

# Treasure Coast Classical Academy Management Transition Plan



**September 19, 2023**



# MANAGEMENT TRANSITION PLAN

## PLAN SUMMARY

### TODAY to DECEMBER 31

- Utilize consultants to the Principal, Administration and Board at the cost up to \$50 per hour.
- The Principal will utilize Florida Consortium of Public Charter School, Charter School Support Unit of Department of Education, and Martin County School District Charter Support.

### JANUARY 1 to JUNE 30

- Hire Ancora Management, LLC (only RFP submitted) to function as our interim management company for specified needs at the rate of 6% of FEFP income sources received during this period. (Estimated amount \$274,000.00 for 6 months)
- The Board the Principal will discuss and work through the options of either building a self-management in house staff or signing a full contract with Ancora Management, LLC.

## PLAN DETAILS

TODAY to DECEMBER 31

TCCA will use consultants to the Principal and Board at the cost of up to \$50.00 an hour.

➤ Help us answer questions like:

- What do we need Optima to hand over to TCCA?
- What does Optima need to give us access to?
- What does Optima need to transfer or convert into TCCA's name?

\*\*\*If Optima agrees to a working relationship this shouldn't need to be utilized, however questions and emails sent by admin and operations go unanswered constantly. This step will help protect the school and help us continue to operate within compliance during the final days with Optima.

- Assist us in proper transition of TCCA financial information from Optima.
- Advise and coach on general areas of the transition from Optima to ensure nothing falls through the cracks.

The Principal will utilize Florida Consortium of Public Charter School, Charter School Support Unit of Department of Education, and Martin County School District Charter Support.

➤ The Florida Consortium of Public Charter Schools

- The FCPCS comes at a cost of \$5158.00.
- The FCOCS provides a state approved teacher evaluation system that reflects Classical Education.
- The FCOCS provides weekly communication with reminders and guidance on compliance with charter school legislation.
- The FCOCS provides notice of grant opportunities.
- The FCOCS aids with media relations to promote your school as well as during a crisis.
- The FCOCS provides valuable resources from their online library, including school ready school forms, manuals, and other school operation documents.

➤ Charter School Support Unit-Connection to the DOE

- CSSU provided to TCCA free of cost to schools in year 1-5.
- Services
  - Boards & Governance
  - Compliance & Grant Admin
  - Consultations
  - Facilities Planning
  - Finance & Budget
  - Planning & Launching
  - School Operations
- Post Types
  - Courses- Will help teachers already enrolled in Optima's PDCP program to complete their certification without having to begin another program.

- Documents
- Presentations
- Resources
- Webinars
  - 888-677-9250
  - Charter. Support live chat
  - [help@charter.support](mailto:help@charter.support)
- Martin County School District Charter Support-Lana Barrows

*\*See Appendix 1 and 2 for scope of management task that need to be addressed during this period*

### **JANUARY 1 to JUNE 30**

Hire Ancora Management, LLC (only RFP submitted) to function as our interim management company for specified needs at the rate of 6% of FEFP income sources received during this period. (Estimated amount \$274,000.00 for 6 months)

- Renew Charter Contract.
- Keep school within compliance, state and federal.
- Keep us informed of grant opportunities.
- Provide FOCUS and enrollment services.
- Provide all financial services. (Exception Payroll)
- Advise on facility expansions. Ex. Portables/covered play area for immediate needs.
  - This does not include gym expansion.
- Advise principal on Cognia Accreditation.
- Assist in Budget Development 24-25 school year.
- Provide Legal services for school personnel when needed. (TCCA will pay separately for these services as we did with Optima)

*\*See Appendix 3 for cost analysis*

The Board the Principal will discuss and work through the options of either building a self-management in house staff or signing a full contract with Ancora Management, LLC.

- A final decision by the board needs to be made no later than April 30.
- If the decision is self-management then a staffing plan will need to be created and recruited with the help of ESI.
- If the decision is to continue using a management company the board will determine if the RFP process is needed.
- If the decision is to continue services with Ancora Management the board attorneys will need to negotiate contract terms and be voted on by the board no later than May 31.

