

**Berkley  
Accelerated  
Middle School  
Charter Application**

Submitted to the Polk County School Board  
Polk County, Florida  
September 1, 2003

## **I. ACADEMIC DESIGN**

### **1. Guiding Principles, Purpose, & Mission**

#### **A. Core Philosophy**

1. At Berkley Accelerated Middle School (BAMS), it is our goal to provide all students the opportunities and supports they need to achieve at world class levels and to provide all teachers with the training and support they need to deliver standards-based instruction in every lesson, every day. Our aim is to have every 8<sup>th</sup> grader studying algebra, reading and analyzing great literature, performing hands-on science experiments, and interpreting original documents from our nation's history in order to give all of our students the foundation to follow any educational path they choose;
2. To continue and enhance the scholastic momentum already firmly established during elementary years at Berkley Elementary Charter School and documented through state assessment testing means thereby continuing the commitment to high academic standards for ALL students based upon their individual abilities;
3. To maintain and continue to strengthen the already firmly established peer bonds of students currently enrolled at Berkley Elementary Charter School during their important developmental middle school years;
4. To provide greater community ownership in a local middle school with a diverse student body and increased parental support and input into academics, discipline, and mentoring;
5. To offer a small school that promotes a safe, secure, nurturing learning environment for a maximum of 600 middle school students at capacity, and to reduce the burden on existing middle schools in the area;
6. To offer strong after-school programs including, but not limited to, extramural competitive sports, special interest groups, study groups and club activities;
7. To offer summer remedial programs to any students who need additional help in reaching their potential, as well as for students who would like to strengthen existing skill level within particular core subject areas.

#### **B. The Guiding Principles**

Berkley Accelerated Middle School will utilize the Guiding Principles found in s.1002.33(2)(a) in many ways.

1. BAMS will meet high standards of student achievement while providing parents flexibility to choose among diverse educational opportunities within the state's public school system. Parents will be choosing an accelerated course of study for their children. They will choose this course of study because of the standards-based curriculum and supports that will be in place to help all students perform at high levels. The Talent Development Middle School model that will be used contains eight fundamental components that transform a school into a high performance learning community by establishing the standards-driven curriculum, instruction, school organization, and

professional development needed in order for all students to learn challenging academic materials and to prepare for successful futures. Effective Schools Research states that growing evidence shows “that small schools offer a setting that can accommodate and build in much of what educational research is recommending.” In fact, there is a striking parallel between the characteristics of small schools and the correlates of effective schools. Small schools “offer what is perhaps our most promising single strategy for realizing a number of the goals of current reformers - including new governance and accountability arrangements, personalization and individualization, strong professional communities, authentic instruction and engagement”.

2. Berkley Accelerated Middle School will “promote a genuine and lasting achievement for a great many more youngsters through enhanced academic success and financial efficiency by aligning responsibility with accountability”. BAMS will improve student learning and instruction by implementing an integrated set of standards-based instructional materials, effective instructional practices, assessments and performance standards along with focused and sustained staff development and in-classroom implementation support for each of the four major subject areas. These changes will provide all students with a strong opportunity to learn. In addition, the organization of the school will provide all students with a motivation to learn. This organization will include small learning communities and teacher teams, an elective replacement approach to extra help, increased parental and community involvement, and linking middle school to post-secondary schooling and the world of work. As part of these reforms, teachers will take on new instructional roles by setting and communicating high standards for all students, acting as coaches and mentors as well as instructors, and providing high quality standards-driven instruction based on best practices.

3. Berkley Accelerated Middle School will provide parents with sufficient information on whether their child is reading at grade level and whether the child gains at least a year’s worth of learning for every year spent in the middle school. Students will be assessed formally every nine weeks in reading, writing, mathematics, science, and history. Student progress will be graphed to provide a visual representation on academic progress for the student, parents, and teacher. This and other information will be provided by the school as additional information to be sent home with the report card. There will be a clear curriculum alignment. The Comprehensive Core Curriculum which includes the Sunshine State Standards will be aligned with the school assessments. Berkley Accelerated Middle School will participate in the FCAT Reading, Writing, and Mathematics. Student test score data will be used in the school improvement plan.

Technology will be utilized to monitor on-going mastery of the Comprehensive Core which includes the Florida State Benchmarks and to make immediate corrections in the student learning path. The primary focus is prevention rather than remediation.

Baseline data will be gathered during the first four weeks using both technology and non-technology based assessment instruments such as Accelerated Reading, STAR, Edu-test, and Compass Learning Assessment. Students will progress at a greater rate than during their previous school year as demonstrated by the data collected from state testing during the 2004-2005 school year.

In the fall of the first year, assessments will be given in reading, writing, and mathematics to establish the incoming baseline of achievement on each student. FCAT student scores from the school district will be obtained for the previous year. A combination of school-wide assessments and FCAT scores will establish a baseline of achievement. Student success will be evidenced by an increase in student performance as reported by school-wide assessments and/or criterion-referenced tests such as FCAT scores. Berkley Accelerated Middle School will meet or exceed the district average FCAT scores. Parents will be informed regularly through the above-mentioned methods to ensure sufficient information on whether their child is reading at grade level and whether the child gains at least a year's worth of learning.

### **C. The Prescribed Purposes**

Berkley Accelerated Middle School will meet the Prescribed Purposes of a charter school found in s.1002.33(2)(b).

1. BAMS will improve student learning and academic achievement. Many middle schools inadvertently manufacture the low achievement of many students by offering high expectations instructions to only a subset of their students (sorting some students into high-expectations instruction while relegating others to a lower track featuring a lower-quality education.) Berkley believes that all students are capable of succeeding in demanding college-preparatory courses when given appropriate support. Because tracking causes gross inequalities in students' access to knowledge, instructional resources, and well-qualified teaching, BAMS students will be heterogeneously grouped for core academic classes. Heterogeneous grouping for core academic classes will help the school reach high levels of academic performance by eliminating nightmare sections: Those lower track sections that no one wants to teach and that typically feature a slow pace and dumbed-down content. To help teachers manage these heterogeneous classes effectively and teach in ways that help students learn, the staff will be provided with focused and coherent professional development in the use of subject-specific cooperative learning and teaching-for-understanding instructional methods and classroom management techniques designed for diverse classrooms. By combining heterogeneous classrooms with effective cooperative approaches that feature guided peer-tutoring and peer discussion of high-level content, BAMS will cultivate the conceptual "learning for all students".

2. BAMS will increase learning opportunities for all students with special emphasis on low-performing students and reading. Students who need extra help in math or reading will attend a ten-week accelerated learning class (in addition to their regular math and reading classes) that uses cooperative groups and computers to provide intensive learning experiences. Students needing extra help to meet high standards have responded enthusiastically to these "extra dose" classes even though the students miss an elective class for ten weeks in order to participate. These extra-dose classes help make detracking work well because the teachers of the regular classes feel no pressure to "dumb down" or "slow down" the curriculum: The teachers know that intensive extra help will be received by all students who need additional time and instruction to master the material. Parents are supportive because they know their children are getting the extra help needed to perform at higher levels and are not being left behind.

3. BAMS will create new professional opportunities for teachers, including ownership of the learning program at the school site. Berkley is committed to ongoing planning and professional development needed to implement and sustain the core components of the Talent Development model. Professional development services include initial planning meetings, and follow-up on-or off-site training. School-based teachers and administrators will work with classroom teachers to develop capacity within the school and at the classroom level. Additional support will be provided to these school-based coaches through on-site follow-up visits and regular phone and electronic contact with University-based facilitators from Johns Hopkins University. Professional development is collaboratively planned and is based on identified needs. Another layer of support is non-evaluatory in-classroom implementation assistance provided by a curriculum coach who performs a wide range of support functions including modeling, troubleshooting, helping the teacher customize the curriculum to his or her classroom, and making sure the teacher has all the materials he or she needs.

4. BAMS will encourage the use of innovative learning methods. These innovative learning methods include cooperative learning structures used in all curriculum. The Talent Development Middle School model provides the curriculum, professional development, coaching, implementation support, capacity building, and structural and organizational reforms needed to spread excellence in teaching to every class in every major subject at every grade level.

5. BAMS will require the measurement of learning outcomes. Students will be assessed formally every nine (9) weeks in reading, writing, mathematics, science, and history. This and other information will be provided by the school as additional information to be sent home with the report card. There will be a clear curriculum alignment. The Comprehensive Core Curriculum that includes the Sunshine State Standards will be aligned with the school assessments. Berkley Accelerated Middle School will participate in the FCAT Reading, Writing, Science and Mathematics. Student test score data will be used in the school improvement plan. Berkley will meet the Annual Yearly Progress stated in the No Child Left Behind Legislation.

#### **D. Optional Purposes**

Berkley Accelerated Middle School will fulfill the Optional Purposes of charter schools found in s.1002.33(2)(c).

1. Berkley will use innovative measurement tools. Edu-test assessments will be used to identify student's strengths and weaknesses in order for teachers to alter instruction to meet individual needs immediately. This will enable the "extra dose" classes to take on more meaning in that teachers will know the needs of students immediately.

2. BAMS will provide rigorous competition within the public school district to stimulate continual improvement in all public schools. Parents, students, and teachers will have a highly academic learning community in which to foster high academic standards that will be a standard at which other schools in the area will want to emulate.

3. BAMS will expand the capacity of the public school system. BAMS will serve up to 600 middle school students at capacity. Due to the enormous growth in the Auburndale / Polk City area, BAMS will help alleviate overcrowding in area schools. This growth is demonstrated by two large housing developments currently in the planning stage. One is for 400+ single-family homes that will be located next to the middle school (Berkley Point Preserve) and another development of 400+ single-

family homes located south of 559A along the shoreline of Lake Tennessee and Lake Juliana. Additional long-term growth will be taking place in this area when the University of South Florida begins construction and holding class at their proposed new location approximately two miles from Berkley Charter Elementary School.

### **E. Target Population**

The proposed Berkley Accelerated Middle School will be open to all grade-appropriate students in Polk County who would like to benefit from an innovative educational program offered in a safe and enriching environment. Berkley will serve approximately 100 6<sup>th</sup> grade students in the 2004-2005 school year, 200 6<sup>th</sup> and 7<sup>th</sup> grade students in the 2005-2006 school year, 400 students in grades 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> in the 2006-2007 school year, and meet a maximum enrollment of 600 students in grades 6<sup>th</sup>-8<sup>th</sup> in the 2008-2009 school year. Any student residing in Polk County is eligible to attend if he/she submits a timely application. Transportation will be provided within the present Berkley Elementary Charter School transportation lines. The proposed charter school will serve students of an equal to or more diverse population than the racial, ethnic, and socio-economic backgrounds currently representative of existing local charter school, Berkley Elementary Charter School.

## **2. Educational Program**

### **A. Curriculum Overview**

The Talent Development Middle School model contains eight fundamental components that transform a school into a high performance learning community by establishing the standards-driven curriculum, instruction, school organization, and professional development needed in order for all students to learn challenging academic materials and to prepare for successful futures. Key elements of the reform include:

- **Student Team Literature**, an innovative, thoroughly tested, and highly effective cooperative learning approach to teaching and learning in Reading, English, and Language Arts.
- **A research and standards-based mathematics curriculum** built around materials developed by the University of Chicago School Mathematics Project. The Talent Development Middle School Mathematics Program blends skill building with problem solving and is designed to enable all students to succeed in algebra in eighth grade.
- **A hands-on inquiry-oriented science curriculum** linked to state and national standards and benchmarks.
- **A U.S. history course** built around Joy Hakim's award winning multicultural narrative *A History of U.S.* series.
- **A Climate program** that addresses appropriate reinforcements for positive behavior and intervention plans to reduce negative behavior in and out of classroom settings.
- **Extra help programs** in mathematics and / or reading for students who need it in order to succeed at the challenging learning tasks they face.
- **Innovations in school organization** that allow teachers, students, and families to establish strong bonds and close, caring relationships.
- **A three-year career and education exploration course** for sixth, seventh, and eighth

graders.

- **The Partnership Schools model** for establishing strategic school-family-community partnerships.
- **Focused and sustained professional development** in reading/English/language arts, mathematics, science, and U.S. history with follow-up in-school support by highly trained facilitators.

The instructional programs are implemented school wide and across all grades in each major subject area. In each of these areas, the curriculum emphasizes active learning, the acquisition of essential foundational knowledge, and the development of higher order competencies. The demanding curriculum is supported by high-caliber, curriculum-specific professional development enabling teachers to ensure that students attain the Sunshine State Standards.

**Reading/English/Language Arts** -(RELA) curriculum includes Student Team Literature, Talent Development Writing, plus an extra-help program called Computer- and Team- Assisted Reading Acceleration that provides additional instruction and reading opportunities for struggling students. The TDMS RELA program represents a coherent research- and standards-based approach to developing the literacy of older students. The program teaches effective reading strategies and operations, extends reading comprehension skills, develops fluency in reading and writing, systematically adds important words to students' working vocabulary, and builds both basic language skills and higher-order thinking, literary analysis, and writing skills. One of the distinctives of this approach is its integrated nature. Skills are not taught in isolation. All objectives in RELA are taught through reading, studying, discussing, and responding to high-quality, high-interest books.

The TDMS RELA program includes a wide variety of curricular materials that support teachers' use of effective instructional practices, engaging and varied learning activities and assessments, and students' use of effective peer assistance processes. A primary tool in the TDMS RELA program is the Partner Discussion Guide, which structures the teachers', and students' teaching and learning activities. Partner Discussion Guides are available for almost 200 books (fiction and nonfiction books from every genre, biographies, and collections of short stories or poems)

**Mathematics Program** – The TDMS mathematics program is centered on the use of curricular materials developed by the University of Chicago School Mathematics Project (UCSMP). These are research- and standards-based materials, which are particularly well suited to master algebra proficiency for all in 8<sup>th</sup> grade.

**Science Program** – The Talent Development science staff helps schools take advantage of the recent developments occurring in science education by: (a) working with the science faculty of each Talent Development School to modify its curriculum so that it becomes aligned with the state and national science standards and benchmarks developed by the National Science Foundation and the American Association for the Advancement of Science, (b) providing professional development, and (c) working with teachers to implement effective new science modules especially those developed by the Full Option Science System (F.O.S.S).

**U.S. History Program** – The Talent Development Middle School’s U.S. History program includes: (a) a coherent, comprehensive set of lesson plans designed to assist all students in understanding the most important primary sources of information about American History, such as the Declaration of Independence and the U.S. Constitution, as well as outstanding secondary sources of information, especially volumes from Joy Hakim’s award-winning *A History of U.S.* series; (b) instructional practices, peer assistance processes, writing assignments, enriching extension activities, simulations, and assessments; and (c) staff development, mentoring and advising to support the curricular and instructional reforms.

**Career Exploration** - The Career Exploration and Educational Decision-Making curriculum is designed to (a) provide students with opportunities to find out about careers in which they are interested through a variety of activities, including reading, role-playing, interviewing, researching, and listening to career representatives in person and on video, (b) enable students to develop and view their own career aspirations in light of their interests and academic strengths, (c) give students facts about types of high schools and colleges, including entrance requirements and courses of study available to them, and (d) lead students to connect their current academic performance to the behaviors that help or hinder it, so they can set academic goals that will enable them to achieve their career aspirations.

**Electives:** Students will be able to choose from many electives including Spanish, music technology, art, physical education, and video production.

## **B. Reading Curriculum**

Berkley Accelerated Middle School will use the Talent Development Middle School model. The Talent Development Middle School Reading, English, Language Arts Program is centered on an innovative but thoroughly tested approach called Student Team Literature. *The National Staff Development Council* recently selected the Student Team Literature Program for inclusion in their Consumer’s Guide of effective staff development programs. After reviewing 450 programs, they identified Student Team Literature as one of only seven programs in Language Arts that consistently improves teacher effectiveness and student learning in the middle grades. The model’s core Reading/English/Language Arts (RELA) curriculum includes Student Team Literature, Talent Development Writing, plus an extra-help program called Computer- and Team- Assisted Reading Acceleration that provides additional instruction and reading opportunities for struggling students. Student Team Literature (Jones & Shaw, 1998) and Talent Development Writing (Jones & Snee, 2001) are adaptations and elaborations of the Student Team Reading and Writing developed by Robert Stevens (Stevens & Durkin, 1992).

The TDMS RELA program represents a coherent research- and standards-based approach to developing the literacy of older students. The program teaches effective reading strategies and operations, extends reading comprehension skills, develops fluency in reading and writing, systematically adds important words to students’ working vocabulary, and builds both basic language skills and higher-order thinking, literary analysis, and writing skills. One of the distinctives of this approach is its integrated nature. Skills are not taught in isolation. All objectives in RELA are taught through reading, studying, discussing, and responding to high-quality, high-interest books.



The TDMS RELA program includes a wide variety of curricular materials that support teachers' use of effective instructional practices, engaging and varied learning activities and assessments, and students' use of effective peer assistance processes. A primary tool in the TDMS RELA program is the Partner Discussion Guide, which structure the teachers' and students' teaching and learning activities. A Partner Discussion Guide is available for almost 200 books (fiction and nonfiction books from every genre, biographies, and collections of short stories or poems).

The purpose of the Partner Discussion Guide is to organize the students' learning activities as they progress through a book, to ensure that they comprehend each part of the book before going on to the next part, to develop the knowledge and strategies that will help them in future reading activities of the same kind, and to use the book as a jumping off point for mini-lessons on the writers' craft and other learning objectives in language arts that naturally connect to the book.

The teacher's edition of a Partner Discussion Guide contains all the necessary content for each day's lesson. These include pre-reading exercises to engage students in and prepare students for the day's reading and develop and practice strategic reading skills; teaching activities to model the day's lesson and teach specific reading, writing and critical thinking skills, silent reading with a purpose; cooperative learning activities including partner reading and discussion to provide the opportunity for guided practice of skills, interpretation, and understanding of the chapters being read that day; and prompts for reflection, review, and pre-assessment activities. The guides contain a variety of mutually-reinforcing written, spoken, and listening activities to ensure even a struggling reader's ability to successfully complete, understand, and apply award-winning books for young adolescents. The teachers' Partner Discussion Guide also contains sufficient background material about the author, the book, the literary devices and key concepts it contains, and other relevant information so that even a teacher previously unfamiliar with a particular book or one teaching out of his or her content area can obtain the expertise necessary to support deep student learning.

