academy of Leadership High School Davenport Final Edited 6/13/23

May 26, 2023



To: Whom it May Concern  
From: Maggie Mirsky, Senior Vice President, D.A. Davidson & Co.

Re: Tax-exempt bond financing

We are writing to express our support of Navigator Academy of Leadership High School (NAL or the School). D.A. Davidson is the leading charter school bond underwriter in the United States according to the Local Initiative Support Corporation, having underwritten more charter school bond issuances than any other firm. D. A. Davidson has underwritten over 350 charter school bond financings totaling more than \$5.6 billion since 1998. We have financed charter schools ranging from start-ups to decades old schools and are keenly aware of a charter school's marketability in the bond market.

Based on the School's leadership, demand profile, and enrollment plan, we expect that we will be able to underwrite tax-exempt bonds allowing NAL to bond finance the (i) construction costs of building the new approx. 60,000 sf two-story facility (ii) and fund reserve funds, capitalized interest, and costs of issuance, as needed.

We have a sound understanding of NAL's financing goals and objectives and will craft a plan of finance accordingly. Some structural elements we are exploring that result in reduced annual facility expense include interest only periods (partial payment deferral), funded capitalized interest, draw down bonds, and extended amortizations.

D.A. Davidson's efforts will be on a best efforts basis and our underwriting is contingent upon completing the necessary due diligence, obtaining the necessary legal opinions and completing our internal credit commitment process. Tax-exempt bonds are sold in the capital markets and financing terms and interest rates change constantly. There can be no guarantee that financing will be available to the School. Nonetheless, in the current market we believe financing terms acceptable to the charter school could be achieved.

Please note that this letter does not represent advice nor is it a recommendation to buy or sell securities by D.A. Davidson. This letter does not serve as a commitment to underwrite.

Please call or e-mail us if you have any questions.

Sincerely,

Maggie Mirsky  
Senior Vice President  
D.A. Davidson & Co.

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1550 Market Street, Suite 300  
Denver, CO 80202  
[www.davidsoncompanies.com/ficm](http://www.davidsoncompanies.com/ficm)  
D.A. Davidson & Co. member SIPC

- a. Please note that the letter does not stipulate that Navigator Academy of Leadership High School will not have debt service postponed until year three (3).

b. The letter states:

- Based on the School's leadership, demand profile, and enrollment plan, we expect that we will be able to underwrite tax-exempt bonds allowing NAL to bond finance the (i) construction costs of building the new approx.. 60,000 sf two-story facility (ii) and fund reserve funds, capitalized interest, and costs of issuance, as needed.*
- We have a sound understanding of NAL's financing goals and objectives and will craft a plan of finance accordingly. Some structural elements we are exploring that result in reduced annual facility expense include interest only periods (partial payment deferral), funded capitalized interest, draw down bonds, and extended amortizations.*
- There can be no guarantee that financing will be available to the School.*
- Nonetheless, in the current market we believe financing terms acceptable to the charter school could be achieved.*
- This letter does not serve as a commitment to underwrite.*

12. Ms. Amato takes not action based on the contents of the letter. The Charter Review Team's recommendation to deny Navigator Academy of Leadership is presented to the Superintendent and Board members at the June 13, 2023 workshop.

Summary:

It is obvious that the applicant took actions to remedy the budget concerns subsequent to the submission of the charter application on April 24, 2023. It is important to note that the District made an earnest attempt to acquire additional information to ensure that the District had the most accurate budget information.

However, the D.A. Davidson letter provided to the District on May 30, 2023 **does not** provide a written guarantee that the debt service for Navigator Academy of Leadership High School will be postponed for two (2) years as implied by the applicant at the Capacity Interview.

The presented budget includes unguaranteed revenue such as capital outlay funds, the CSP grant (competitive), technology fee, and other miscellaneous local sources (fundraisers, after school programs, etc.). The proposed budget already includes \$350,000 for Project Advance from Development for preplanning and the first year of operation. The proposed budget is insolvent simply by the elimination of the capital outlay funds for the first two (2) years (\$137,135 year one and \$205,703 year two) and without taking into consideration the other unguaranteed revenue and identified staffing concerns.

Lastly, pursuant to §1002.33(6)(b)(2), Florida Statutes, the applicant fails to adequately include an expense projection that includes full accounting of the costs of operation to ensure fiscal responsibility. In accordance with §1002.33(6)(a)(5), Florida Statutes, the applicant fails to provide an adequate annual financial plan for each year requested by the charter for operation of the school for up to five (5) years.



**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
<ul style="list-style-type: none"> <li>• The applicant shares, “NAL003 Governing Board has the ultimate responsibility to ensure that the finances are managed properly.”</li> </ul>	Page 116
<ul style="list-style-type: none"> <li>• The applicant explains, “The Governing Board of NAL-003 has adopted a financial responsibilities handbook that was created to further safeguard its finances.”</li> </ul>	Page 116
<ul style="list-style-type: none"> <li>• The applicant states, “NAL will maintain both student and financial records in accordance with Chapter 119 of Florida Statutes. Retention schedules established by the records and information management program of the Division of Library and Information Services of the Department of State will be followed.”</li> </ul>	Page 120
<ul style="list-style-type: none"> <li>• The applicant affirms, “NAL-003 will maintain insurance coverage limits that either meet or exceed the District minimum insurance limit requirements.”</li> </ul>	Page 120

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

**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
<ul style="list-style-type: none"> <li>• The applicant provides a thoughtful and realistic implementation plan that covers major operational items and provides flexibility for addressing unanticipated events.</li> </ul>	Pages 122 - 123

Concerns and Additional Questions	Reference

**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"/>

Strengths	Reference
Not Applicable.	

Concerns and Additional Questions	Reference

**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.

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

Strengths	Reference
Not Applicable.	

Concerns and Additional Questions	Reference

**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.

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

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant acknowledges, “NAL-003, a non-profit Florida corporation, is the legal entity that will operate the</li> </ul>	Addendum B

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charter school as per the <i>Articles of Incorporation</i> , (Attachment H) and <i>Bylaws</i> (Attachment J)	
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<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.

Strengths	Reference
<ul style="list-style-type: none"> <li>• The applicant submits the required documents.</li> </ul>	Attachment BB

Concerns and Additional Questions	Reference