# MANAGEMENT SCOPE OF WORK AND SERVICE

(Appendix 1)



## FINANCIAL SERVICES

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Bookkeeping  
Budget Development  
Annual Audit  
Bill Approval  
Grants  
\*Payroll  
Stakeholder Relations

## BACK-OFFICE

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School Calendar  
Accreditation  
Legal  
Charter Renewal  
End of Year Reporting  
Compliance w/ State, Federal, and District  
ESE Compliance  
FTE Compliance  
Enrollment  
Registrar (Cum-folders, academic records, attendance)  
Lottery Management  
Student Recruitment / Community Marketing  
Communications (Social Media, website, newsletter, all-school family's notifications)  
Course coding (instructional minutes, Focus settings for FTE)

## GOVERNING GROUPS

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Board Development and Training  
Maintain relationship with Martin Co School District  
Maintain relationship with Hillsdale  
Coordinate Board meetings and agenda

## FACILITY

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Custodial Services  
Maintenance Services  
Landscaping  
Purchasing  
Furnishing  
Campus Development / Project Management  
Inspections  
Site facility reviews  
Vendor Contracts

## **OPERATING SYSTEMS**

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Driveline / Car Line  
Zoom  
Google Suite  
IXL Tutoring (academic support systems)  
School Mint (enrollment system)  
School Mint Grow / Wetstone (teacher evaluations)  
Quickbooks  
Focus  
Planbook  
My School Bucks and BlueSnap  
Climate Survey (parents, teachers, students)  
Exit interviews of staff and families

## **IT SERVICES**

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All IT services will be transitioned by September 22,2023.

## **PROGRAMS**

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Before and After School Care  
Clubs  
Lunch Program (NSL)  
Fundraising Events  
PTC  
Clinic

## **HUMAN RESOURCES**

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Teacher Recruitment  
Teacher Certification / Professional Development Reporting  
Job Descriptions  
Employee Benefits  
Pay Structure  
\*Payroll

Appendix 2

| List of management services Optima presented at a previous Board meeting   | Transition Plan - Primary Leader | Transition Team - Support |
|--|----------------------------------|---------------------------|
| <b>Executive Leadership</b>  |                                  | 1/24-6/24                 |
| Represent the school to the district, county, state, and national agencies.  | Ancora Management                | Principal                 |
| Represent the school in legal and financial negotiations.  | Ancora Management                | Director of Ops           |
| Lead the school's bond finance team.   | Ancora Management                | Director of Ops           |
| Lead the school's charter application and renewal processes.   | Ancora Management                | Director of Ops           |
| Liaison with Hillsdale College and other Hillsdale BCSI member schools.  | Principal                        | Academic Admin Team       |
| Lead the expansion efforts including construction, financing, permitting and execution.  | On Pause                         |                           |
| Advocate on the school's behalf regarding changes in law, rule or other impositions of governing bodies.   | Ancora Management                | Director of Ops           |
| Crisis response leader, primary media contact, and PR decision maker.  | Principal                        | Ancora Management         |
| Executive leadership to balance board priorities including academic performance, budget, compliance, quality of services, reputation, and future growth.       | Ancora Management                | Director of Ops           |
|  |                                  |                           |
| <b>Finance, Accounting, and Budget</b>   |                                  |                           |
| Secure maximum funding for the school through district, state and federal sources, including grants, tax referenda, tax exemptions, and other funding sources. | Ancora Management                | Director of Ops           |
| Assist the board with long- and short-term financial planning.   | Ancora Management                | Director of Ops           |
| Monthly, quarterly and annual financial analysis and reporting to assist with management decision making on enrollment, staffing, and capital planning.        | Ancora Management                | Director of Ops           |
| Facilitate a board finance committee (recommended).  | Ancora Management                | Director of Ops           |
| Prepare the annual budget based on the approved enrollment and staffing plans.   | Ancora Management                | Principal                 |
| Monthly GASB   | Ancora Management                | Principal                 |
| Bond agreement deliverables; coordination with DAC and trustee   | Ancora Management                | Director of Ops           |
| Development of annual operating budget; optional budget amendments   | Kirsten Pendleton                | Ancora Management         |
| Financial package - P&L, Balance Sheet, Statement Cash Flow, Budget v Actual (monthly or quarterly)  | Ancora Management                | Director of Ops           |
| Capital expenditures, purchasing curriculum and supplies, RFPs; purchase orders; pricing negotiations  | Ancora Management                | Director of Ops           |
| Bookkeeping - Chart of Accounts, monthly reconciliations, journal entries  | Ancora Management                | Director of Ops           |
| Development of cash flow projections   | Ancora Management                | Director of Ops           |
| Management of receivables and payables   | Ancora Management                | Director of Ops           |