In *Student Team Literature* teachers decide:

- The literary selections that students will read;
- If all the words on a vocabulary list will be focused upon;
- If the starred words on a vocabulary list will be the words that students learn to use in *meaningful sentences* (or if different words will be chosen);
- If the number of pages of a literary selection to be read will be reduced (which may require that some Partner Discussion Guide questions be eliminated);
- Whether all or some Partner Discussion Guide questions will be answered in writing;
- Whether Partner Discussion Guide questions will be answered in a whole-class or partner format;
- If students will engage in Partner or Team reading;
- Whether the teacher or the students will establish purposes for reading; and
- If students will compose meaningful sentences in partnerships or teams.

### Differentiated Instruction:

According to Carol Ann Tomlinson, a leader in the area of differentiated instruction, to differentiate instruction is *to adjust content, processes, or products in accordance with students' readiness, ability, or interests*. Differentiating instruction is a mark of responsive, reflective practitioners as well as a mark of a practical program. Thus, the main components of the TDMS reading/English language arts program are quite flexible. Teachers are encouraged to adjust the content, the processes associated with them, and the products students create as they move through the activity cycles that comprise Student Team Literature and Talent Development Writing. Determining ways to differentiate instruction based on students' needs is the topic of one of the professional development sessions that Talent Development provides for teachers. Students who are reading below level, on level, and above level will all benefit from this differentiated instructional program as their activities will vary based on their needs.

Students who are reading below level will not have curriculum "dumbed down", but will be given supports to help them succeed. They will benefit from the differentiated instruction in RELA. Examples of differentiated instruction are:

#### *Student Team Literature:*

- Vary pacing in the multi-faceted process of working Partner Discussion Guides
- Vary degrees of independence given students when composing Meaningful Sentences or completing Extension and Literature-Related Writing Activities.
- Allow "compacting out" of Vocabulary Tests
- Vary assignment of Extension and Literature-Related Writing Activities (products) based on whether content is simple or complex, concrete or abstract.
- Vary assignment of Extension and Literature-Related Writing Activities (processes) based on whether a small or great leap must be taken

#### *Talent Development Writing:*

- Vary the content and features of pieces of writing students are to complete.
- Vary pacing of steps in the writing process
- Vary degrees of independence given students when selecting topics,
- Vary students' products (forms of writing)
- Group students based on their ability to work independently
- Vary the content of reading material used in springboard activities

**Extra Help** - Students who need extra help in reading attend a ten-week accelerated learning class (in addition to their regular reading class) that uses cooperative groups and computers to provide intensive learning experiences. Students needing extra help to meet high standards have responded enthusiastically to these "extra dose" classes even though the students miss an elective class for ten weeks in order to participate. These extra-dose classes help make detracking work well because the teachers of the regular classes feel no pressure to "dumb down" or "slow down" the curriculum: The teachers know that intensive extra help will be received by all students who need additional time and instruction to master the material.

Parents are supportive because they know their children are getting the extra help needed to perform at higher levels and are not being left behind.

#### Initial Training and Follow-Up Coaching

A key to the success of the TMDS RELA program is the staff development program that accompanies it and ensures that teachers receive the learning opportunities and support they need to teach effectively. The *National Staff Development Council* has identified the TDMS RELA program as one of seven effective middle grades programs in language arts that increases student achievement through teacher learning (Killion, 1999).

Talent Development Middle Schools are provided multiple layers of sustained professional development, technical assistance, and implementation support. An initial summer workshop provides a baseline of knowledge and skills in establishing peer-learning structures within the classroom and in using interactive instructional strategies.

The first layer is on-going subject and grade specific staff development that is explicitly linked to the curriculum. This professional development has three primary foci. First, on a monthly basis, Talent Development professional development sessions model upcoming instructional activities for teachers. Second, these sessions provide both the content knowledge required by these activities and demonstrate effective instructional strategies tied to the activities. Third, they provide the teachers with the opportunity to network and learn from each other.

The second layer of support is non-evaluative in-classroom implementation assistance provided by a curriculum coach who performs a wide range of support functions including modeling, troubleshooting, helping the teacher customize the curriculum to his or her classroom, and making sure the teacher has all the materials he or she needs.

The third layer of support is provided by lead teachers in the school who receive intensive training in the instructional programs being implemented.

The final and fourth layer of support is provided by Talent Development Middle School instructional facilitators employed by Johns Hopkins University who work closely with both the curriculum coaches, lead teachers, and principals to design the on-going staff development, customize and localize the instructional programs, and keep the instructional intervention on track.

### C. Goals and Objectives

#### **Goal 1: Increase student performance in all grades in Reading, Mathematics, and Writing.**

Goal 1, Objective 1- By testing year 2005 at least 50% of students in grade 6 taking the FCAT Reading and Math sections will perform at or above Level 3. By testing year 2006 at least 52% of students in grades 6 and 7 taking the FCAT Reading and Mathematics sections will perform at or above Level 3. By testing year 2007 at least 54% of students in grades 6, 7, and 8 taking the FCAT Reading and Mathematics sections will perform at or above Level 3.

Goal 1, Objective 2- By testing year 2007 using the state formula at least 88% of the 8<sup>th</sup> grade students taking the FCAT Writing test will be proficient.

**Goal 2: Increase the adequate progress of students scoring in the lowest 25%.**

Goal 2, Objective 1- Decrease the number of students scoring in Achievement Level 1 and Level 2 by at least 3% each year on FCAT Reading and Mathematics overall.

**Goal 3: Increase technology for all stakeholders.**

Goal 3, Objective 1- Students will be assessed every 9 weeks to determine progress and continued placement in programs. Students will increase their instructional level by one year for every year of instruction.

Goal 3, Objective 2- At least 70% of parents will participate in at least one technology workshop every year as evidence by workshop sign-in sheets.

Goal 3, Objective 3- 100% of core curriculum teachers will complete technology training each year as evidence by training sign-in sheets.

**D. Instructional Methods**

Kagan Cooperative Learning will be a fundamental method used at Berkley Accelerated Middle School. This fundamental shift in instructional methodology will allow students to master the challenging curriculum in a manner designed to emphasize success and optimal learning. The Kagan and Kagan methodology relies on the power of multi-structural lessons in which each structure builds on the effects of the previous structures, moving students through a carefully orchestrated set of learning experiences toward teacher-determined learning objectives. Structures become the building blocks of a lesson. Many schools integrate cooperative learning activities into the curriculum; however, these activities become overused and no longer produce the enthusiastic, intense involvement and learning among students. In contrast, Berkley teachers will be trained to utilize structures in addition to activities. Structures, unlike activities, do not “get used up” so teachers find numerous applications to integrate structures throughout all curriculum areas. Structures provide yet another advantage. Teachers who have difficulty translating abstract concepts such as positive interdependence and individual accountability into lesson plans can easily adopt structures like “Numbered Heads Together” and “Pairs Check.” Teachers are then free to teach rather than worry about implementing abstract concepts.

Training of teachers by other teachers will also be a key component of the Berkley model. Kagan Cooperative Learning training lends itself to this concept, as it is often difficult to find the time to train a new teacher in “cooperative learning,” but it is easy to train in one structure. Berkley has developed and implemented a year long training plan for teachers. All teachers at Berkley will participate in a Structure-A-Month Club during which time cooperative learning will be implemented in manageable pieces - a structure at a time. Dr. Spencer Kagan and his staff will work with the teachers at Berkley to begin implementation with those structures containing common objectives. The staff will begin implementing simple structures such as the relatively easy

four-step Numbered Heads structure for content mastery before moving to the nine-step Color-Coded Co-op Cards. Similarly, among the thinking structures, Team Discussion is presented before Team Word-Webbing.

The Berkley staff will work with Dr. Kagan to implement the key concepts of the cooperative learning program built around structures, content, and activities. According to Dr. Kagan's work, a structure itself is content-free; therefore, any one structure can be used to deliver an infinite range of content. Teachers will meet with their Structure-A-Month Club members and within their learning communities to share implementation strategies regarding various structures. These discussions will lead our teachers to improved instructional methodology and a more focused approach to key concepts, skills, and benchmarks identified by the Sunshine State Standards. As they work with fellow staff members, they will enhance, improve, and even discard applications to best serve the needs of the student. By changing either the structure or the content, a different activity is created with different kinds of learning results. Similarly, holding the content constant but changing the structure changes the activity and the resultant learning. This encourages teachers at Berkley to share ideas and brainstorm creative lessons without inter-classroom competition. A great deal of the art of good teaching is the ability to choose the best structure/content combination to reach a given learning objective. An activity is a structure/content combination.

To assure that our teachers become master teachers in the area of Kagan Cooperative Learning techniques, training and support of successful implementation will include:

- All teachers receiving the five-day Kagan Cooperative Learning Training
- The entire school celebrating a structure of the month including getting parents involved
- Key teachers (one per grade level) receiving the five-day Train the Trainer Cooperative Learning Training
- Peer coaching with half day training
- Peers observing partners once a month to provide coaching feedback
- Director visiting each classroom once a month to provide coaching feedback
- Laurie Kagan visiting each classroom in the fall and the spring to observe a structure and provide feedback
- Director attending a two-day training for administrators
- Teachers and administrators interested in implementing cooperative learning visiting our school.

**Continuous Progress Learning** - Berkley will implement a continuous progress learning model designed to challenge students who are working at or above grade level while creating a safety net for struggling students to assure that all students progress at their optimal learning level. Using such techniques as looping, multi-age classrooms, and time as a variable, student progress will be measured by mastery rather than seat time. Berkley staff will use an Extended Learning Program that will allow students who are below grade level additional time to advance using flex time. This additional time may be offered after school, on Saturdays or during breaks as designed by the Berkley staff in conjunction with the School Advisory Council or community members' input.

Using the Kagan structures outlined in this proposal, students will be placed in achievement-centered groups designed to offer challenging curriculum and promote success regardless of the

grade level of the work. As students achieve success and receive positive feedback from their teachers and teammates, their confidence and self-esteem will improve. This resulting “can do” attitude will have a positive impact both academically and personally.

### **E. Exceptional Education and Limited English Students**

Berkley has indicated in its mission statement, Accelerated Learning for All, Whatever It Takes, that we are committed to assisting each student to reaching his or her full potential. There are two populations of students that are often overlooked in this drive toward success. These students will not be overlooked at Berkley. All of our ESE students will be active participants in our journey to success. These students will be involved to the fullest extent possible in the daily activities, curriculum, and the afternoon programs offered at Berkley. An emphasis on character education, community service projects and a challenging curriculum will assist not only the school community and the community as a whole, but also infuse our exceptional education students with a sense of personal worth.

Limited English Proficiency students will benefit greatly from two of the key innovations offered at Berkley. A powerful tool will be the Kagan Cooperative Learning structures designed to include all students in learning and socialization activities. As the LEP students become contributing members through structured cooperative activities, they will experience increased self-confidence and will become valued contributors to the learning process.

Both groups contribute to the diversity of the student body and the enhanced learning of everyone – students, faculty, staff, and the parents of Berkley Accelerated Middle School.

## **3. Student Assessment**

### **A. Goals and Objectives**

#### **Goal 1: Increase student performance in all grades in Reading, Mathematics, and Writing.**

Goal 1, Objective 1- By testing year 2005 at least 50% of students in grade 6 taking the FCAT Reading and Math sections will perform at or above Level 3. By testing year 2006 at least 52% of students in grades 6 and 7 taking the FCAT Reading and Mathematics sections will perform at or above Level 3. By testing year 2007 at least 54% of students in grades 6, 7, and 8 taking the FCAT Reading and Mathematics sections will perform at or above Level 3.

Goal 1, Objective 2- By testing year 2007 using the state formula at least 88% of the 8<sup>th</sup> grade students taking the FCAT Writing test will be proficient.

#### **Goal 2: Increase the adequate progress of students scoring in the lowest 25%.**

Goal 2, Objective 1- Decrease the number of students scoring in Achievement Level 1 and Level 2 by at least 3% each year on FCAT Reading and Mathematics overall.

## **B. Assessing Student Performance**

Student will be assessed formally every nine (9) weeks in reading, writing, and mathematics. The administration will meet with each teacher to monitor student progress and provide alternative instruction if needed (i.e. more time for learning, tutoring use of technology, alternate teaching strategies, etc.) to ensure the success of all learners.

Student progress will be graphed to provide a visual representation of academic progress for the student, parents, and teacher during parent conferences. This and other information will be provided by the school as additional information to be sent home with the report card.

Grade level academic expectations will be clear and concise. All formal nine week assessments will project grade level expectations.

Academic Improvement Plans (AIP's) will be completed and followed to assure that who are struggling or not meeting standards have a plan of action documented that will help them succeed. Students who are to be retained must receive counseling services and may be recommended for evaluation by specialists if the teacher and director feel such a referral would benefit the child. "Specialists" are defined as those support services personnel having expertise and training in diagnosing learning difficulties and shall include school-based as well as itinerant personnel. Any student who has been retained one year and is recommended for retention a second year will be referred or reevaluated by appropriate school-based and/or itinerant personnel.

There will be a clear curriculum alignment. The Comprehensive Core Curriculum that includes the Sunshine State Standards will be aligned with the school assessments. Berkley Accelerated Middle School will participate in the FCAT Reading, Writing, and Mathematics. Student test score data will be used in the school improvement plan.

Technology will be utilized to monitor on-going mastery of the Comprehensive Core which includes the Florida State Benchmarks and to make immediate corrections in the student learning path. The primary focus is to be preventive rather than remediation.

Baseline data will be gathered during the first four weeks using both technology and non-technology based assessment instruments such as Accelerated Reading, STAR, IRI, SFA Assessment, and Compass Learning Assessment. Students will progress at a greater rate than during their previous school year as demonstrated by the data collected during the 2003-2004 school year.

In the fall of the first year, assessments will be given in reading, writing, and mathematics to establish the incoming baseline of achievement on each student. FCAT student scores from the school district will be obtained for the previous year. School wide assessments and FCAT scores will both be used to establish a baseline of achievement. Student success will be evidenced by an increase in student performance as reported by school wide assessments and/or criterion-referenced tests such as FCAT scores. Berkley Accelerated Middle School will meet or exceed the district average FCAT scores.

### **C. Identification of Student Strengths and Needs**

Berkley Accelerated Middle School will use an external evaluator as well as staff personnel to review cumulative folders to determine prior rates of academic progress, where applicable, for our students. In addition, the evaluator will work with district office staff to compare the progress of students at Berkley Accelerated Middle School to comparable students within the surrounding school districts.

We realize that part of creating a new learning environment is to refine continually with faculty, parents and students, the definitions, implementations and measurement of pupil outcomes. Methods of assessment will gradually move our students from traditional testing to authentic assessment.

Students at Berkley Accelerated Middle School will use a variety of performance assessments to measure their progress throughout the school year. Unlike many traditional programs, assessment will not be something *done unto* the student; rather it will be an integral part of the student learning process. Parents, teachers and students will work as partners to evaluate progress and prescribe performance based outcomes designed to maximize student learning.

### **D. Evaluation and Comparison of Student Progress**

Berkley Accelerated Middle School students will complete all state mandated testing as required under state and charter law. Additional testing will be utilized within the school to assist in the appropriate placement of students within learning teams as well as math and reading settings. As the Florida FCAT testing model moves to learning gains as measurement, BAMS is confident that all of our students, but especially the lowest quartile will demonstrate dramatic improvement in academic performance. As a whole, students at Berkley Accelerated Middle School will perform at or above district averages when compared with comparable school populations. We also anticipate our students will perform at or above state averages.

### **F. Statewide Assessment**

All students enrolled at Berkley Accelerated Middle School will participate in FCAT Reading, Writing, Mathematics, and Science assessments. Students with Individual Education Plans (IEP's) that state Alternative Assessment will take the state Alternative Assessment.



## **II. GOVERNANCE AND MANAGEMENT**

### **1. Profile of the Application Group**

#### **A. Founding Board/Initial Incorporators**

The organizing group of directors represents a diverse group of people with a wide range of experience and expertise. They include representatives of the school community including parents, business and community leaders. The founding members are community members and parents who are dedicated to the goal of bringing the most nurturing environment possible to the students of Polk County school district.

A brief description of each Board Director follows:

Mr. Chris Brauckmuller is a parent representative. Mr. Brauckmuller is Vice President/ Office Manager/ Project Manager with B.L. Smith General Contractors Inc. Mr. Brauckmuller has great knowledge on commercial building work and construction. He also has four years experience in payroll, hiring, and company vehicle safety and maintenance. Mr. Brauckmuller's experience will aid the board greatly.

Mrs. Paula McCurdy is an educational representative. Mrs. McCurdy has over 21 years experience as a high school English teacher. Mrs. McCurdy has also served on various School Advisory Committees and as Chairperson for Berkley Elementary School SAC. She has experience in Kagan Cooperative Learning, CRISS training, computer labs, and has written federal grants.

Mr. Chris Thompson is Human Resources Manager at the Auburndale Main Street plant of Coca-Cola North America. He is responsible for all aspects of Human Resource at the plant. He is also responsible for plant security, safety and community relations. Mr. Thompson has a M.A. in Industrial / Organizational Psychology from the University of Tulsa and a B.S. in Psychology from Central Michigan University. He is a Board Member of Polk Works and the Education Committee of the Auburndale Chamber of Commerce and taught gifted elementary school students in the Saturday school program at Georgia State University.

Mr. Butch Vanderpool is owner / President of Health Care Diagnostics, Inc., HCD Infusion Care, Inc., and HCD Sleep Disorders Lab. Mr. Vanderpool has more than 15 years experience in the Home Medical equipment and Home Infusion industry. Mr. Vanderpool was awarded the 2002 Gold Cup Industry award for small business. Mr. Vanderpool has a Bachelor of Science Degree in Biblical Education from Lee University in Cleveland, Tennessee. Mr. Vanderpool has been an ordained Minister for 17 years and currently pastors Grace Fellowship in Auburndale, Florida.

Mr. Dennis W. Young is a community representative. Mr. Young has twenty years experience in a management position dealing with engineering / maintenance concerns and personnel policy procedures. He is experienced in project management, maintenance, construction, drafting, planning, scheduling, and estimating. He has been a guest speaker on Resorts Engineering topics at the University of Central Florida. Mr. Young has a Bachelor of Arts Degree from the University of

Central Florida and a Master of Business Administration Degree from Florida Institute of Technology.

Note: Profiles of each member of the Founding Board of Berkley Talent Development Middle School are contained in Appendix A.

## **B. Continuing Governance**

Subsequent to approval of the charter application, the initial incorporators of the not-for-profit corporation will include members of the Founding Board. The initial corporate board will include founding board members as well as members with a range of professional skills capable of the organizational, financial, pedagogical, legal, and other tasks required to open a functioning public school.

## **C. Consultants or Professionals**

### **Florida Charter School Services, Inc.**

#### **Current Staff**

**Danny Wheelock** is a graduate of East Tennessee State University. He has 36 years experience in the field of school finance and served as Finance Director with The School Board of Polk County, Florida. He is President of Florida Charter School Services, Inc. and has provided consultative services to The Florida Department of Education and The Florida Charter School Resource Center in areas relating to funding and budgeting as well as ESE funding issues.

**Joseph Wheelock** is a graduate of East Tennessee State University. He is a Certified Public Accountant and has had an accounting practice for over 25 years. He has considerable experience in federal tax and payroll issues as well as experience in customizing software to meet the various needs of his clients.

**Diane Bertrand** is a graduate of The University of Central Florida. She is a Certified Public Accountant and has 25 years experience in governmental accounting and auditing. She has worked for The Auditor General's Office of the State of Florida, The School Board of Polk County, and Polk Community College. Most recently, she was Vice President of Administrative Business Services for Polk Community College.

#### **Kagan Professional Development**

**Dr. Spencer Kagan** is a former clinical psychologist and professor of Psychology and Education at the University of California. He has published over 75 books, book chapters, and scientific journal articles, focusing on instructional strategies, curriculum, cross-cultural development of cooperation, cooperative learning, cognitive styles and abilities, and multiple intelligences. Dr. Kagan is the originator of the structural approach to instruction which allows an easy integration of cooperative learning, character development, and multiple intelligence as part of any lesson at any grade level.

**Laurie Kagan** is in demand as a presenter world-wide. She presents across the United States, Canada, Europe, Japan, SouthEast Asia, and Australia. Former K-12 Teacher and past Director of Elementary Education for the State of Nevada, and presently Director of Consulting Services for Kagan Professional Development, Laurie has designed and directed large-scale multi-year training programs involving thousands of teachers. Laurie translates a deep understanding of theory and methods into practical, teacher-friendly strategies that really work.

#### **Auditors**

##### **Baylis & Company**

53 Lake Morton Drive, Lakeland, FL, Certified Public Accountants and Management Consultants.  
(Proposal letter in Attachment B)

#### **Insurance**

##### **Mulling Insurance**

Mulling Insurance Agency of Auburndale, Kevin Mulling and Mark Spann. Mulling Insurance has been in the insurance business in Auburndale for over fifty years.

### **D. Expertise to be Acquired**

Berkley Accelerated Middle School's Founding Board will complete training through The Florida School Boards Association, Inc. Trainings will include Governance Model training to ensure the board is complying with their legal roles and responsibilities.

### **E. Business Arrangements and Partnerships**

Berkley Accelerated Middle School will maintain a partnership with the School Board of Polk County, Berkley Charter Elementary School, Inc., and other schools in the district.

The school will recruit business partnerships with businesses in our community during the first year of opening. We will form a close partnership with the local Chamber of Commerce in Auburndale. A close partnership will exist with our parents and school volunteers. During our first year, we will form a recruiting committee to reach out to our volunteers and welcome their partnership with the school.

The school may enter into various privatization partnerships for services such as food service, custodial, maintenance, accounting, etc.; however, no contract for these services exists at this time. These contracts will be approved by the Board of Directors and copies of said agreements will be furnished to the sponsor upon request.

## **F. Conflict Resolution**

The organizing committee of Berkley Accelerated Middle School desires to maintain an excellent working relationship with the PCSB and the PCSB district staff. To that end, every effort has been made to provide a cooperative environment during the development of this application. The founding Board of Directors has tried to anticipate every possible area of conflict and address those areas early on through meetings with district personnel. Berkley Board of Directors believes that a proactive approach to conflict resolution will be mutually beneficial to both Berkley and the School District of Polk County. Therefore, Berkley will meet with district representatives frequently to address areas of concern and success. We are confident that as concerns over the needs of our students arise, we will meet these challenges as opportunities for improvement and modify the charter in the students' best interest. Although Berkley is dedicated to a conflict-free relationship, the procedures that follow should quickly resolve any unanticipated conflicts should they arise. Conflicts that may arise between the PCSB and Berkley Board of Directors will be resolved in the following manner:

The Berkley Board of Directors will meet with appropriate PCSB personnel and Berkley directors to mediate the issue. If the issue remains unresolved, the issue shall be brought to a public hearing. If unsuccessful in resolving conflict, then either party may request technical assistance from neutral reviewers such as the appropriate office of the Florida Department of Education or Florida School Boards Association, which may act to mediate the issue. If unsuccessful yet, either party may submit the matter for arbitration in accordance with the Florida Arbitration Code, Chapter 682, Florida Statutes, and judgment upon the award rendered by the arbitrators may be entered by any court having jurisdiction thereof.

## **G. Parental Involvement**

Berkley Accelerated Middle School considers parents a vital element of the program's success. Parents will serve in many voluntary and advisory capacities for the school including but not limited to: PTSA and SAC. Parent representatives will also serve as voting members of the Berkley Board of Directors.

Parents will serve as guest speakers, chaperones, career mentors, advisors for student groups, and in various other roles as needed by Berkley. Many parents will also serve as business partners and contribute curriculum ideas, project materials, and expertise to benefit the Berkley Accelerated Middle School program.

Berkley will strive to keep the parents informed in many ways. Additional information on student progress {i.e. graphs, visual(s)} will be included with the 9-week report card. A monthly newsletter, containing information concerning school news and events, will be distributed to each parent. In addition, evening parent meetings will be offered that focus on ways parents can help their child succeed in school. Berkley will also present many events highlighting student achievements, including the annual student art show, academic awards ceremonies, annual drama

and musical performances, the annual video production awards and ceremony, and other events throughout the year.

All parents will be given equal opportunity to contribute to the Berkley Accelerated Middle School program. Both students and parents will sign a contract of commitment with Berkley each academic year. Parents may also serve on the SAC, which represents the parent and student population and serves as advisory group to the Board of Directors and the administration of the school.

It is the goal of Berkley Accelerated Middle School to assure academic and social success for each of the students and families we serve. Unfortunately, in rare instances, a parent may be unhappy with decisions made at the school level. The first course of action will be to have that parent meet with the teacher or teachers in an attempt to resolve this issue. Should that be unsuccessful, a member of the administrative team and/or a guidance counselor will meet with the parent to address the parental concerns. The next step in this process would be a meeting between the parents and the executive director. In the event the issue is still unresolved, the parent may request to be placed on the next governing board agenda. Information regarding time and place of the next governing board meeting will be made available to the parent. The governing board will hear the parental concern as well as school interventions and recommendations and make a final decision with regard to this issue. Parents cannot be compelled to have their children attend a charter school; therefore, parents always have the right to remove their children from Berkley Accelerated Middle School.

#### **H. Compliance with Florida Statutes**

Public records for Berkley Accelerated Middle School will be open for personal inspection by any person, as defined in Chapter 119, Florida Statutes.

Board of Directors meetings will be open to the public, according to s. 286.011, Florida Statutes. Reasonable notice of the time and place of Board meetings will be publicized in the newspapers, school marquee, and school website.

Minutes of the Board of Directors' meetings will be kept and will be available for public inspection upon reasonable advance notice from any citizen of the state of Florida.

### **3. Length of Contract and Implementation Timetable:**

#### **A. Initial Charter Term**

As the program is unique in design and implementation, Berkley is seeking a five-year contract term to operate the proposed charter school. The term would begin July 1, 2004 and be renewable for additional years on June 30, 2009. The five-year term will allow the school enough time to appropriately show student academic progress and program success.

Berkley will submit annual reports of academic progress to the School Board of Polk County, PCSB Office of School Choice and the Department of Accountability, and to the Department of Education, Office of Public School Choice.

#### **B. Implementation Timetable**

- **September 2, 2003** –BAMS charter proposal due to Polk County School Board.
- **October 2003** - Presentation to Polk County School Board work session.
- **October 2003** - Charter review community meeting.
- **October 2003** - Charter review committee recommendation at Polk County School Board work session.
- **October 2003** - Final approval of charter proposal.
- **November 2003** – Six-month period begins to mutually agree to provisions of contract.
- **November 2003**- Start financing preparation and loan acquisition.
- **January 2004**- Ground breaking to start construction of school.
- **March / April 2004** - Begin open enrollment process.
- **March** – Infrastructure of building complete.
- **April-June 2004** - Curriculum development and program planning.
- **April – June 2004**- Staff hired, training completed
- **June 30, 2004** -Submit any final documentation to Polk County School Board.
- **July 1, 2004** - Begin charter contract.
- **July 2004** - Faculty and staff participate in program training; supplies and text materials are ordered.

- **July 2004-** Complete construction and set up classrooms.
- **August 2004 -** Opening of school based on Polk County School Board school calendar.

## **4. Recruiting and Marketing Plan**

### **A. Publicizing the School**

Berkley Accelerated Middle School will use aggressive recruiting and marketing techniques to maintain a sufficient and diverse pool of applicants. In a conscious effort to gain more community-wide exposure, the school will also incorporate the following proven methods:

- Establishing personal one on one interaction, followed up with printed materials including fact sheets, brochures, and copies of newsletters.
- Targeting prospective applicants at local neighborhood events such as art shows, concerts, and school related functions.
- Garnering positive newspaper coverage of unique school events that will highlight our progressive programs, core curriculum, extra curricular activities and/or special celebrations.
- Hosting well-publicized open house events twice a year for the community.
- Offering organized school tours by student ambassadors for potential student applicants, parents, and interested community members.
- Supporting the dispersion of pertinent Berkley information via our website.
- Creating a video which showcases Berkley and allows prospective applicants and their families an opportunity to view it at community functions or in the privacy of their own homes.
- Speaking at Auburndale Chamber of Commerce meetings to provide marketing materials.
- Working with realtors in the area to provide marketing materials.

### **B. Representation of Racial and Socioeconomic Diversity**

In addition to the recruiting and marketing techniques used in the community at large, specific steps will be taken to reach students representative of the racial and socioeconomic diversity in the community, including typically “harder to reach” families. Specific marketing efforts include:

- Monies from federal grant will be used to provide a supplement so that a minority teacher has eighty hours set aside for summer minority recruitment.
- Presentations by students and administrators in culturally diverse community parent groups and civic organizations
- Direct mailings of letters, brochures, newsletters, open house invitations and/or events calendars to specifically targeted populations
- Transportation to evening school events and after-school programs
- Kagan Cooperative Learning Structures that focus on strategies that reaches all students and builds on multicultural awareness and positive interdependence
- Scholarships for minority children that wish to attend Berkley’s after-school Kid Care or after school clubs will be investigated
- After school programs (sports, games, Rocket Club, Spanish Club, Drama Club, Chess Club, Movie Making Club) will enhance the recruitment process.



### **Evidence of Support:**

A broad range of community support is evidenced by the diverse experience and capability of the Board of Directors.

These outstanding men and women who are parents of children in Polk County Schools have committed themselves to oversee the affairs and management of the proposed school. They represent a deep desire among parents, educators, and the business community to create a charter school that gives parents and teachers more choices and more opportunities.

We have demonstrated support and commitments from people in the business community, financial consultants, and the Florida Legislature.

Another layer of support has been offered by Mr. Craig Rouhier who is developing an approximately 415 home community adjacent to the current Berkley Charter Elementary School. Mr. Rouhier has committed to a donation of approximately 4.8 acres of land to build Berkley Accelerated Middle School. This donation will enable a perfect location for the new middle school that will serve the expanding area well. See proposed middle school location in attachment F.

Support has been given by the parents of Berkley Charter Elementary, Inc. for the past three years. There have been many votes taken by the parents, SAC, and PTO that represent an over 98% support for the creation of a middle school where students from Berkley Elementary School could continue their education.

Numerous other individuals and companies have pledged their support in many areas and ways. There are examples of support in Appendix B.

### **III. FINANCE AND FACILITIES**

#### **1. Facilities**

##### **A. Description**

Berkley Accelerated Middle School will be located just off Berkley Road north of Berkley Elementary Charter School. W. M. Sanderlin & Associates, Inc. is willing to form a partnership with the proposed Berkley Accelerated Middle School and has agreed to donate approximately 4.8 acres just north of the elementary school on Berkley Road. Berkley Accelerated Middle School will secure traditional financing for construction of the new facility based on cash flow and property equity. Communication with local lenders has made this plan possible.

The initial building will contain approximately 13,000 square feet to include an office and eight classrooms. Plans for future growth in enrollment will be drawn to include two more buildings with eight classrooms each. All buildings will conform to new construction building codes where applicable to charter schools.

##### **B. Site Suitability**

The Board of Directors will ensure that all facilities will comply with the State Uniform Building Code for Public Educational Facilities Construction adopted pursuant to Section 235.26, Florida Statutes, or with applicable state minimum building codes pursuant to Chapter 553, Florida Statutes, as adopted by the authority in whose jurisdiction the facility is located.

The identified facilities meet all the requirements for health and safety required by Florida State Charter School Legislation and all pertinent local, state, and federal guidelines. Capital maintenance, regular scheduled maintenance, routine facilities maintenance and ground maintenance of the facility will be the responsibility of the School Board of Polk County. Routine maintenance costing less than \$100.00 will be the responsibility of Berkley.

##### **C. Future Facilities Acquisition**

The Board of Directors and School Advisory Council will, as part of the school improvement planning process, consider additional facilities that may be required in providing instructional services.

Additional facilities may be planned to augment instructional and/or extra-curricular activities for the future.

## **D. Facilities Financing**

Facilities financing will be achieved through FTE funding, fundraising, capital outlay and donations. The financing costs to cover the construction of the before-mentioned facilities is shown in the five year budget. Berkley will secure traditional financing for construction of the new facility based on cash flow and property equity. Communication with local lenders has made this plan possible.

## **2. Finances**

### **A. Annual Financial Plans**

Attachment C contains: Revenue Estimate, Staffing Plan, Operating Budget, and Financial Summary.

### **B. Financial Management and Internal Accounting**

Berkley Accelerated Middle School takes the financial accountability requirements of Florida's Charter School Legislation very seriously. The organizing committee will take the necessary steps to ensure financial accountability. Once the budget is established, a monthly financial report will be sent to the PCSB Director of Finance that will show expenditures, outstanding purchases, and projected expenses.

The Board of Directors will have responsibility for reviewing and approving the budget on a regularly scheduled basis. In addition, an outside consultant or accountant will review the accounts on a monthly schedule. Furthermore, an annual audit by an outside accounting agency will be utilized.

The director's secretary may serve as the school based finance manager providing the Board of Directors with the necessary information they need. The Board of Directors may also hire a business manager if deemed necessary.

The director will approve all purchases up to \$5,000 and also give a monthly report to the Board of Directors. All purchases above \$5,000 will need approval by the Board of Directors.

### **C. Format**

All accounting records shall be maintained in the format currently used for Polk County Public Schools. Records shall be maintained in the format described in *Financial and Program Cost Accounting and Reporting for Florida Schools*.

#### **D. Projected Enrollment**

The projected enrollment for Berkley Accelerated Middle School is:

- 2004-2005- 100 6<sup>th</sup> grade students
- 2005-2006- 200 6<sup>th</sup> and 7<sup>th</sup> grade students
- 2006-2007- 300 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> grade students
- 2007-2008- 400 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> grade students
- 2008-2009- 500 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> grade students

The projected enrollment and the financing associated with these numbers is outlined in the attached budget.

#### **E. Annual Audit**

The projected budget includes dollars set aside to hire a certified public accountant or accounting firm to conduct an independent, annual audit of financial statements. BAMS will begin the hiring process for this auditor no later than January 2005. All records will be compiled and prepared for review by August 15, 2005. The audit will be prepared in written format and will be provided to the Office of School Choice and the School Board auditors (two copies each). Audit information will also be included in the annual report which is distributed to School Board members as well as state officials. Any and all audit exceptions will be addressed and remedied prior to submittal to district and state officials.

#### **F. Storage of Student and Financial Records**

Our school will implement the use of the storage facilities in the administrative offices of Berkley Accelerated Middle School and will follow the guidelines of the Polk County School Board for storage. Students who withdraw from BAMS will have their records forwarded to their next attendance center; students who roll up to high school will have their records forwarded in a timely manner to their designated high school. Key concerns addressed at the Berkley site will include:

- Limited access, authorized personnel only;
- Protection from natural disasters;
- Protection from theft, vandalism and intruders;
- Additional security measures.

#### **G. Financial Reporting**

Using the *Financial and Program Cost Accounting for Florida Schools* model, monthly financial reports will be forwarded within thirty days to the Finance Office of the Polk County School Board with a copy also forwarded to the Office of School Choice. This information will include revenues and expenditures in the "Red Book" format as well as quarterly bank reconciliation statements. At the end of one year administrative staff will meet with the Office of School Choice and finance representatives to determine the appropriateness of quarterly reporting statements.

### **3. Risk Management**

#### **A. Identification of Risks and Loss Impact Approach**

Berkley Accelerated Middle School has obtained estimates of insurance costs in order to comply with the Polk County School District's insurance requirements for charter schools. The estimates for General Liability, Commercial Crime, Non-Owned Auto, Directors & Officers Liability and Workers Compensation are located in Attachment D.

#### **B. Safety and Security of Students and Staff**

Berkley Accelerated Middle School is committed not only to continuing this process but improving plans to ensure the safety and security of students and staff. Our governing board will work with parent groups to identify risk factors and develop specific interventions to decrease the likelihood negative instances with regard to students and staff safety issues. The Kagan and Kagan Cooperative Learning Model teaches, models and reinforces the development of positive social skills for all students. All teachers will continue to receive training in social skills development and cooperative strategies.

Berkley Accelerated Middle School has in place disaster preparedness (Attachment E) that includes specific steps to deal with intruders on campus, natural disasters, and other child and staff safety issues. This plan will be reviewed by the governing board and strengthened as needed.

#### **C. Protection from Violent or Disruptive Student Behavior**

Studies show that student safety is the number one concern for parents of school-age children. Berkley Accelerated Middle School has already developed a plan to identify, minimize and protect others from violent or disruptive student behavior. In addition, the governing board in conjunction with a parent committee will review and upgrade these plans.

#### **D. Insurance**

Upon completion of contract negotiations with PCSB, the Board of Directors will provide the required insurance in the agreed-upon amounts as part of the final documentation provided to the PCSB on or before June 30, 2004. Proof of such insurance compliance will be provided to the PCSB in accordance with Florida Charter School Legislation.

## **E. Emergency Plans – see attached Disaster Plan**

Berkley Accelerated Middle School has developed a detailed emergency preparedness plan which includes plans for fires, hurricanes, tornadoes and child safety. The governing board, with input from parents and staff, will review and upgrade this plan as necessary. A copy of the Berkley Accelerated Middle School Disaster Preparedness Plan is attached as an addendum to this application.

Disaster Preparedness Plan is located in Attachment E.