|   |                         |  |
|---|-------------------------|--|
| Grants management - ESSER, CSP, Title grants, etc.  | Ancora Management       | Principal and Admin Team                             |
| Setup of electronic system for petty cash; implementation of no cash policies   | Director of Ops         |  |
| Tracking and distribution of stipend payments and school recognition funds  | ESI                     | Principal  |
| Referendum related local revenue reporting  | Director of Ops         |  |
| Established internal controls to ensure strict compliance with financial best practices, safeguarding the board's assets.                                 | Director of Ops         |  |
| Maintain a detailed list of Florida statutes and rules pertaining to charter schools.   | Ancora Management       | Florida Consortium of Public Charter Schools (FCPCS) |
| Maintain a detailed list of the school's contractual obligations.   | Ancora Management       | Director of Operations                               |
| Maintain task management software to ensure compliance and documentation of compliance with statutes, rules and contractual obligations.                  | Ancora Management       | Director of Operations                               |
| Facilitate required training for faculty and board members.   | Principal               | Director of Ops                                      |
|   |                         |  |
| <b>Compliance</b>   |                         |  |
| Established a compliance framework to ensure alignment of policies and procedures with Florida statutes and Florida Department of Education rules.        | Ancora Management       | Director of Ops w/ FCCS                              |
| Implementation and maintenance of accreditation compliance  | Director of Ops w/ FCCS |  |
| Coordination with school staff on FAST, iReady, academic achievement goals, data interpretation, benchmarking   | Principal               | Upper and Lower School Academic Deans                |
| Coordination with Student Services Director on IEPs, 504s, tracking of accommodations, MTSS, parent complaints  | ESE Admin Director      | Principal  |
| Coordination with directors on meeting dates and times; public notices; distribution of meeting material  | Director of Ops         | Ancora Management                                    |
| Board model agenda, motion log, charter school board approval calendar  | Director of Ops         | Ancora Management                                    |
| Board orientation dashboard, Florida Charter School Governance training and district clearance  | Director of Ops         |  |
| Applications for and selection of all insurance policies, per budget and board approval. Includes educator's package, liability, cyber, property, and D&O | Director of Ops         |  |
| Risk evaluation and mitigation plan   | Director of Ops         | MCS D  |
| Review and any applicable edits of all agreements and contracts with vendors/contractors. Price negotiations.   | Director of Ops         | Ancora Management                                    |
| Lead consultation with the school's attorney on any legal matters.  |                         |  |
| Update board and school leadership with progress, recommendations   | Director of Ops         | Ancora Management                                    |
| Development of online policies and procedures; updates per legislation  | FCPCS and CSSU          | Ancora Management                                    |
| Annual audit, single audit when applicable  | Board Chosen            | Ancora Management                                    |
| Coordination with CPA firm on 990s  | Ancora Management       |  |
| Per charter contract, all deliverables  | Ancora Management       |  |
| Policy updates as statutes change   | Ancora Management       | FCPCS/MCS D/CSSU                                     |



|  |                                    |                     |
|--|------------------------------------|---------------------|
| Public records requests processing   | Director of Ops                    |                     |
| Website updates required by statute  | Director of Ops                    | Project Coordinator |
| Create and maintain required documents pursuant to Florida statutes:                 | Ancora Management                  | Principal           |
| Annually create and submit school academic calendar                                  | Principal                          | Director of Ops     |
| Annually create and submit Crisis Response Plan- Already created just need edits     | Ancora Management                  | Director of Ops     |
| Annually create Salary Calculation Spreadsheet                                       | Director of Ops                    |                     |
| Annually manage Bloodborne Pathogen Exposure Prevention training                     | Director of Ops                    |                     |
| Annually manage Hazard Communication: Right to Understand (GHS) training             | Director of Ops                    |                     |
| Annually manage Student Suicide Prevention training                                  | Director of Ops                    |                     |
| Annually publish enrollment announcement and non-discrimination statement            | Principal                          |                     |
| Annually coordinate out of field letters to parents for October and February surveys | Principal                          |                     |
| Annually submit Annual Accountability Report   | Ancora Management                  |                     |
| Annually submit Annual Program Cost Accounting Report                                | Ancora Management                  |                     |
| Annually submit Capital Outlay Plan  | Board                              | Ancora Management   |
| Annually submit Capital Outlay Report  | Board                              | Ancora Management   |
| Annually submit Code of Student Conduct  | Dean of Lower and Upper School     | Principal           |
| Annually submit Comprehensive Reading Plan   | Dean Of Curriculum and Instruction |                     |
| Annually submit Enrollment Capacity to sponsor by March                              | Principal                          | Director of Ops     |
| Annually submit Final Enrollment Projection submission to sponsor by June            | Ancora Management                  |                     |
| Annually submit Mental Health Assistance Plan  | Mental Health Counselors           | Principal           |
| Annually submit Preliminary Projected Enrollment submission to sponsor by November   | Ancora Management                  |                     |
| Annually submit School Budget  | Ancora Management                  |                     |
| Annually submit School Improvement Plan  | Principal                          | Deans               |
| Annually submit Student Progression Plan   | Principal                          | DEans               |
| Annually submit SunBiz report  | Ancora Management                  |                     |
| Annually submit Teacher Evaluation System Approval                                   | Principal                          |                     |
| Annually update Teacher Evaluation Procedure   | Principal                          |                     |
| Submit changes in governing board to sponsor   | Ancora Management                  | Director of Ops     |
| Prepare and maintain Governing Board Code of Ethics Policy                           | Ancora Management                  | Director of Ops     |
| Prepare and maintain Governing Board Conflict of Interest Policy                     | Ancora Management                  | Director of Ops     |
| Prepare and maintain Governing Board Employee Handbook                               | Ancora Management                  | Director of Ops     |

|   |                     |                          |
|---|---------------------|--------------------------|
| Prepare and maintain Governing Board Policy Handbooks   | Ancora Management   | Director of Ops          |
|   |                     |                          |
| <b>Marketing and Development</b>  |                     |                          |
| Ensure appropriate marketing efforts to establish TCCA as the most desirable school in Martin County.   | Director of Ops     |                          |
| Marketing and brand management quality control and oversight.   | Director of Ops     | Principal                |
| Establishment of brand messaging, including adherence to the Hillsdale classical language in all marketing materials, social media and website. | Director of Ops     | Principal                |
| Creation and maintenance of:  |                     |                          |
| Website   | Director of Ops     | IT                       |
| Banners   | IT Systems Admin    | Project Coordinator      |
| Presentations   | Project Coordinator | Director of Ops          |
| Palm cards  | Project Coordinator | Director of Ops          |
| Flyers  | Project Coordinator | Director of Ops          |
| Advertisements  | Project Coordinator | Director of Ops          |
| Signage   | Director of Ops     | Project Coordinator      |
| Spirit gear   | Director of Ops     | Project Coordinator      |
| Other marketing materials as needed   | Director of Ops     | Project Coordinator      |
|   |                     |                          |
| <b>Operations</b>   |                     |                          |
| Provide ongoing on-site support to the school operations team and school leaders including:   |                     |                          |
| Before and After School Enrichment (BASE) program and systems management  | Director of Ops     | BASE Program Coordinator |
| Extracurriculars - Clubs, outside vendors that provide onsite/offsite after school programs, etc.   | Director of Ops     |                          |
| Athletics program   | Athletic Director   | Director of Ops          |
| Dismissal process and systems management  | Director of Ops     | Operations Team          |
| Lunchroom management oversight  | Director of Ops     | Operations Team          |
| Contract management   | Director of Ops     | Operations Team          |
| Culture/Soft skills training  | Director of Ops     | Operations Team          |
| Operations systems management   | Director of Ops     | Operations Team          |
| Facilities management program   | Facilities Manager  | Director of Ops          |
| PTC marketing support   | PTC                 | Director of Ops          |
| Food service program:   | Director of Ops     | Operations Team          |
| Oversee the FDC verification process  | ESI                 | Director of Ops          |
| Oversee the data collection process   | Principal           | DEan of Academics        |
| Oversee free, reduced-price, and paid meal data and reporting   | Director of Ops     | Ancora Management        |
| Oversee the lunch application process   | Operations Team     |                          |
| Oversee NSLP reviews and audits   | Director of Ops     |                          |
| Conduct NSLP applications renewals  | Director of Ops     |                          |
| Systems Award Management ( <b>SAM</b> ) renewals  | Director of Ops     |                          |
| RFP process management  | Director of Ops     | Ancora Management        |
| Food service management company oversight   | Director of Ops     |                          |