## **IV. OPERATIONS**

### **1. Admissions and Registration Plan**

#### **A. Admissions Procedures**

Any student residing in Polk County who is ready to enter middle school may apply to Berkley Accelerated Middle School. BAMS will work with the Office of School Choice to create a fair and impartial admission plan to ensure that all students will have an equal opportunity, through random lottery, to attend this school. BAMS will create both a black and a non-black waiting list for each grade level to assure compliance with desegregation as required through the unitary status agreement currently in place in the Polk County School System.

Applications may be processed in the school office during office hours or mailed to the school address. Applications processed in the school office will be stamped with a date and time received. Mailed applications should be postmarked to determine priority and waiting list. Applications will be prioritized according to the date stamped or postmark. All applications that are received during the week of open enrollment will be treated as though they arrived at the same time. A computerized lottery system will be used to randomly sort and select applicants to determine seats on a space-available basis. Once all seats are filled the lottery will continue so that each applicant is either given a seat or a number on the waiting list. Enrollments are determined by priorities listed below, grade levels, minority enrollment requirements and physical space.

A priority will be given to the following students in this order of priority:

1. Students whose parents are employed by Berkley Accelerated Middle School or whose parents are active governing board members of the school.
2. Sixth grade students whose siblings are enrolled in 7<sup>th</sup> or 8<sup>th</sup> grade.
3. Students applying from Berkley Elementary Charter School.

In order to enjoy this priority, these students must apply during the week of open enrollment period and clearly mark their priority on the application. Upcoming sixth graders who have siblings enrolled at Berkley Accelerated Middle School during the open enrollment period will automatically be accepted to sixth grade at BAMS if they apply during the open enrollment period.

## **B. Registration Timetable**

### **Selection and Admission Guidelines:**

- All applications must be processed at the school site, stamped with date and time received or mailed to the school via U.S. mail.
- Racial balance is a factor in determining acceptance at the school.
- Applications will be available to any interested student in the Polk school district.
- Transportation will be provided only to the identified transportation zone for the charter school.
- A one-week response will be given to accept or reject placement. A new application must be submitted for future consideration.
- Students who apply are given a priority number for that grade and race. This number only applies for that grade and race. Therefore, students retained must reapply in order to be eligible in that grade.
- A recommendation for placement back into a zoned school will only be made after intervention strategies have been implemented and documented; however, there may be occasions when the Executive Director feels that the welfare of the classmates may take precedence in consideration for exiting a particular student without parental consent.
- Berkley Accelerated Middle School will foster a cooperative learning environment and a challenging academic curriculum. A strong behavioral code will be in existence at the school.
- The admission procedure will include a non-discriminatory screening process for students.

## **C. Racial/Ethnic Balance**

Through the application and selection processes established, Berkley will maintain a racially and ethnically balanced school, reflective of the community it serves. BAMS is committed to helping the PCSB meet the requirements established in the desegregation order and consent decree.

### **2. Class Size Requirements**

Berkley Accelerated Middle School will open meeting or exceeding the class reduction student teacher ratio in core curriculum classes placed in law by the Florida Legislature via SB30A: "The Quality Education Act" which establishes limits on the number of student in core curriculum classes by grade level.

### **3. Student Code of Conduct, Discipline & Dismissal Procedures**

#### **A. Code of Conduct**

Berkley Accelerated Middle School will follow the Code of Conduct utilized by the Polk County School System. It is the goal of the Berkley Accelerated Middle School to serve qualified and interested students for the duration of their middle school career.

By choosing to enroll a student at Berkley Accelerated Middle School, parents provide their children with an alternative educational opportunity in a unique environment centered on accelerated learning.

In order to ensure this favorable environment, students are expected to adhere to guidelines and policies of the charter school. Staff members of the Berkley Accelerated Middle School will continually monitor student progress in the areas of attendance, academics and behavior.

#### **B. Discipline and Dismissal Procedures**

Students who are not meeting the expectations of Berkley Accelerated Middle School or exhibit continued misconduct may be required to participate in any or all of the following interventions to assist them in improving their attendance, academics or behavior.

- Teacher/Student conference
- Teacher/Parent conference
- Goal setting
- Peer Mediation
- Conflict Resolution Training
- In school suspension or time-out
- Out of school suspension
- Saturday work detail
- Probationary status letter

Other discipline interventions as identified by BAMS administration and staff may be added to this list. All students and/or their parents are entitled to due process including, but not limited to, a hearing by the director, an appeal to the Board of Directors, and School Board of Polk County appeal process. All exceptional education students (ESE) will be disciplined according to state ESE guidelines. All appropriate parent notifications and consideration for manifestation of disabilities will be addressed in the disciplining of these exceptional students.



### **C. Safety and Security of Students and Staff**

Berkley Accelerated Middle School plans to follow the Polk County Code of Conduct which addresses both major and minor infractions. In addition, a parent and student contract will be in place by our opening as a charter school. This contract will outline clear expectations and consequences for failure to meet these expectations. Since attending BAMS will be a choice that parents and students make rather than a requirement of zoning, we anticipate increased buy-in on the part of the Berkley families who choose to enroll their students. Students who are disruptive or a danger to themselves or others will be dealt with immediately. Depending on the severity of the offense students may be isolated through in-school suspension, may be assigned out-of-school suspensions or work detail, or even be dismissed from the school. An added component to dealing with these students will be interventions such as anger management instruction, guidance counseling sessions, teacher-parent-student meetings and other interventions designed to identify the root problems and teach appropriate behaviors. Students who are ESE students will be disciplined according to the state and federal ESE guidelines and the behavior intervention plan prescribed in their IEPs.

## **4. Human Resource Information**

### **A. Hiring of Staff**

All personnel will be recommended by the Executive Director and approved by the Board of Directors. All employees will be fingerprinted and have background checks completed. Berkley is a drug free workplace and all personnel may be subject to random drug testing. To employ qualified staff, the Board of Directors will review applicants individually to determine if suitable qualifications are met. All employees will follow the PCSB procedures for hiring.

Performance evaluations will be completed by the administrative staff annually. Forms and processes for annual evaluations will be provided by the School Board of Polk County. Berkley Accelerated Middle School shall select its own employees including those who are employees of the PCSB. Berkley employees are public employees and elect to be members of the Florida Retirement System. All Berkley employees who are employees of the School Board of Polk County will be given annual leave or placed on assignment for the duration of their employment at the charter school and shall retain and accrue seniority for time spent working in the school district. In order for an employee to return to the PCSB, they must meet all job requirements and PCSB policies. Berkley will have access to all PCSB policies, procedures and application processes and will be notified of all meetings regarding policy and procedure revisions and/or changes.

**Administrators:** Directors and assistant directors may hold a master's degree and/or certification in an appropriate area such as administration and supervision or educational leadership. The director will report directly to the Board of Directors. All other personnel will report directly to the director.

**Teachers:** All teachers will hold a valid Florida teaching certificate, will comply with eligibility for certification within two years of hiring date, or will comply with expert in field status in

accordance with s. 2311725. Berkley will seek racial balance among staff to be in compliance with desegregation.

**Support Staff:** Support staff will include the following jobs in addition to others as the Board of Directors determines appropriate to support the program.

- Paraprofessionals
- Secretaries
- Custodians
- Cafeteria Staff

**Substitute Teachers:** Because of the unique nature of the program and the skills needed at Berkley, the school will hire and train its own substitute teachers.

## **B. Human Resource Policies**

Berkley is an equal opportunity employer. The school will not discriminate for any reason including race, ethnicity, religion, age, and gender or physical limitations. If the personnel process or procedure is not specifically addressed in this document, it is assumed that Berkley will follow the Polk County School Board guidelines.

**Salaries:** Salaries will, at a minimum, meet the standard of the approved salaries of the Polk County School Board taking into consideration the employees' educational background and employment history upon approval of the Board of Directors. The Board of Directors will determine the amounts and conditions of supplemental compensation such as, duty beyond the workday, training, and performance based compensation for all employees.

**Contracts:** All personnel contracts will comply with the Polk County School Board policy. The faculty and support staff, by majority vote will make the determination whether their current collective bargaining association will represent them or if they will form an independent group for representation.

Berkley will follow the established calendars below:

- Students: Polk County School Board student academic calendar or PCSB approved balanced calendar
- Personnel: Work schedule will be determined by the Board of Directors which will establish a calendar that will complement the program and needs of the school.

**Benefits:** All employees will have at minimum the standard of benefits in accordance with the PCSB employees. The Board of Directors may approve additional benefits.

Personal and sick leave policies will be determined by the Board of Directors and approved through administration.

**Transfer/Resignation:** The school will consider an employee to have voluntarily resigned his or her employment if the employee does any of the following:

- Elects to resign from the school
- Fails to return from an approved leave of absence on the date specified by the school
- Fails to return to work without notice to the school for three (3) consecutive days

**Termination:** Employees of Berkley Accelerated Middle School should be supportive of the vision of the school and strive to fulfill the mission of the program in compliance with the Board of Directors of the school. If an employee is not performing successfully, he or she will be notified by the administration. After a reasonable time, if significant improvements in both performance and attitude have not been evidenced, as determined by the administration and the Board of Directors, employment may be terminated.

An employee may be terminated for any reason not prohibited by law, including a leave of absence in excess of 180 days, poor performance, misconduct, or other violations of the school's rules of conduct for employees. Any decisions to terminate employment may be appealed to the Board of Directors.

**Employment:** The school shall select its staff subject to all terms and conditions provided by law, School Board policy, and applicable collective bargaining agreements, if any.

All employees shall be Berkley Accelerated Middle School employees and Berkley will determine salaries and benefits. Berkley's employment practices shall be non-sectarian.

### **C. Disclosure of Teacher Qualifications**

Berkley Accelerated Middle School will have a well-trained, qualified staff with a faculty diverse in certification and training. Copies of staff vitas will be available for review in the school office and parents may request a copy of their child's teacher's vita, which will be provided to them without cost as required in the charter statutes. 1002.33,F.S.

### **D. Targeted Staff Size**

Targeted staff size and staffing plan will be determined by the administrative staff with the approval of the Board of Directors.

Teacher to student ratio will meet the class size reduction for all core academic subjects as placed in law by the Florida Legislature via SB30A.

### **3. Transportation**

#### **A. Provider**

Berkley Accelerated Middle School will contract transportation with Berkley Elementary Charter School, Inc. to provide transportation to the students at BAMS.

#### **B. Reasonable Distance**

Berkley Accelerated Middle School believes that a “reasonable distance” standard may be established based on the present transportation zone of Berkley Elementary Charter School, Inc. Other students who may be authorized to attend Berkley by lottery selection, but do not meet the reasonable distance requirement will be responsible for providing their own transportation.

#### **C. Equal Access**

Berkley Accelerated Middle School will contract with Berkley Charter School, Inc. to provide student transportation. We believe strongly that present transportation policies preclude any barriers to equal access.

#### **D. Desegregation Compliance**

Berkley Accelerated Middle School will comply with the court ordered desegregation plan.

#### **E. Food Service**

Under Florida Statutes (F.S.228.195) Berkley Accelerated Middle School will provide food service to students. We will provide lunch service to our students who would qualify for fee or reduced priced meals. Current USDA income and family size criteria will be used to determine which children are entitled to free and reduced price meals. The school will contract with an outside agency for their food service.

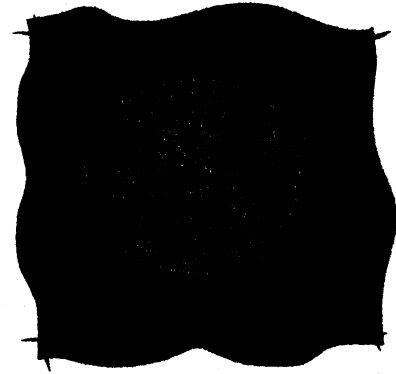
### **V. FINAL DOCUMENTATION**

#### **1. Facilities Safety Approval**

#### **2. Final Governance Documents**

#### **3. Insurance, Final Budgets, and Other**

**ATTACHMENT A:  
PROFILES OF BOARD  
MEMBERS**



**Chris Brauckmuller Contractor/President  
B.L. Smith General Contractors Inc.  
BUILDING AMERICA ONE HOUSE AT A TIME**

---

PO BOX 3669  
Winter Haven, FL 33885  
863.294.3949 Office  
863.291.3446 Fax  
blsmithg@tampabay.rr.com  
www.BandBcontractors.com

**OBJECTIVE:**

Our company goal is to build the best and affordable homes available. We want to achieve a goal of 20 to 30 homes per year, which we feel we can accomplish over the next three to five years.

**QUALIFICATIONS**

As a contractor, I have had many opportunities, over the last twelve years, to build a quality home for many families, be it a starter home, custom home, or retirement home. I have had an enormous amount of success in customer satisfaction. We feel that broadening our accessibility to the many people aspiring to have a perfect home built is very important. Our goals for building, selling, attention to detail and personal attention will always be our first priority.

**EDUCATION**

1985	Auburndale High School - High School Diploma
1986	Electrical Degree - Ridge Vocational Technical Center
1989	Associates of Arts Degree - Polk Community College
2002	Presently Attending- Capella University

**EMPLOYMENT**

2002-Pres	Vice President/Office Manager/Project Manager
1992-2002	President/Contractor B&B Contractors Inc. Plan Reading, Bid, Estimate, and Contracts for remodels, room additions, and new homes. Satisfied every customer and constantly get repeat and referral business.
1989-1992	Sub-Contractor B.L. Smith Gen Commercial work including forming, pouring, and finishing concrete, wood-steel-metal stud framing, drywall, tile, drop ceilings, welding and cutting. Concrete water release trenches, citrus concrete tank pads, preparation and construction and evaporator room engine tower pads. Tank farm preparation of bridges and towers.
1985-1989	Manager Champion Furniture Managed payroll, delinquent customer accounts, employees scheduling, hiring, and company moral. I was responsible for company vehicle safety and maintenance. I was also responsible for inventory control.

## **PAULA D. MCCURDY**

*4009 Carey Court    Auburndale, FL 33823    (863) 984-2369*

---

### ***EDUCATION***

- 1972 Graduated from Largo High School, Largo, Florida.
- 1976 Graduated from Milligan College, Johnson City, Tennessee; BA in English.
- 1989 Graduated from Nova University, Ft. Lauderdale, Florida; MS degree in Educational Leadership.

### ***TEACHING EXPERIENCE***

- Elizabethton High School, Elizabethton, Tennessee; 1976-1977. English teacher for grades 9, 10, 11.
- Northeast High School, St. Petersburg, Florida; 1978-1982. English teacher for grades 9 and 10.
- Largo High School, Largo, Florida; 1986-1990. English teacher for grades 9 and 10.
- Haines City High School, Haines City, Florida; 1990 – 1996. English teacher for JTPA program; PLATO Lab Manager.
- Auburndale High School, Auburndale, Florida; 1996 to present. English teacher for grades 9 and 10; PLATO Lab Manager.

### ***RELATED TRAINING/ACCOMPLISHMENTS***

- Completed Florida Performance Measurement System training
- Completed five-day Kagan Cooperative Learning training
- Completed Compass Lab management training
- Completed CRISS training
- Served as school improvement facilitator
- Served as peer teacher
- Wrote curriculum for state dropout prevention program
- Wrote federal grants

### ***RELATED ACTIVITIES/MEMBERSHIPS***

- Member of Polk City Elementary School SAC, 1999-2000
- Member of Berkley Elementary School SAC, 2000 to present
- Chairperson for Berkley Elementary School SAC, 2002 to present
- Member PCCTE

## **Chris Thompson**

667 Old Berkley Road  
Auburndale, FL 33823  
(863) 984-3085 (H)  
(863) 551-3745 (W)

### **Professional Experience:**

November 1992 to Present: The Coca-Cola Company

Human Resources Manager, Auburndale, FL – November 2002 to present  
Responsible for all aspects of Human Resource operations at the Main Street plant of Coca-Cola North America. Also responsible for plant security, safety and community relations. The Human Resources function of the Auburndale Primary Warehouse also reports into Main Street HR. Manage a staff of two with a total plant population of 91 as of August 2003, expected to grow to 300 by 2006.

Human Resources Manager, Atlanta, GA - July 1998 to November 2002  
Responsible for employee relations case management, training delivery, managerial coaching and counseling, team building and team development, compensation analysis, stock option and cash incentive administration, EEO analysis, staffing and talent development. Support the Technical Division including Commercial Product Supply with over 2000 people in the group. Lead a distributed work team of nine global HR professionals supporting supply operations. Lead the development of Human Capital Plans for Corporate CPS and each plant in the system.

Human Resources Manager, Swaziland, Africa - February 1997 to July 1998  
Responsible for all aspects of HR support to a concentrate plant of 100 associates. Handled expatriate compensation, staffing, benefits, employee relations and communications. Served on the Boards of the Federation of Swaziland Employers and Swazimed (Medical Aid association). Negotiated better medical aid coverage from Swazimed to increase options available to associates. Recruited and trained a Swazi national as a replacement before my return to the United States.

Sr. Compensation Planning Analyst, Atlanta, GA - November 1992 to January 1997  
Responsible for all compensation projects for client groups of Technical, Product Integrity, Finance, Legal and Coca-Cola Fountain. Handled job evaluations, salary offers, equity analysis, stock option and cash incentive compensation programs for Corporate and field locations. Designed the first variable cash compensation program for a manufacturing site in Swaziland, Africa.

April 1991 to November 1992: Criterion, Inc., Irving, Texas

Consultant

Responsible for the Compensation and Succession Planning lines of business. P&L responsibility, managed all aspects of client relationships and consulting projects.



Managed, trained and developed staff consultants and analysts responsible for data collection and analysis. Assisted in design of new succession planning software package.

April 1987 to April 1991: KPMG Peat Marwick, Dallas, Texas

Senior Consultant  
Consultant

Responsible for all aspects of base salary consulting engagements, performance appraisal system design and training, computerized job evaluation systems, incentive plan design, salary surveys and organization development. Served on National Practice Committee for the design and development of a new computerized job evaluation software package. Assigned to NASA Johnson Space Center for 12 months. Job responsibilities included organization development consulting, training design and delivery, and conducting, analyzing and reporting on a workplace climate survey.

June 1985 to April 1987: The Wyatt Company, Dallas, Texas

Compensation Analyst

Responsible for analysis of salary data, design and completion of salary surveys, statistical analysis of job evaluation projects, training delivery, analysis of climate survey data and development of performance appraisal programs and documentation. Created several enhancements to the proprietary multiple regression based job evaluation system MULTICOMP.

**Education:**

1985 M.A. in Industrial / Organizational Psychology, The University of Tulsa.  
GPA 3.80.  
1983 B.S. Central Michigan University. GPA 3.13. Major: Psychology, Minor:  
Chemistry.

**Memberships and Certifications:**

Society of Human Resource Management  
Polk Works Board Member  
Education Committee of the Auburndale Chamber of Commerce  
Certified Compensation Professional  
Certified to administer, score and interpret the Myers-Briggs Type Indicator  
Certified to train Maximizing Performance (Development Dimensions International)  
Certified in Targeted Selection (Development Dimensions International)

# DENNIS W. YOUNG

254 Lake Tennessee Dr.  
Auburndale, FL. 33823  
H (863) 984-5310  
W (407) 939-4902

## **JOB OBJECTIVE:**

## **QUALIFICATION SYNOPSIS:**

Twenty years in a management position dealing with engineering / maintenance concerns and personnel policy procedures. Experienced in project management, maintenance, construction, drafting, planning, scheduling, and estimating. Guest speaker on Resorts Engineering topics at University of Central Florida.

## **EXPERIENCE:**

### **WALT DISNEY WORLD Sr. Project Manager – Facility Asset Management**

Responsible for the overall planning, budgeting, and field execution of multiple projects throughout the Resorts Division. Specific properties of responsibility include Saratoga Springs, Caribbean Beach Resort, Pop Century, Fort Wilderness, Wilderness Lodge and Port Orleans. Responsible for overall projects relating to pools, pool equipment, paving, automated external defibrillator deployment, and fire sprinkler recall change out. Responsible for a team consisting of two Project Managers, four Planners, three Field Representatives and three Office support. Financial responsibility of between \$13M and \$14.5M.

### **WALT DISNEY WORLD Manager - Downtown Disney Engineering**

Directly responsible for the engineering / maintenance of the Marketplace, Pleasure Island, and the Westside. Includes maintenance of roofs, kitchen equipment, show equipment, air conditioning systems, lighting systems, plumbing systems, painting and carpentry repairs. Develop and implement new policies for the department that will enhance operations and be cost effective. Review drawings and specifications of major projects and give recommendations to Walt Disney Imagineering, Disney Development Co. and Facility Asset Management. Assist in the coordination of projects and evaluate finished project for defects with the project team. Establish property master plan. Coordinate yearly Facility Asset Management input for various properties under my responsibility.

Responsible for four (4) engineering services managers, 75 hourly cast members, clerical and craftworkers, with a budget of \$ 6 million.

### **WALT DISNEY WORLD Manager - Resort Engineering Services / Research and Development**

Directly responsible for Resorts Landscaping, Pest Control, and Resorts Decorating. Staff responsibility for six (6) existing resort locations and four (4) resort properties in development. Responsibility included creating and implementing policy changes to enhance the Resorts Maintenance Division. Provided maintenance consulting expertise to Resort Operations, Maintenance Operations, Planned Work, Disney Development Co., Resort Development Co., Resort - Landscaping, Pest Control, and Decorating.

Directly responsible for two (2) managers, nine (9) assistant managers, and 130 craftworkers. Staff responsibility for six (6) managers, 18 assistant managers, and 242 craftworkers.

**EXPERIENCE CONTINUED:**

Performed and participated in developing and controlling expense and capital budgets, property reviews, energy conservation programs, manpower planning and development, and corporate programs. Other duties included member of Safety Steering Committee, and Resort Design Specifications Team, and past member of the labor negotiation team (1990 & 1993).

**WALT DISNEY WORLD Manager - Building and Support Maintenance Magic Kingdom.**

Responsible for the maintenance of roofs, walls, ceilings, facades, plumbing systems, air conditioning systems, kitchen equipment, walkways, railings, planters and bridges. Responsibility included creating and implementing policy changes to enhance the Maintenance Division. Responsible for two (2) superintendents, 12 supervisors, and 158 craftworkers. Other duties included Facilities 1 and Duty Manager of the MAGIC KINGDOM as scheduled.

**WALT DISNEY WORLD Project Superintendent - Parks Planned Work**

Responsible for developing detailed job package, utilizing drawings and specifications. Responsible for planning, coordinating, expediting, and controlling detailed planning requirements to determine job scope, method, work sequence, manpower requirements, capital and expense costs, duration of job and scheduling contractor work prior to start of job. Worked closely with Purchasing, Estimating, Area Maintenance, and Area Operations Divisions.

**AIR FLOW DESIGNS CORPORATION Assistant to the Corporation President**

Served as Chief Planner and Estimator, and Head of Engineering Design for heating, ventilation, and air conditioning (HVAC) systems. Supervised, hired, and disciplined employees; reviewed and corrected as built drawings; established account receivable and cost analysis systems and procedures; negotiated contracts with builders; coordinated projects in the field with other construction trades; assisted in establishing corporate policies and management decisions.

**EDUCATION:**

University of Central Florida  
Bachelor of Arts Degree

Florida Institute of Technology  
Master of Business Administration Degree

**LICENSES:**

State of Florida Certified Mechanical Contractor CM-C018899  
State of Florida Registered Air Conditioning Contractor, Class "B" RA0033662 (Inactive)  
State of Florida Real Estate License 0178623 (Inactive)

**Volunteer Work:**

Member, Lake Julianna Reserve Board of Directors (current)  
Chairman, Lake Julianna Reserve Architectural Committee (current)  
Member, Friends Community Church Building Committee (1994 – 1996)  
Member, Friends Academy Board of Directors (1996 – 1999)  
Participated in discussion groups concerning TECH PREP in Orange Co.

**ATTACHMENT B:  
EVIDENCE OF SUPPORT  
LETTERS**



53 Lake Morton Drive  
Lakeland FL 33801-5344  
863.688.8841  
863.687.1828 FAX  
www.bayliscpas.com

August 26, 2003

The Honorable Frank O'Reilly  
Chairman  
Polk County School Board  
Bartow, Florida 33830

Re: Berkley Accelerated Middle School.

Honorable Frank O'Reilly and members of the School Board:

Our firm has submitted a proposal to be the auditor of record for the Berkley Accelerated Middle School for the year ended June 30, 2004. We have conducted both the financial and governmental compliance audits of numerous not for profit organizations, including various charter schools in Polk, Hillsborough and Orange Counties. We have experience in preparing GASB 34 financial statements and have assisted many of our clients through the conversion process. During our twenty three years of existence as a firm, we have obtained the requisite skills to assist the Berkley Accelerated Middle School in monitoring and reporting on their compliance with laws, rules, regulations and grant requirements of a charter school. We have the ability to assist them with all other financial aspects of the School's operations, as well.

Thank you for your consideration of Berkley Accelerated Middle School's application to become a charter school.

Sincerely,

A handwritten signature in cursive script that reads 'Edith L. Yates'.

Edith L. Yates

ELY:cab

CERTIFIED PUBLIC ACCOUNTANTS  
MANAGEMENT CONSULTANTS  
American Institute of Certified Public Accountants  
Private Companies Practice Section  
Florida Institute of Certified Public Accountants

# *Mulling* INSURANCE AGENCY, INC.

208 E. PARK, P. O. BOX 308  
AUBURNDALE, FL. 33823  
PHONES: (863) 967-4454  
FAX: (863) 967-7592  
18 N. 6TH ST., P. O. BOX 96  
HAINES CITY, FL. 33845  
PHONE: (863) 421-1900  
FAX: (863) 421-0517

DATE: August 16, 2003  
To: School Board of Polk County  
RE: Proposed New Middle School

To Whom It May Concern:

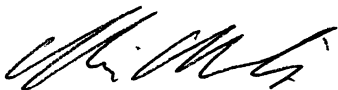
This letter is to confirm our support and recommendation for the proposed "Berkley Middle School". Our community is in great need of an additional middle school, as our existing school is reaching (or has reached) its maximum capacity. Not to mention, the area in which the proposed school would be located is among the fastest growing areas in the county.

Additionally, we feel that the administrative leadership and academic excellence demonstrated at the existing Berkley Charter School (Berkley Elementary) should be rewarded and duplicated, as it is a tremendous benefit to the community.

As Auburndale residents, our agency owners and our other 25 employees would like to extend our support to the proposed school and will continue to do whatever we can to see that our community's young people get what they deserve- the highest quality education available.

Sincerely,

Mulling Insurance Agency, Inc.



Kevin Mulling  
Vice President



GRANT IT, INC.

FLOOR COVERINGS

To whom it may concern,

We are very much in favor for the Middle School to go up at Berkley. Our children and many others will benefit from this greatly. We will do whatever we can to see this go through.

Sincerely,



Nicole Grant  
President

Mr. Randy Borland  
Berkley Elementary School  
2020 Berkley Road  
Auburndale Fl. 33823

August 13, 2003

Dear Mr. Borland.

It takes a person of vision and dedication to be ready for the future and that is just what you and your team are doing by seeking to establish a Charter Middle School that will be located next to Berkley Elementary.

After listening to you and Jill Bolender discuss the vision and timetable for this earnest endeavor I would like to lend my support for this initiative. The plan and ultimate outcome will accomplish a number of items for the children of this area:

This school will be fed from Berkley Charter School (Elementary) where there are currently high standards of instruction and a history of learning. It would be my hope that the children at Berkley Charter School would be able to continue in the same manner of learning at the Charter Middle School.

School crowding is a major concern for teachers, parents, students and administrators. The phased approach to opening, staffing, and teaching at this Charter Middle School achieves a good student to teacher ratio while maintaining continuity of instruction methodology for the student.

Perhaps one of the most important aspects of having this Charter Middle School for the children is the friendships that were developed at Berkley Charter School will continue into the higher grades.

I look forward to serving as a member of the board for the Charter Middle School and look to the future when this school becomes a reality.

Sincerely.



Dennis Young  
254 Lake Tennessee Dr.  
Auburndale Fl.

Cc: Jill Bolender





August 17, 2003

Mrs. Jill Bolender, Assistant Principal  
Berkley Charter Elementary School  
5024 Berkley Road  
Auburndale, Florida 33823

Dear Mrs. Bolender,

I am writing to confirm my support for Berkley Talent Development Middle School. As Berkley Charter Elementary School expands to grades 6-8 over the next three years, I believe it will enhance the learning environment for all children who attend, and will attract students of all backgrounds to the school.

I look forward to serving on the Board of Berkley Talent Development Middle School. I have a strong interest in education, having taught at Georgia State University's Saturday School for gifted students, serving on the Auburndale Chamber's Education Committee, and having three children of my own in Auburndale schools. I also have a business background I will use to assist the School in meeting its educational goals.

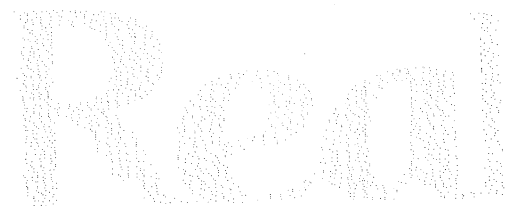
Berkley Elementary has enjoyed much success (as evidenced by FCAT scores) in the time it has been open, and I expect the change to Charter status to accelerate that success. The addition of a Middle School, and the process by which you propose to expand, will provide the students continuity and consistency in education that will position them for success far beyond their formal education.

I am pleased to be a part of your plans for Berkley Talent Development Middle School and look forward to serving on its Board.

Sincerely,

A handwritten signature in black ink that reads "Chris Thompson". The signature is written in a cursive style with a long, sweeping underline.

Chris Thompson  
Human Resources Manager  
Main Street Plant  
Auburndale, Florida



## Williams-Hess Insurance

1617 E Gary Rd  
Lakeland FL 33801  
863-682-5195 fax 863-686-3051

08-18-03

Berkley Charter

Attn: Jill Bolender

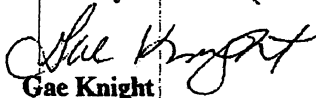
I think expanding Berkley Charter through the 8<sup>th</sup> grade is an excellent idea. I definitely would support this effort.

If I had the choice to keep my child at the school she had been attending or moving her to a new environment and new location for middle school, there is no doubt I would prefer keeping her at the school she had been attending for the past 4 years.

I feel very comfortable with the staff and supervision of Berkley Charter and feel expanding through the 8<sup>th</sup> grade would benefit the children enrolled there.

I would like to see the school limit enrollment to only students that attended Berkley Elementary. I feel this would keep the environment stable for our children.

Sincerely



Gae Knight

Mother of Stormy Stoltz: 5<sup>th</sup> grader @ Berkley Charter  
203 Whitecliff Blvd Auburndale FL 33823

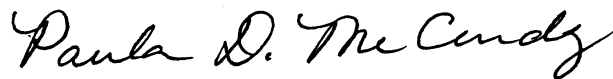
4009 Carey Court  
Auburndale, FL 33823  
August 17, 2003

To Whom It May Concern:

For the past three years, the Auburndale community has enthusiastically supported the creation of a charter middle school. Educators, community members, and business leaders have worked diligently to design an academic program that will produce world-class learners. Their vision is to establish a middle school that will provide an accelerated learning path for all students. Our children and our community will greatly benefit from a small middle school committed to high academic standards.

As a parent of two elementary children and as an educator, I fully support the efforts to make this vision a reality. I consider it an honor to serve on the board of directors for Berkley Talent Development Middle School.

Sincerely,

A handwritten signature in cursive script that reads "Paula D. McCurdy".

Paula D. McCurdy

August 21, 2003

Polk County School Board  
Berkley Charter School  
5240 Berkley Road  
Auburndale, FL 33823

To whom it may concern:

This letter is to inform you of my support for Berkley Charter Middle School.

As a parent of a student currently enrolled in Berkley Elementary Charter School, I feel the freedom allowed to charter schools to be more innovative and creative to be in the best interest of the children. I also feel the charter schools demonstrate better student performance and accountability from parents which are not required in the traditional public school system. I feel Berkley Elementary Charter School has proven its responsibility and role to the students and parents in the elementary division.

Berkley Elementary Charter School has been a great asset to the students and local community and I feel a charter middle school will continue the development and performance of those elementary students.

Sincerely,

  
Kim Brooks

# CHAMPIONS GATE



DATE: August 18, 2003

TO: School Board of Polk County

RE: Proposed New Middle School

To Whom It May Concern:

We would like to take this time to pledge our support for the proposed "Berkley Middle School." Our community and this area would benefit greatly with the addition of this middle school as our present school has already reached its maximum capacity. We have seen many families relocate to this area in the past three years and now, with the expansion of I-4, I feel it will only continue to grow at an even faster pace.

We cannot express enough, the gratitude that is felt toward the administration at Berkley Charter and the strength of their leadership. The children attending there are very happy and have truly risen to their full potential because of the excellent teaching staff.

It is our full intention to support this proposed school and do whatever is necessary to insure the highest quality education for our young people in this community.

Sincerely,

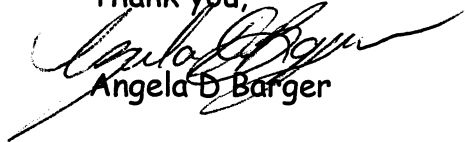
Champions Gate Community &  
Golf Resort

Robert K. Ellis  
Golf Course Manger

To Whom This May Concern:

This letter is to inform you that our family is in favor of Berkley Charter adding a middle school. We have been very pleased with Berkley Charter School and the staff. We like the fact that Charter schools are held strictly accountable for academic and financial results. We feel that our children would excel in an institution that is more tightly governed by the school itself. We are grateful that our son has the opportunity to attend Berkley elementary school and would love for him to continue his education in the Charter school environment. Therefore, we feel adding a middle school to Berkley Charter would be a great benefit.

Thank you,



Angela D Barger

August 20, 2003

To Whom It May Concern,

This letter is to show absolute approval and very strong recommendation for the proposed Berkley Middle School.

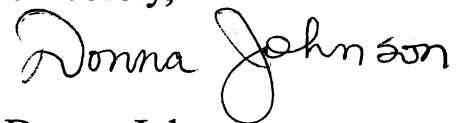
As the parent of a middle school child, I would have loved the opportunity for him to continue his education right in our own community. Instead, he has to travel approximately 30-45 minutes each way to attend our closest middle school.

This area of our county is growing rapidly and is in great need of an additional middle school. New housing areas are being developed every day and we can not expect the few middle schools we have in this area to be able to handle many more students.

The staff at Berkley Charter School are very dedicated to the children of our community and it is my opinion that they would do a tremendous job if given the opportunity to establish a middle school for this area.

As a Polk City resident I feel that granting approval for Berkley Middle School would only be beneficial for this community and I will give my support in any way possible.

Sincerely,

A handwritten signature in cursive script that reads "Donna Johnson". The signature is written in black ink and is positioned above the printed name.

Donna Johnson



UNILEVER

**Home and Personal Care - NA**

4833 Lake Julliana Reserve • Auburndale, Florida 33823 • (863) 984-5832 • (863) 984-3453 fax

August 22, 2003

Board of County Commissioners - Polk  
Drawer BC01  
P.O. Box 9005  
Bartow, Fl. 33831-9005

**Re: Berkley Charter Middle School**

Commissioners:

I would like to confirm my full support for the proposed Berkley Charter Middle School initiative. This new resource will not only help ease the strain of potential overcrowding at the surrounding area schools but will also give our residents a stronger sense of community. It would truly be wonderful for the hundreds of children in this area to have a middle school to call their own.

As a Berkley Elementary parent, I can confidently say that the school's leadership and staff are dedicated to providing the highest caliber of education for all of our students. Their commitment and compassion for our kids has translated into a great learning environment. That enthusiastic pursuit of excellence would be invaluable to the middle school effort.

I am very excited about the vision of Berkley Charter Middle School and the bright future it will afford our children.

Regards,

Stephen A. Driggers  
Customer Business Manager

SAD/ms

Cc: Jill Bolender  
Randy Borland



**ATTACHMENT D:  
INSURANCE ESTIMATES**

# Mulling INSURANCE AGENCY, INC.

208 E. PARK, P. O. BOX 308  
AUBURNDALE, FL. 33823  
PHONES: (883) 967-4454  
FAX: (883) 967-7592  
18 N. 8TH ST., P. O. BOX 96  
HAINES CITY, FL. 33845  
PHONE: (883) 421-1900  
FAX: (883) 421-0617

August 12, 2003

Berkley Charter School  
Attn: Jill Bolender  
5240 Berkley Rd  
Auburndale, FL 33823

Dear Jill:

Per your request, please see following projected insurance rates for the proposed Berkley Middle School.


<u>Exposure</u>	<u>Coverage Summary</u>	<u>Annual Premium</u>
General Liability (Basis: 100 Students)	\$1,000,000 Per Occurrence limit \$2,000,000 Aggregate limit	\$2,500
Crime Coverage	\$50,000 Employee Dishonesty	\$ 400
Directors & Officers Liability	\$1,000,000 Per Occurrence limit	\$4,000
Workers Compensation	\$1,000,000 Employers Liability limit	<u>\$2,646*</u>
Total Estimated Annual Premium:		\$9,546

\*Current workers compensation rate is 1.26 per \$100 of payroll for all teachers/administrators. This annual premium is based on 7 teachers/administrators averaging \$30,000/yr (\$210,000).

Please contact me with any other questions on this matter.

Sincerely,

Mulling Insurance Agency, Inc.

  
Kevin Mulling  
Vice President



**ATTACHMENT E:  
DISASTER PLAN**

**BERKLEY ACCLERATED MIDDLE SCHOOL**  
**CRISIS PLAN 2004-2005**

**FIRE:**

Fire drills are generally held once a month. Below is the procedure to follow for evacuation of the building:

- The fire alarm bell will be used as the signal. (intermittent beeps)
- Children leave by way of assigned route in a silent single line. Lights should be turned off. Fire drill routes are to be visibly posted for each individual room.
- Class lines should walk to designated area and wait until further instructions.
- Teacher takes roll book to ascertain all pupils are with him/her. Roll should be called and notify monitors of any missing persons.

The school bell will ring to announce that it is safe to return to the building.

**TORNADOES:**

***TORNADO WATCH:*** (Conditions are favorable for tornado)

The staff will be notified of weather conditions. Teachers in portables will move with their students to their designated area.

***TORNADO WARNING:*** (Tornado has been sighted in the area)

The tornado signal will be given over the intercom.

- Teachers must carry class roll books to the assigned shelter area and account for all students upon reaching the area.
- Coaches will round up students on the play ground and move them to a safe and sheltered location, preferably their classrooms.
- Students will get under their desks with their faces away from windows and glass. They will be in a crouched position with their hands covering their neck and head. All students should be as far from glass as possible.
- Absolute silence must be enforced.
- Provisions must be made to leave a window open in each classroom in use. Where possible, on the opposite side from the approaching tornado.
- Spotters should be in the following positions:  
Teacher 1- looking toward the S, SW, and W  
Teacher 2- looking toward the N, NE, and E  
Teacher 3- looking toward the W, NW, and N  
Teacher 4- looking toward the E, SE, and S
- The spotters will also look for students on walkways and immediately put them in a classroom and notify the office of the whereabouts of that child.
- Secretary will monitor the battery operated weather radio communication system.
- Do Not let students leave your classroom for any reason.
- The director or designee will signal to return to normal operation.

**BOMB / BOMB THREATS**

- The following announcement will be made: **“Code Package- We must evacuate the building.”**
- Evacuate following the same procedure that we do for fire drills.
- Teachers must carry class roll books to their assigned area and account for all students upon reaching the area.

**GUN/ WEAPON**

- Send sealed message with trusted student to the office.
- If a student threatens you, follow the suspect's directions. Don't try to be a hero.

**SNIPER OR ARMED INTRUSION PROCEDURES:**

1. **Sniper-** Code is **“DROP!”** Students must drop to the ground/ get under desk or table immediately. The students must be as quiet as possible.
2. **Armed Intrusion-** Code is **“Teachers/Staff, please lock your doors.”**
3. Designated people will lock outside doors leading to public buildings. (Cafeteria, etc.)
4. Office staff will call “911”
5. If students are outside, they will be told to fall flat on the ground and stay there.
6. Classroom teachers will account for their students. If a student is not in the classroom, they will notify the office via the intercom. The administrators will attempt to locate the student(s) via the intercom.
7. Any injuries will be reported to the office via the intercom.
8. Telephones and/or two-way radios will be used to advise the police as to the location of the sniper/intruder.
9. The media will be advised to stay off campus. The principal or designated person will be responsible for talking with the media. (Truthful, accurate information will be shared ASAP with the staff, students, parents, and media by the principal or designee.)

**SEVERE WEATHER / THUNDERSTORM/ LIGHTNING:**

- Get out of open areas and into an enclosed building as quickly as possible upon the approach of the storm.
- Do not seek shelter under isolated trees or close to metal fences, playground equipment, or shelters in exposed locations.
- Stay indoors
- Stay away from open doors and windows, metal objects, electrical appliances, and plumbing until the storm has passed.
- Keep telephone use to a minimum.

**HAZARDOUS MATERIALS:**

An announcement over the intercom will let you know if **possible toxic chemicals have been emitted in our area**. The Superintendent of Schools or the Red Cross will notify school personnel concerning the evacuation procedure to be used. (Students may be dismissed to go home or evacuated to nearby churches or large buildings.)

If we are ordered to evacuate:

Teachers:

1. Carry roll/grade books to the evacuation site.
2. Make sure your students are under your supervision.
3. Make a list of students leaving campus when called to the office. Students will remain with their class unless they are released to the proper authority (parents, police, school officials, etc. ) The administration will let you know when it is safe to return to school.

Secretaries:

Will gather the emergency information books to take to evacuated site.

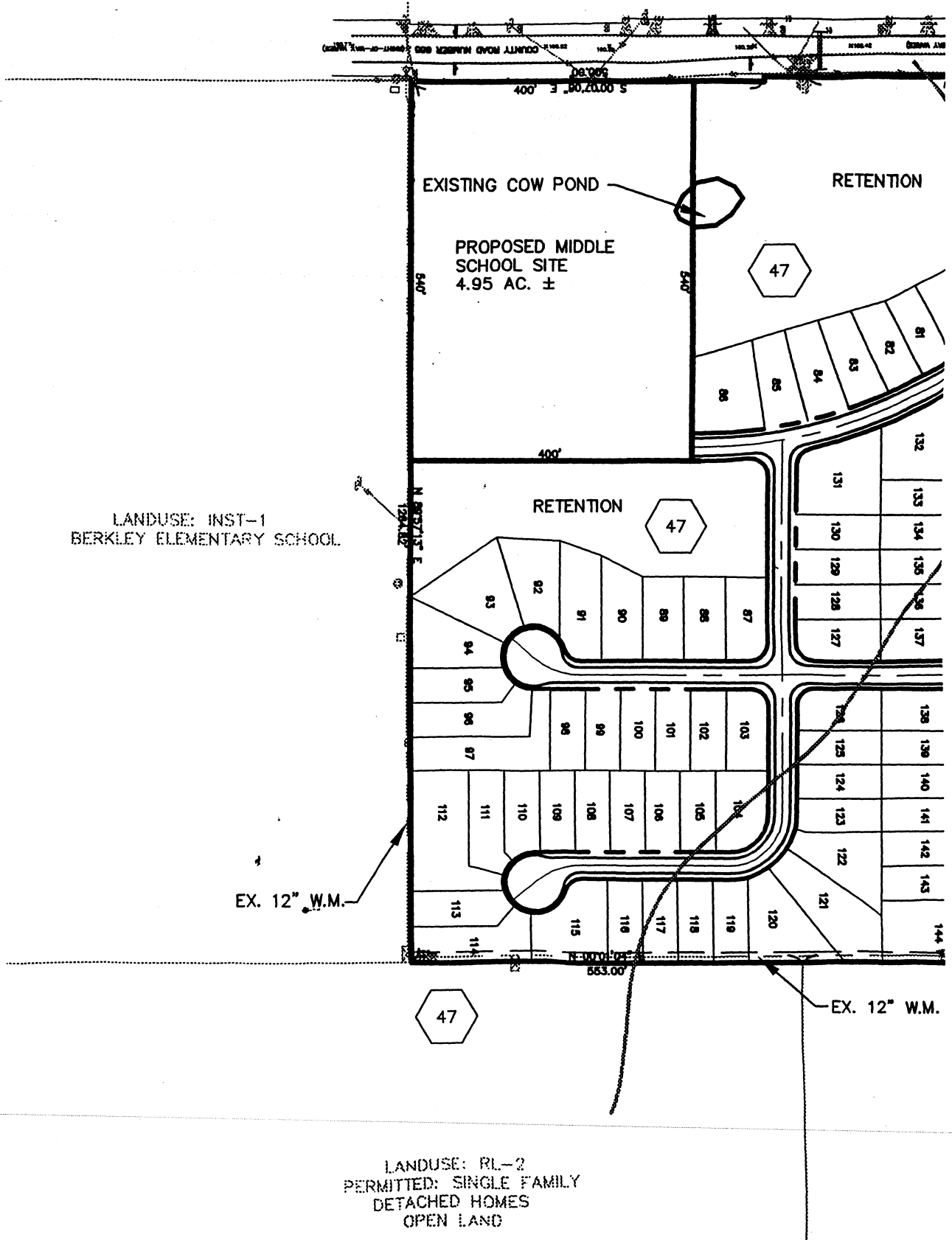
**HOSTAGE SITUATION:**

- A. Intercom will transmit the message to alert the staff – **“Lock Tight”**
- B. All doors will be locked
- C. Allow NO ONE to enter or leave the room
- D. Notify the office if a visitor attempts to get in the room
- E. Keep students as calm as possible.
- F. Out of class students are to be gathered by the nearest teacher and the office notified as to their whereabouts.

Once the situation has passed the code will be announced, **“Unlock”**.

**ATTACHMENT F:  
PROPOSED SITE  
LOCATION**

LANDUSE: RL-2  
 PERMITTED: SINGLE FAM  
 DETACHED HOMES  
 SINGLE FAMILY HOMES







**ATTACHMENT C:  
FINANCIAL DOCUMENTS**

**BERKLEY MIDDLE CHARTER SCHOOL  
AUGUST 27,2003**

Revenue Estimates

Staffing

Budget Projections

Financial Summary

Note: All projections are based on 2003-04 funding levels.

## Revenue Estimate Worksheet for Sample Conversion Charter School

Based on the Second Calculation of the FEFP 2003-04

School District: **Polk** Berkley Middle School 2004-05

1. 2003-2004 FEFP State and Local, Funding  
 Base Student Allocation \$3,630.03

District Cost Differential: 0.9614

Program	Number of FTE	Program Cost Factor	Weighted FTE (b) x (c)	2003-04 Base Funding WFTE x BSA x DCD
(a)	(b)	(c)	(d)	(e)
101 Basic K-3		1.002	0.0000	\$ -
111 Basic K-3 with ESE Services		1.002	0.0000	\$ -
102 Basic 4-8	87.00	1.000	87.0000	\$ 303,622
112 Basic 4-8 with ESE Services	13.00	1.000	13.0000	\$ 45,369
103 Basic 9-12		1.140	0.0000	\$ -
113 Basic 9-12 with ESE Services		1.140	0.0000	\$ -
254 ESE Level 4 (Grade Level PreK-3)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 4-8)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 9-12)		3.948	0.0000	\$ -
255 ESE Level 5 (Grade Level PreK-3)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 4-8)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 9-12)		5.591	0.0000	\$ -
130 ESOL (Grade Level PreK-3)		1.298	0.0000	\$ -
ESOL (Grade Level 4-8)		1.298	0.0000	\$ -
ESOL (Grade Level 9-12)		1.298	0.0000	\$ -
300 Vocational (Grades 9-12)		1.190	0.0000	\$ -
<b>Totals</b>	<b>100.00</b>		<b>100.0000</b>	<b>\$ 348,991</b>

2. ESE Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student	
Additional Funding from the ESE Guaranteed Allocation.		K-3	251	\$ 978	\$ -
Enter the FTE from 111,112, & 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. The total should equal all FTE from programs 111, 112 & 113 above.		K-3	252	\$ 3,159	\$ -
		K-3	253	\$ 6,446	\$ -
	13.00	4-8	251	\$ 1,097	\$ 14,261
		4-8	252	\$ 3,278	\$ -
		4-8	253	\$ 6,565	\$ -
		9-12	251	\$ 781	\$ -
		9-12	252	\$ 2,961	\$ -
		9-12	253	\$ 6,249	\$ -
<b>Total FTE with ESE Services</b>	<b>13.00</b>			<b>Total from ESE Guarantee</b>	<b>\$ 14,261</b>

3. Supplemental Academic Instruction:					
District SAI Allocation divided by district FTE (with eligible services)	\$ 21,613,890		82,107.43	Per Student \$ 263	\$ 26,300
4. Summer Reading Programs : Non-recurring funds Allocation divided by district FTE (with eligible services)	\$ 808,687		82,107.43	Per Student \$ 10	\$ 1,000
<b>Total Base Funding, ESE Guarantee, SAI, and Summer Reading Program</b>					<b>\$ 390,552</b>

5. Class size Reduction Funds:	Weighted FTE aggregated from input in Section 1	DCD	Allocation factors	
PreK - 3	0.0000	X 0.9614 X	180.65	= 0
4-8	100.0000	X 0.9614 X	163.79	= 15,747
9-12	0.0000	X 0.9614 X	160.74	= 0
<b>Total</b>	<b>100.0000</b>			<b>Total Class Size Reduction Funds \$ 15,747</b>

(\*Total FTE should equal total in Section 1, column (d).)

<b>6A. Divide school's Weighted FTE (WFTE) total computed</b>			
in (d) above:	<u>100.000</u>	by district's WFTE:	<u>88,180.28</u>
to obtain school's WFTE share.			0.1134%
<b>6B. Divide school's Unweighted FTE (UFTE) total computed</b>			
in (b) above:	<u>100.000</u>	by district's UFTE:	<u>82,107.43</u>
to obtain school's UFTE share.			0.1218%
<b>6C. Divide school's High School Unweighted FTE (UFTE) total computed</b>			
in (b) above:	<u>0.000</u>	by district's UFTE:	<u>82,107.43</u>
to obtain school's UFTE share.			0.0000%
Refer to Note:			
<b>7. Other FEFP (WFTE share)</b>		(a)	
Applicable to all Charter Schools:			<u>\$ 2,218,648</u> x 0.1134% = <u>\$ 2,516</u>
Declining Enrollment	\$ <u>0</u>		
Sparsity Supplement	\$ <u>0</u>		
Hold Harmless	\$ <u>0</u>		
Program Related Requirements:			
Safe Schools	\$ <u>2,218,648</u>		
<b>8. Discretionary Millage (WFTE share)</b>		(d)	<u>13,241,726</u> x 0.1134% = <u>\$ 15,016</u>
<b>9. Discretionary Tax Equalization Allocation (UFTE share)</b>		(b)	<u>0</u> x 0.1218% = <u>\$ -</u>
<b>10. Discretionary Lottery (WFTE share)</b>		(a)	<u>3,732,164</u> x 0.1134% = <u>\$ 4,232</u>
<b>11. Instructional Materials Allocation (UFTE share)</b>		(b)	<u>7,085,526</u> x 0.1218% = <u>\$ 8,630</u>
Science Laboratory Materials (high school only)		(c)	<u>129,967</u> x 0.0000% = <u>\$ -</u>
<b>12. Public School Technology (UFTE share)</b>		(b)	<u>1,613,907</u> x 0.1218% = <u>\$ 1,966</u>
<b>13. Teacher Training (UFTE share)</b>		(b)	<u>1,163,707</u> x 0.1218% = <u>\$ 1,417</u>
<b>14. Student Transportation</b>		(e)	
<b>15. Florida Teachers Lead Program Stipend</b>		(f)	
<b>16. Food Service Allocation</b>		(g)	
<b>17. Revenue available from other sources.</b>			

<b>18. 1998-99 Hold Harmless Calculation</b> <i>(Only if this charter school was in operation prior to July 1, 1999)</i>			
Base Student Allocation:	\$3,223.06	District Cost Differential:	0.9678
	<b>Program</b>		<b>Base</b>
	<b>UFTE*</b>	<b>Cost Factor</b>	<b>Funding</b>
1998-1999	x 1.399 =	0.000	x BSA & DCD = \$ -
2003-2004	@	Base funding + SAI (\$263 per UFTE) = \$ -	
			Change \$ -
<small>*Enter only FTE of students meeting criteria for Dropout Prevention Program</small>			
<small>If your school is eligible and only if the change is a positive number, enter change amount manually in the right hand column.</small>			

NOTES:

(a) District allocations multiplied by percentage from item 6A.	Total	<u>\$ 440,076</u>
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- (b) District allocations multiplied by percentage from item 6B.
- (c) District allocations multiplied by percentage from item 6C.
- (d) Proceeds of millage levy multiplied by percentage from item 6A.
- (e) Consistent with Chapter 1006.21, Florida Statutes and DOE Student Transportation General Instructions
- (f) Teacher Lead Program Allocation per 1012.71, Florida Statutes
- (g) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

*Administrative fees charged by the school district shall be calculated based upon 5 percent of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 501 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in 1013.62(2) F.S. To calculate the administrative fee to be withheld for schools with more than 500 students, divide the school population into 500. Multiply that fraction times the funds available, then times 5%.*

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*

## Revenue Estimate Worksheet for Sample Conversion Charter School

Based on the Second Calculation of the FEFP 2003-04

School District: **Polk**      Berkley Middle School      2005-06  
 1. 2003-2004 FEFP State and Local, Funding  
 Base Student Allocation      \$3,630.03      District Cost Differential:      0.9614

Program	Number of FTE	Program Cost Factor	Weighted FTE (b) x (c)	2003-04 Base Funding WFTE x BSA x DCD
(a)	(b)	(c)	(d)	(e)
101 Basic K-3		1.002	0.0000	\$ -
111 Basic K-3 with ESE Services		1.002	0.0000	\$ -
102 Basic 4-8	174.00	1.000	174.0000	\$ 607,244
112 Basic 4-8 with ESE Services	26.00	1.000	26.0000	\$ 90,738
103 Basic 9-12		1.140	0.0000	\$ -
113 Basic 9-12 with ESE Services		1.140	0.0000	\$ -
254 ESE Level 4 (Grade Level PreK-3)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 4-8)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 9-12)		3.948	0.0000	\$ -
255 ESE Level 5 (Grade Level PreK-3)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 4-8)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 9-12)		5.591	0.0000	\$ -
130 ESOL (Grade Level PreK-3)		1.298	0.0000	\$ -
ESOL (Grade Level 4-8)		1.298	0.0000	\$ -
ESOL (Grade Level 9-12)		1.298	0.0000	\$ -
300 Vocational (Grades 9-12)		1.190	0.0000	\$ -
<b>Totals</b>	<b>200.00</b>		<b>200.0000</b>	<b>\$ 697,982</b>

ESE Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student	
Additional Funding from the ESE Guaranteed Allocation.		K-3	251	\$ 978	\$ -
Enter the FTE from 111,112, & 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. The total should equal all FTE from programs 111, 112 & 113 above.		K-3	252	\$ 3,159	\$ -
		K-3	253	\$ 6,446	\$ -
	26.00	4-8	251	\$ 1,097	\$ 28,522
		4-8	252	\$ 3,278	\$ -
		4-8	253	\$ 6,565	\$ -
		9-12	251	\$ 781	\$ -
		9-12	252	\$ 2,961	\$ -
		9-12	253	\$ 6,249	\$ -
<b>Total FTE with ESE Services</b>	<b>26.00</b>			<b>Total from ESE Guarantee</b>	<b>\$ 28,522</b>

3. Supplemental Academic Instruction: District SAI Allocation divided by district FTE (with eligible services)	\$ 21,613,890		82,107.43	Per Student \$ 263	\$ 52,600
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4. Summer Reading Programs : Non-recurring funds Allocation divided by district FTE (with eligible services)	\$ 808,687		82,107.43	Per Student \$ 10	\$ 2,000
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**Total Base Funding, ESE Guarantee, SAI, and Summer Reading Program \$ 781,104**

5. Class size Reduction Funds:					
	<u>Weighted FTE aggregated from input in Section 1</u>		<u>DCD</u>	<u>Allocation factors</u>	
PreK - 3	0.0000	X	0.9614	X	180.65 = 0
4-8	200.0000	X	0.9614	X	163.79 = 31,494
9-12	0.0000	X	0.9614	X	160.74 = 0
<b>Total</b>	<b>200.0000</b>				<b>Total Class Size Reduction Funds \$ 31,494</b>

(\*Total FTE should equal total in Section 1, column (d).)

<b>6A. Divide school's Weighted FTE (WFTE) total computed</b>			
in (d) above:	<u>200.000</u>	by district's WFTE:	<u>88,180.28</u>
to obtain school's WFTE share.			0.2268%
<b>6B. Divide school's Unweighted FTE (UFTE) total computed</b>			
in (b) above:	<u>200.000</u>	by district's UFTE:	<u>82,107.43</u>
to obtain school's UFTE share.			0.2436%
<b>6C. Divide school's High School Unweighted FTE (UFTE) total computed</b>			
in (b) above:	<u>0.000</u>	by district's UFTE:	<u>82,107.43</u>
to obtain school's UFTE share.			0.0000%
Refer to Note:			
<b>7. Other FEFP (WFTE share)</b>		(a)	
Applicable to all Charter Schools:			<u>\$ 2,218,648</u> x 0.2268% = <u>\$ 5,032</u>
Declining Enrollment	\$ <u>0</u>		
Sparsity Supplement	\$ <u>0</u>		
Hold Harmless	\$ <u>0</u>		
Program Related Requirements:			
Safe Schools	\$ <u>2,218,648</u>		
<b>8. Discretionary Millage (WFTE share)</b>		(d)	<u>13,241,726</u> x 0.2268% = <u>\$ 30,032</u>
<b>9. Discretionary Tax Equalization Allocation (UFTE share)</b>		(b)	<u>0</u> x 0.2436% = <u>\$ -</u>
<b>10. Discretionary Lottery (WFTE share)</b>		(a)	<u>3,732,164</u> x 0.2268% = <u>\$ 8,465</u>
<b>11. Instructional Materials Allocation (UFTE share)</b>		(b)	<u>7,085,526</u> x 0.2436% = <u>\$ 17,260</u>
Science Laboratory Materials (high school only)		(c)	<u>129,967</u> x 0.0000% = <u>\$ -</u>
<b>12. Public School Technology (UFTE share)</b>		(b)	<u>1,613,907</u> x 0.2436% = <u>\$ 3,931</u>
<b>13. Teacher Training (UFTE share)</b>		(b)	<u>1,163,707</u> x 0.2436% = <u>\$ 2,835</u>
<b>14. Student Transportation</b>		(e)	
<b>15. Florida Teachers Lead Program Stipend</b>		(f)	
<b>16. Food Service Allocation</b>		(g)	
<b>17. Revenue available from other sources.</b>			

<b>18. 1998-99 Hold Harmless Calculation (Only if this charter school was in operation prior to July 1, 1999)</b>			
Base Student Allocation:	\$3,223.06	District Cost Differential:	0.9678
	Program		Base
	UFTE*	Cost Factor	WFTE
1998-1999	x	1.399 =	0.000
2003-2004	@	Base funding + SAI (\$263 per UFTE)	
			Change
			\$ -
			\$ -
			\$ -

*If your school is eligible and only if the change is a positive number, enter change amount manually in the right hand column.*

NOTES:

(a) District allocations multiplied by percentage from item 6A.	Total	<u>\$ 880,153</u>
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- (b) District allocations multiplied by percentage from item 6B.
- (c) District allocations multiplied by percentage from item 6C.
- (d) Proceeds of millage levy multiplied by percentage from item 6A.
- (e) Consistent with Chapter 1006.21, Florida Statutes and DOE Student Transportation General Instructions
- (f) Teacher Lead Program Allocation per 1012.71, Florida Statutes
- (g) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

*Administrative fees charged by the school district shall be calculated based upon 5 percent of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 501 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in 1013.62(2) F.S. To calculate the administrative fee to be withheld for schools with more than 500 students, divide the school population into 500. Multiply that fraction times the funds available, then times 5%.*

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*

## Revenue Estimate Worksheet for Sample Conversion Charter School

Based on the Second Calculation of the FEFP 2003-04

School District: **Polk** Berkley Middle School 2006-07

1. 2003-2004 FEFP State and Local, Funding  
 Base Student Allocation \$3,630.03 District Cost Differential: 0.9614

Program	Number of FTE	Program Cost Factor	Weighted FTE (b) x (c)	2003-04 Base Funding WFTE x BSA x DCD
(a)	(b)	(c)	(d)	(e)
101 Basic K-3		1.002	0.0000	\$ -
111 Basic K-3 with ESE Services		1.002	0.0000	\$ -
102 Basic 4-8	261.00	1.000	261.0000	\$ 910,867
112 Basic 4-8 with ESE Services	39.00	1.000	39.0000	\$ 136,107
103 Basic 9-12		1.140	0.0000	\$ -
113 Basic 9-12 with ESE Services		1.140	0.0000	\$ -
254 ESE Level 4 (Grade Level PreK-3)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 4-8)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 9-12)		3.948	0.0000	\$ -
255 ESE Level 5 (Grade Level PreK-3)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 4-8)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 9-12)		5.591	0.0000	\$ -
130 ESOL (Grade Level PreK-3)		1.298	0.0000	\$ -
ESOL (Grade Level 4-8)		1.298	0.0000	\$ -
ESOL (Grade Level 9-12)		1.298	0.0000	\$ -
300 Vocational (Grades 9-12)		1.190	0.0000	\$ -
<b>Totals</b>	<b>300.00</b>		<b>300.0000</b>	<b>\$ 1,046,974</b>

2. ESE Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student	
Additional Funding from the ESE Guaranteed Allocation.		K-3	251	\$ 978	\$ -
Enter the FTE from 111, 112, & 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. The total should equal all FTE from programs 111, 112 & 113 above.		K-3	252	\$ 3,159	\$ -
		K-3	253	\$ 6,446	\$ -
	39.00	4-8	251	\$ 1,097	\$ 42,783
		4-8	252	\$ 3,278	\$ -
		4-8	253	\$ 6,565	\$ -
		9-12	251	\$ 781	\$ -
		9-12	252	\$ 2,961	\$ -
		9-12	253	\$ 6,249	\$ -
<b>Total FTE with ESE Services</b>	<b>39.00</b>			<b>Total from ESE Guarantee</b>	<b>\$ 42,783</b>

3. Supplemental Academic Instruction:				
District SAI Allocation divided by district FTE (with eligible services)	\$ 21,613,890		82,107.43	Per Student \$ 263 \$ 78,900

4. Summer Reading Programs :				
Non-recurring funds Allocation divided by district FTE (with eligible services)	\$ 808,687		82,107.43	Per Student \$ 10 \$ 3,000

**Total Base Funding, ESE Guarantee, SAI, and Summer Reading Program \$ 1,171,657**

5. Class size Reduction Funds:	Weighted FTE aggregated from input in Section 1	DCD	Allocation factors	
PreK - 3	0.0000	X 0.9614	X 180.65	= 0
4-8	300.0000	X 0.9614	X 163.79	= 47,240
9-12	0.0000	X 0.9614	X 160.74	= 0
<b>Total</b>	<b>300.0000</b>			<b>Total Class Size Reduction Funds \$ 47,240</b>

(\*Total FTE should equal total in Section 1, column (d).)

- 6A. Divide school's Weighted FTE (WFTE) total computed  
 in (d) above: 300.000 by district's WFTE: 88,180.28  
 to obtain school's WFTE share. 0.3402%
- 6B. Divide school's Unweighted FTE (UFTE) total computed  
 in (b) above: 300.000 by district's UFTE: 82,107.43  
 to obtain school's UFTE share. 0.3654%
- 6C. Divide school's High School Unweighted FTE (UFTE) total computed  
 in (b) above: 0.000 by district's UFTE: 82,107.43  
 to obtain school's UFTE share. 0.0000%

Refer to Note:

7. Other FEFP (WFTE share)	(a)				
Applicable to all Charter Schools:		\$ 2,218,648	x	0.3402%	\$ 7,548
Declining Enrollment		\$ 0			
Sparsity Supplement		\$ 0			
Hold Harmless		\$ 0			
Program Related Requirements:					
Safe Schools		\$ 2,218,648			
8. Discretionary Millage (WFTE share)	(d)	13,241,726	x	0.3402%	\$ 45,048
9. Discretionary Tax Equalization Allocation (UFTE share)	(b)	0	x	0.3654%	\$ -
10. Discretionary Lottery (WFTE share)	(a)	3,732,164	x	0.3402%	\$ 12,697
11. Instructional Materials Allocation (UFTE share)	(b)	7,085,526	x	0.3654%	\$ 25,891
Science Laboratory Materials (high school only)	(c)	129,967	x	0.0000%	\$ -
12. Public School Technology (UFTE share)	(b)	1,613,907	x	0.3654%	\$ 5,897
13. Teacher Training (UFTE share)	(b)	1,163,707	x	0.3654%	\$ 4,252
14. Student Transportation	(e)				
15. Florida Teachers Lead Program Stipend	(f)				
16. Food Service Allocation	(g)				
17. Revenue available from other sources.					

18. 1998-99 Hold Harmless Calculation <i>(Only if this charter school was in operation prior to July 1, 1999)</i>					
Base Student Allocation:	\$3,223.06		District Cost Differential:	0.9678	
	Program			Base	
	UFTE*	Cost Factor	WFTE	Funding	
1998-1999	x	1.399	= 0.000	x BSA & DCD	= \$ -
2003-2004	@	Base funding + SAI (\$263 per UFTE)		=	\$ -
				Change	\$ -
<small>*Enter only FTE of students meeting criteria for Dropout Prevention Program</small>					
<small>If your school is eligible and only if the change is a positive number, enter change amount manually in the right hand column.</small>					

NOTES:

- (a) District allocations multiplied by percentage from item 6A. Total \$ 1,320,230
- (b) District allocations multiplied by percentage from item 6B.
- (c) District allocations multiplied by percentage from item 6C.
- (d) Proceeds of millage levy multiplied by percentage from item 6A.
- (e) Consistent with Chapter 1006.21, Florida Statutes and DOE Student Transportation General Instructions
- (f) Teacher Lead Program Allocation per 1012.71, Florida Statutes
- (g) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

*Administrative fees charged by the school district shall be calculated based upon 5 percent of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 501 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in 1013.62(2) F.S. To calculate the administrative fee to be withheld for schools with more than 500 students, divide the school population into 500. Multiply that fraction times the funds available, then times 5%.*

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*



## Revenue Estimate Worksheet for Sample Conversion Charter School

Based on the Second Calculation of the FEFP 2003-04

School District: **Polk** Berkley Middle School 2007-08

1. 2003-2004 FEFP State and Local, Funding  
 Base Student Allocation \$3,630.03

District Cost Differential: 0.9614

Program	Number of FTE	Program Cost Factor (c)	Weighted FTE (b) x (c) (d)	2003-04 Base Funding WFTE x BSA x DCD (e)
(a)	(b)	(c)	(d)	(e)
101 Basic K-3		1.002	0.0000	\$ -
111 Basic K-3 with ESE Services		1.002	0.0000	\$ -
102 Basic 4-8	348.00	1.000	348.0000	\$ 1,214,489
112 Basic 4-8 with ESE Services	52.00	1.000	52.0000	\$ 181,475
103 Basic 9-12		1.140	0.0000	\$ -
113 Basic 9-12 with ESE Services		1.140	0.0000	\$ -
254 ESE Level 4 (Grade Level PreK-3)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 4-8)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 9-12)		3.948	0.0000	\$ -
255 ESE Level 5 (Grade Level PreK-3)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 4-8)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 9-12)		5.591	0.0000	\$ -
130 ESOL (Grade Level PreK-3)		1.298	0.0000	\$ -
ESOL (Grade Level 4-8)		1.298	0.0000	\$ -
ESOL (Grade Level 9-12)		1.298	0.0000	\$ -
300 Vocational (Grades 9-12)		1.190	0.0000	\$ -
<b>Totals</b>	<b>400.00</b>		<b>400.0000</b>	<b>\$ 1,395,964</b>

2. ESE Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student	
Additional Funding from the ESE Guaranteed Allocation.		K-3	251	\$ 978	\$ -
Enter the FTE from 111,112, & 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. The total should equal all FTE from programs 111, 112 & 113 above.		K-3	252	\$ 3,159	\$ -
		K-3	253	\$ 6,446	\$ -
	52.00	4-8	251	\$ 1,097	\$ 57,044
		4-8	252	\$ 3,278	\$ -
		4-8	253	\$ 6,565	\$ -
		9-12	251	\$ 781	\$ -
		9-12	252	\$ 2,961	\$ -
		9-12	253	\$ 6,249	\$ -
<b>Total FTE with ESE Services</b>	<b>52.00</b>			<b>Total from ESE Guarantee</b>	<b>\$ 57,044</b>

3. Supplemental Academic Instruction:					
District SAI Allocation	\$ 21,613,890			Per Student	
divided by district FTE (with eligible services)			82,107.43	\$ 263	\$ 105,200

4. Summer Reading Programs :					
Non-recurring funds	\$ 808,687		82,107.43	Per Student	
Allocation divided by district FTE (with eligible services)				\$ 10	\$ 4,000

**Total Base Funding, ESE Guarantee, SAI, and Summer Reading Program \$ 1,562,208**

5. Class size Reduction Funds:	Weighted FTE aggregated from input in Section 1	DCD	Allocation factors	
PreK - 3	0.0000	X 0.9614	X 180.65	= 0
4-8	400.0000	X 0.9614	X 163.79	= 62,987
9-12	0.0000	X 0.9614	X 160.74	= 0
<b>Total</b>	<b>400.0000</b>			<b>Total Class Size Reduction Funds \$ 62,987</b>

(\*Total FTE should equal total in Section 1, column (d).)

- 6A. Divide school's Weighted FTE (WFTE) total computed  
 in (d) above: 400.000 by district's WFTE: 88,180.28  
 to obtain school's WFTE share. 0.4536%
- 6B. Divide school's Unweighted FTE (UFTE) total computed  
 in (b) above: 400.000 by district's UFTE: 82,107.43  
 to obtain school's UFTE share. 0.4872%
- 6C. Divide school's High School Unweighted FTE (UFTE) total computed  
 in (b) above: 0.000 by district's UFTE: 82,107.43 0.0000%

Refer to Note:

7. Other FEFP (WFTE share)	(a)				
Applicable to all Charter Schools:		\$ 2,218,648	x	0.4536%	\$ 10,064
Declining Enrollment		\$ 0			
Sparsity Supplement		\$ 0			
Hold Harmless		\$ 0			
Program Related Requirements:					
Safe Schools		\$ 2,218,648			
8. Discretionary Millage (WFTE share)	(d)	13,241,726	x	0.4536%	\$ 60,064
9. Discretionary Tax Equalization Allocation (UFTE share)	(b)	0	x	0.4872%	\$ -
10. Discretionary Lottery (WFTE share)	(a)	3,732,164	x	0.4536%	\$ 16,929
11. Instructional Materials Allocation (UFTE share)	(b)	7,085,526	x	0.4872%	\$ 34,521
Science Laboratory Materials (high school only)	(c)	129,967	x	0.0000%	\$ -
12. Public School Technology (UFTE share)	(b)	1,613,907	x	0.4872%	\$ 7,863
13. Teacher Training (UFTE share)	(b)	1,163,707	x	0.4872%	\$ 5,670
14. Student Transportation	(e)				
15. Florida Teachers Lead Program Stipend	(f)				
16. Food Service Allocation	(g)				
17. Revenue available from other sources.					

18. 1998-99 Hold Harmless Calculation (Only if this charter school was in operation prior to July 1, 1999)					
Base Student Allocation:	\$3,223.06	District Cost Differential:	0.9678		
				Base	
	UFTE*	Program Cost Factor	WFTE	Funding	
1998-1999	x	1.399	= 0.000	x BSA & DCD	= \$ -
2003-2004	@	Base funding + SAI (\$263 per UFTE)			= \$ -
*Enter only FTE of students meeting criteria for Dropout Prevention Program				Change	\$ -
If your school is eligible and only if the change is a positive number, enter change amount manually in the right hand column.					

NOTES:

- (a) District allocations multiplied by percentage from item 6A. Total \$ 1,760,306
- (b) District allocations multiplied by percentage from item 6B.
- (c) District allocations multiplied by percentage from item 6C.
- (d) Proceeds of millage levy multiplied by percentage from item 6A.
- (e) Consistent with Chapter 1006.21, Florida Statutes and DOE Student Transportation General Instructions
- (f) Teacher Lead Program Allocation per 1012.71, Florida Statutes
- (g) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program.

Administrative fees charged by the school district shall be calculated based upon 5 percent of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 501 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in 1013.62(2) F.S. To calculate the administrative fee to be withheld for schools with more than 500 students, divide the school population into 500. Multiply that fraction times the funds available, then times 5%.

FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.

Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.

## Revenue Estimate Worksheet for Sample Conversion Charter School

Based on the Second Calculation of the FEFP 2003-04

School District: **Polk** Berkley Middle School 2008-09

1. **2003-2004 FEFP State and Local, Funding**

Base Student Allocation \$3,630.03

District Cost Differential: 0.9614

Program	Number of FTE	Program Cost Factor	Weighted FTE (b) x (c)	2003-04 Base Funding WFTE x BSA x DCD (e)
(a)	(b)	(c)	(d)	(e)
101 Basic K-3		1.002	0.0000	\$ -
111 Basic K-3 with ESE Services		1.002	0.0000	\$ -
102 Basic 4-8	435.00	1.000	435.0000	\$ 1,518,111
112 Basic 4-8 with ESE Services	65.00	1.000	65.0000	\$ 226,844
103 Basic 9-12		1.140	0.0000	\$ -
113 Basic 9-12 with ESE Services		1.140	0.0000	\$ -
254 ESE Level 4 (Grade Level PreK-3)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 4-8)		3.948	0.0000	\$ -
ESE Level 4 (Grade Level 9-12)		3.948	0.0000	\$ -
255 ESE Level 5 (Grade Level PreK-3)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 4-8)		5.591	0.0000	\$ -
ESE Level 5 (Grade Level 9-12)		5.591	0.0000	\$ -
130 ESOL (Grade Level PreK-3)		1.298	0.0000	\$ -
ESOL (Grade Level 4-8)		1.298	0.0000	\$ -
ESOL (Grade Level 9-12)		1.298	0.0000	\$ -
300 Vocational (Grades 9-12)		1.190	0.0000	\$ -
<b>Totals</b>	<b>500.00</b>		<b>500.0000</b>	<b>\$ 1,744,955</b>

2. ESE Guaranteed Allocation:	FTE	Grade Level	Matrix Level	Guarantee Per Student	
Additional Funding from the ESE Guaranteed Allocation.		K-3	251	\$ 978	\$ -
Enter the FTE from 111,112, & 113 by grade and matrix level. Students who do not have a matrix level should be considered 251. The total should equal all FTE from programs 111, 112 & 113 above.	65.00	K-3	252	\$ 3,159	\$ -
		K-3	253	\$ 6,446	\$ -
		4-8	251	\$ 1,097	\$ 71,305
		4-8	252	\$ 3,278	\$ -
		4-8	253	\$ 6,565	\$ -
		9-12	251	\$ 781	\$ -
		9-12	252	\$ 2,961	\$ -
		9-12	253	\$ 6,249	\$ -
<b>Total FTE with ESE Services</b>	<b>65.00</b>			<b>Total from ESE Guarantee</b>	<b>\$ 71,305</b>

3. <b>Supplemental Academic Instruction:</b>					
District SAI Allocation divided by district FTE (with eligible services)	\$ 21,613,890			Per Student	
			82,107.43	\$ 263	\$ 131,500

4. <b>Summer Reading Programs :</b>					
Non-recurring funds Allocation divided by district FTE (with eligible services)	\$ 808,687			Per Student	
			82,107.43	\$ 10	\$ 5,000

**Total Base Funding, ESE Guarantee, SAI, and Summer Reading Program \$ 1,952,760**

5. <b>Class size Reduction Funds:</b>					
	<i>Weighted FTE aggregated from input in Section 1</i>	<i>DCD</i>	<i>Allocation factors</i>		
PreK - 3	0.0000	X 0.9614	180.65	=	0
4-8	500.0000	X 0.9614	163.79	=	78,734
9-12	0.0000	X 0.9614	160.74	=	0
<b>Total</b>	<b>500.0000</b>				<b>Total Class Size Reduction Funds \$ 78,734</b>

(\*Total FTE should equal total in Section 1, column (d).)

6A. Divide school's Weighted FTE (WFTE) total computed					
in (d) above:	<u>500.000</u>	by district's WFTE:	<u>88,180.28</u>		
to obtain school's WFTE share.					0.5670%
6B. Divide school's Unweighted FTE (UFTE) total computed					
in (b) above:	<u>500.000</u>	by district's UFTE:	<u>82,107.43</u>		
to obtain school's UFTE share.					0.6090%
6C. Divide school's High School Unweighted FTE (UFTE) total computed					
in (b) above:	<u>0.000</u>	by district's UFTE:	<u>82,107.43</u>		
to obtain school's UFTE share.					0.0000%
		Refer to Note:			
7. Other FEFP (WFTE share)		(a)			
Applicable to all Charter Schools:			<u>\$ 2,218,648</u>	x	0.5670%
Declining Enrollment	\$ <u>0</u>				
Sparsity Supplement	\$ <u>0</u>				
Hold Harmless	\$ <u>0</u>				
Program Related Requirements:					
Safe Schools	\$ <u>2,218,648</u>				
8. Discretionary Millage (WFTE share)		(d)	<u>13,241,726</u>	x	0.5670%
9. Discretionary Tax Equalization Allocation (UFTE share)		(b)	<u>0</u>	x	0.6090%
10. Discretionary Lottery (WFTE share)		(a)	<u>3,732,164</u>	x	0.5670%
11. Instructional Materials Allocation (UFTE share)		(b)	<u>7,085,526</u>	x	0.6090%
Science Laboratory Materials (high school only)		(c)	<u>129,967</u>	x	0.0000%
12. Public School Technology (UFTE share)		(b)	<u>1,613,907</u>	x	0.6090%
13. Teacher Training (UFTE share)		(b)	<u>1,163,707</u>	x	0.6090%
14. Student Transportation		(e)			
15. Florida Teachers Lead Program Stipend		(f)			
16. Food Service Allocation		(g)			
17. Revenue available from other sources.					
18. 1998-99 Hold Harmless Calculation	<i>(Only if this charter school was in operation prior to July 1, 1999)</i>				
Base Student Allocation:	\$3,223.06	District Cost Differential:	0.9678		
	UFTE*	Program Cost Factor	WFTE		Base Funding
1998-1999	x	1.399 =	0.000	x	BSA & DCD = \$ -
2003-2004	@				Base funding + SAI (\$263 per UFTE) = \$ -
*Enter only FTE of students meeting criteria for Dropout Prevention Program					Change \$ -
<i>If your school is eligible and only if the change is a positive number, enter change amount manually in the right hand column.</i>					

NOTES:

- |   |       |                     |
|---|-------|---------------------|
| (a) District allocations multiplied by percentage from item 6A.   | Total | <u>\$ 2,200,383</u> |
| (b) District allocations multiplied by percentage from item 6B.   |       |                     |
| (c) District allocations multiplied by percentage from item 6C.   |       |                     |
| (d) Proceeds of millage levy multiplied by percentage from item 6A.   |       |                     |
| (e) Consistent with Chapter 1006.21, Florida Statutes and DOE Student Transportation General Instructions           |       |                     |
| (f) Teacher Lead Program Allocation per 1012.71, Florida Statutes   |       |                     |
| (g) Funding based on student eligibility and meals provided, if participating in the National School Lunch Program. |       |                     |

*Administrative fees charged by the school district shall be calculated based upon 5 percent of available funds from the FEFP and categorical funding for which charter students may be eligible. For charter schools with a population of 501 or more students the difference in the fee calculation and the fee withheld may only be used for capital outlay purposes specified in 1013.62(2) F.S. To calculate the administrative fee to be withheld for schools with more than 500 students, divide the school population into 500. Multiply that fraction times the funds available, then times 5%.*

*FEFP and categorical funding are recalculated during the year to reflect the revised number of full-time equivalent students reported during the survey periods designated by the Commissioner of Education.*

*Revenues flow to districts from state sources and from county tax collectors on various distribution schedules.*

**BERKLEY MIDDLE CHARTER SCHOOL  
STAFFING**

8/21/2003

	2003-04		2004-05		2005-06		2006-07		2007-08		2008-09	
	AMOUNT	#	AMOUNT	#	AMOUNT	#	AMOUNT	#	AMOUNT	#	AMOUNT	#
TEACHERS-BASIC		5	162,500	10	325,000	15	487,500	17	552,500	22	715,000	
TEACHERS-DEAN												
COUNSELOR		0.25	11,000	0.25	11,000	1	44,000	1	44,000	1	44,000	
ASST. TEACHERS												
PRINCIPAL		1	65,000	1	65,000	1	65,000	1	65,000	1	65,000	
ASST. PRINCIPAL												
SECRETARIES		1	20,000	1	20,000	2	40,000	2	40,000	2	40,000	
<b>TOTAL SALARIES</b>		<b>7.25</b>	<b>258,500</b>	<b>12.3</b>	<b>421,000</b>	<b>20</b>	<b>648,500</b>	<b>24</b>	<b>773,500</b>	<b>31</b>	<b>984,000</b>	
RETIREMENT (7.39%)			19,103		31,112		47,924		57,162		72,718	
SOC SEC (7.65%)			19,775		32,207		49,610		59,173		75,276	
MED INS (\$4,800)			34,800		58,800		96,000		115,200		148,800	
WKRS COMP (1%)			2,585		4,210		6,485		7,735		9,840	
<b>TOTAL BENEFITS</b>			<b>76,263</b>		<b>126,328</b>		<b>200,019</b>		<b>239,269</b>		<b>306,634</b>	
<b>TOTAL</b>			<b>334,763</b>		<b>547,328</b>		<b>848,519</b>		<b>1,012,769</b>		<b>1,290,634</b>	
ENROLLMENT	N/A	100		200		300		400		500		

**BERKLEY MIDDLE CHARTER SCHOOL  
OPERATING BUDGET**

8/27/2003

<b>PROJECTED ENROLLMENT</b>	<b>100</b>	<b>200</b>	<b>300</b>
<b>REVENUE</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>
	<b>2004-05</b>	<b>2005-06</b>	<b>2006-07</b>
FTE FUNDING	440,076	880,153	1,320,230
TRANSPORTATION	31,500	63,000	94,500
FOOD SERVICE			
FUND RAISERS	30,000	30,000	30,000
CAPITAL OUTLAY	52,800	105,600	158,400
FEDERAL GRANTS	150,000	150,000	
<b>TOTAL REVENUE</b>	<b>704,376</b>	<b>1,228,753</b>	<b>1,603,130</b>

**OPERATING EXPENSES**

<b>ACCOUNT NAME</b>	<b>ACCT NO.</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>
		<b>2004-05</b>	<b>2005-06</b>	<b>2006-07</b>
Salaries-Teachers	15000120	162,500	325,000	487,500
Salaries-Asst. Teachers	15000160			12,000
Retirement-Instruction	15000210	12,009	24,018	36,913
Soc Sec/Medicare-Instructional	15000220	12,431	24,863	38,212
Medical Insurance-Instructional	15000230	25,200	49,200	76,800
Workers Comp.-Instructional	15000240	1,625	3,250	4,995
Contracted Services-Instructional	15000310	3,000	3,000	5,000
Travel-Instructional	15000330	500	1,000	2,000
Supplies-Instructional	15000510	14,000	28,000	33,000
Textbooks-Instructional	15000520	5,000	10,000	15,000
Equipment-Instructional	15000640	2,500	2,500	5,000
Equipment-Instructional Technology	15000640	9,000	18,000	18,000
Software-Instructional	15000690	1,500	2,000	2,500
Salaries-Sub Teachers	15000750	2,000	4,000	6,000
Salaries-Counselor/Dean	16100130	11,000	11,000	44,000
Retirement-Student Support	16100210	813	813	3,252
Social Security-Student Support	16100220	842	842	3,366
Medical Insurance-Student Support	16100230	1,200	1,200	4,800
Workers Comp-Student Support	16100240	110	110	440
Supplies-Student Support	16100510	200	300	400
Curr Development	16300310	1,500	3,000	5,000
Staff Training	16400310	1,500	3,000	4,500
Contracted Services-Admin/Gov	17100310	2,000	2,000	2,000
Contracted Services-Legal	17100310	1,000	1,000	1,000
Liability Insurance-Charter Board	17100320	2,500	2,500	2,500
Travel-Charter Board	17100330	500	500	500
Unemployment Tax	17200250	1,370	2,325	4,158
Insurance-Liability	17200320	2,500	2,500	2,500
Salaries-Admn	17300110	65,000	65,000	65,000
Salaries-Secretaries	17300160	20,000	20,000	40,000
Retirement-Admin	17300210	6,282	6,282	7,760
Soc. Sec./Medicare-Admin	17300220	6,503	6,503	8,033
Medical Insurance-Admin	17300230	9,600	9,600	14,400
Workers Comp-Admin	17300240	850	850	1,050
Travel-Admin	17300330	500	500	1,000
Equipment Rental - Admin	17300360	1,500	2,000	2,500
Postage	17300370	500	600	700
Advertising/Recruiting	17300390	1,000	1,000	1,000
Supplies-Admin	17300510	2,000	3,000	4,000

**OPERATING EXPENSES**

8/27/2003

<u>ACCOUNT NAME</u>	<u>ACCT NO.</u>	<u>BUDGET</u> <u>2004-05</u>	<u>BUDGET</u> <u>2005-06</u>	<u>BUDGET</u> <u>2006-07</u>
Equipment-Admin.	17300640	10,000	10,000	10,000
Software-Admin	17300690	2,500	2,500	2,500
Facilities Acquisition	TBA	65,000	90,000	105,000
Facilities-Original Equipment	17400640	12,000	12,000	12,000
Contr. Services-Fiscal/Payroll/Audit	17500310	20,542	33,084	45,627
District Admn (5%)	17500790	22,004	44,008	66,012
Contracted Services-Food	17600390			
Contracted Services-Asses/Eval	17700310	1,500	1,500	1,500
Contracted Services - Transp.	17800390	31,500	63,000	94,500
Salaries-Custodians	17900100			
Retirement-Custodians	17900210			
Soc. Sec.-Custodians	17900220			
Insurance-Custodians	17900230			
Workers Comp-Custodians	17900240			
Insurance-Operations	17900320	15,000	15,000	15,000
Telephone	17900370	3,600	3,600	3,600
Contracted Services - Operations	17900390	20,000	30,000	40,000
Utilities	17900400	18,000	24,000	30,000
Supplies-Operations	17900510	3,000	4,000	5,000
Contracted Services-Maintenance	18100350	3,000	5,000	7,000
<b>TOTAL EXPENSES</b>		<b>619,681</b>	<b>978,948</b>	<b>1,404,518</b>
<b>RESERVES</b>		<b>84,695</b>	<b>249,805</b>	<b>198,612</b>
<b>Net Income as % of Revenue</b>		<b>12.02%</b>	<b>20.33%</b>	<b>12.39%</b>

**BERKLEY MIDDLE CHARTER SCHOOL  
OPERATING BUDGET**

8/27/2003

**PROJECTED ENROLLMENT** 400 500

<u>REVENUE</u>	<u>BUDGET</u>	<u>BUDGET</u>
	<u>2007-08</u>	<u>2008-09</u>
FTE FUNDING	1,760,306	2,200,383
TRANSPORTATION	126,000	157,500
FOOD SERVICE		
FUND RAISERS	30,000	
CAPITAL OUTLAY	211,200	264,000
FEDERAL GRANTS		
<b>TOTAL REVENUE</b>	<b>2,127,506</b>	<b>2,621,883</b>

**OPERATING EXPENSES**

<u>ACCOUNT NAME</u>	<u>ACCT NO.</u>	<u>BUDGET</u>	<u>BUDGET</u>
		<u>2007-08</u>	<u>2008-09</u>
Salaries-Teachers	15000120	552,500	715,000
Salaries-Asst. Teachers	15000160	24,000	36,000
Retirement-Instruction	15000210	42,603	55,498
Soc Sec/Medicare-Instructional	15000220	44,102	57,452
Medical Insurance-Instructional	15000230	91,200	120,000
Workers Comp.-Instructional	15000240	5,865	7,510
Contracted Services-Instructional	15000310	5,000	5,000
Travel-Instructional	15000330	3,000	4,000
Supplies-Instructional	15000510	33,000	33,000
Textbooks-Instructional	15000520	10,000	10,000
Equipment-Instructional	15000640	10,000	10,000
Equipment-Instructional Technology	15000640	18,000	18,000
Software-Instructional	15000690	3,000	3,000
Salaries-Sub Teachers	15000750	6,800	8,800
Salaries-Counselor/Dean	16100130	44,000	80,000
Retirement-Student Support	16100210	3,252	5,912
Social Security-Student Support	16100220	3,366	6,120
Medical Insurance-Student Support	16100230	4,800	9,600
Workers Comp-Student Support	16100240	440	800
Supplies-Student Support	16100510	500	600
Curr Development	16300310	8,000	10,000
Staff Training	16400310	6,000	6,000
Contracted Services-Admin/Gov	17100310	2,000	2,000
Contracted Services-Legal	17100310	1,000	1,000
Liability Insurance-Charter Board	17100320	2,500	2,500
Travel-Charter Board	17100330	500	500
Unemployment Tax	17200250	4,725	5,859
Insurance-Liability	17200320	2,500	2,500
Salaries-Admn	17300110	113,000	113,000
Salaries-Secretaries	17300160	40,000	40,000
Retirement-Admin	17300210	11,307	11,307
Soc. Sec./Medicare-Admin	17300220	11,705	11,705
Medical Insurance-Admin	17300230	19,200	19,200
Workers Comp-Admin	17300240	1,530	1,530
Travel-Admin	17300330	1,000	1,000
Equipment Rental - Admin	17300360	3,000	4,000
Postage	17300370	800	900
Advertising/Recruiting	17300390	1,000	1,000
Supplies-Admin	17300510	5,000	5,000



**OPERATING EXPENSES**

8/27/2003

<u>ACCOUNT NAME</u>	<u>ACCT NO.</u>	<u>BUDGET</u>	<u>BUDGET</u>
		<u>2007-08</u>	<u>2008-09</u>
Equipment-Admin.	17300640	5,000	5,000
Software-Admin	17300690	2,500	2,500
Facilities Acquisition	TBA	120,000	120,000
Facilities-Original Equipment	17400640	12,000	12,000
Contr. Services-Fiscal/Payroll/Audit	17500310	58,169	70,711
District Admn (5%)	17500790	88,015	110,019
Contracted Services-Food	17600390		
Contracted Services-Asses/Eval	17700310	1,500	1,500
Contracted Services - Transp.	17800390	126,000	157,500
Salaries-Custodians	17900100		
Retirement-Custodians	17900210		
Soc. Sec.-Custodians	17900220		
Insurance-Custodians	17900230		
Workers Comp-Custodians	17900240		
Insurance-Operations	17900320	15,000	15,000
Telephone	17900370	3,600	3,600
Contracted Services - Operations	17900390	50,000	60,000
Utilities	17900400	36,000	42,000
Supplies-Operations	17900510	6,000	7,000
Contracted Services-Maintenance	18100350	9,000	12,000
<b>TOTAL EXPENSES</b>		<b>1,672,979</b>	<b>2,044,123</b>
<b>RESERVES</b>		<b>454,527</b>	<b>577,760</b>
<b>Net Income as % of Revenue</b>		<b>21.36%</b>	<b>22.04%</b>

BERKLEY MIDDLE CHARTER SCHOOL				8/27/2003
FINANCIAL SUMMARY				
FISCAL YEAR	ENROLLMENT	REVENUE	EXPENDITURES	RESERVES
2004-05	100	704,376	619,681	84,695
2005-06	200	1,228,753	978,948	249,805
2006-07	300	1,603,130	1,404,518	198,612
2007-08	400	2,127,506	1,672,979	454,527
2008-09	500	2,621,883	2,044,123	577,760