|  |                 |                               |
|--|-----------------|-------------------------------|
| Implement, maintain, and troubleshoot food service system issues   | Director of Ops |                               |
| USDA Fresh Produce Program management  | Director of Ops |                               |
| Health & Wellness program:   | Director of Ops | School nurse                  |
| Clinic management oversight Clinic compliance oversight  | Director of Ops |                               |
| Wellness program oversight   | School Nurse    |                               |
| Safety & Security:   | Principal       | SRO                           |
| Standardize drill procedures   | Director of Ops | MCSD/School Operation Manager |
| Crosstrain   | Principal       |                               |
| Security software and systems procurement and implementation   | IT              |                               |
| Implement School Operations Manager training program.  | Director of Ops | Operations Team               |
| Analyze and improve operations processes.  | Director of Ops | Operations Team               |
| Improve operations quality, productivity, and efficiency.  | Director of Ops | Operations Team               |
| Ensure contractual and regulatory requirements are met and that resources are managed effectively.   | Director of Ops | Operations Team               |
| Establish standard operating procedures and systems in key program and operational areas.  | Director of Ops | Operations Team               |
| Support onsite school operations management teams in the implementation of policies, procedures, and systems.  | Director of Ops | Operations Team               |
| Share Best practices that drive operational excellence at the school.  | Director of Ops | Operations Team               |
| Help implement quality customer-service standards.   | Director of Ops | Operations Team               |
| Conduct semi-annual parent satisfaction surveys.   | Principal       | Director of Operations        |
| Conduct semi-annual faculty & staff satisfaction surveys.  | Principal       | Director of Operations        |
| Conduct annual student satisfaction surveys.   | Principal       | Director of Operations        |
| Streamline and oversee process workflow to accomplish school operations goals.   | Director of Ops | Operations Team               |
| Work closely with the compliance team to ensure that all processes remain compliant with governmental regulations.   | Director of Ops | Operations Team               |
| Perform analysis of our inventory and ensure we are utilizing our inventory effectively, purchasing the right equipment, and maintaining solid inventory data.     | Director of Ops | Operations Team               |
| Set strategic quarterly and annual operations goals.   | Director of Ops | Operations Team               |
| Gather, analyze, and interpret operations data and metrics.  | Director of Ops | Operations Team               |
| Create, update, and manage knowledge bases.  | Director of Ops | Operations Team               |
| Troubleshoot issues that can be resolved at the corporate level to assist the onsite school operations team.   | Director of Ops | Ancora Management             |
| Effectively manage costs to meet budget and practice fiscal responsibility.  | Director of Ops | Ancora Management             |
| Assist with vendor management.   | Director of Ops | Ancora Management             |
| Asset management and inventory management oversight  | Director of Ops | Deans and Operations          |
|  |                 |                               |
| <b>Academics</b>   |                 |                               |
| <i>Academic Compliance</i>   | Principal       |                               |
| Ensure that legislative updates are made annually to board approved school documents (Code of Student Conduct, Mental Health Plan, Student Progression Plan, etc). | Principal       |                               |
| Train new school administrators on Code of Student Conduct, Mental Health Plan, Student Progression Plan and state statutes  | Principal       |                               |
| Ensure that all schools are following their Code of Student Conduct, Mental Health Plan, and Student Progression Plan.   | Principal       |                               |

|  |                     |               |
|--|---------------------|---------------|
| Ensure that school administrators attend required training annually (SESIR, Comprehensive School Threat Assessment Guidelines (CSTAG), etc).   | Principal           |               |
| Responsible for making sure all schools are meeting state standards in all academic areas and addressing state-mandated academic requirements.   | Principal           |               |
| <i>Accreditation</i>   | Principal           | Academic Team |
| Serve as the liaison for Cognia accreditation.   | Principal           | Academic Team |
| Responsible for reviewing feedback from the accreditation committee and disseminating to appropriate departments for improvements to the program and to ensure continued accreditation.  | Principal           | Academic Team |
| Collaborating with Optima and school administrators to prepare for accreditation renewals.   |                     |               |
| Review accreditation documents with school administrators annually.  |                     |               |
| <i>Administrative</i>  | Principal           |               |
| Coordinate lead teachers, coaches and administrators   | Principal           |               |
| Create standard content presentations for school administrators.   |                     |               |
| Create, implement and maintain a program manual for school administrators.   |                     |               |
| Maintain a calendar for assessments, academic administration meetings, etc across the organization.  | Testing Coordinator | Principal     |
| Develop and maintain shared Drive for school administrators for school documents, resources and professional development presentations.  | IT                  |               |
| Maintain the academic portion of SweetProcess to track academic procedures.  | Principal           |               |
| <i>Assessment and Accountability</i>   | Principal           |               |
| Responsible for the organization's assessment program.   | Testing Coordinator | Principal     |
| Prepare and present a general assessment calendar to all school administrators each school year.   |                     |               |
| Assign and oversee an assessment coordinator for the organization.   |                     |               |
| Ensure that each school has an assessments coordinator, and he/she attends all district and Optima assessment training, so they are equipped to plan, organize and execute assessments, as well as train the faculty and inform parents. |                     |               |
| Responsible for disaggregating assessment data (iReady, F.A.S.T., CLT, EOCs, PSAT, SAT, etc) across the organization and making improvements based on the data.  | Principal           |               |
| Conduct quarterly data meetings with assessment coordinators.  | Principal           |               |
| Support school administrators in developing plans to utilize data to inform instruction and set teacher and student goals.   |                     |               |
| Report data summaries to the CEO/Executive Director.   |                     |               |
| Serve as the assessment liaison for any assessments not administered by the districts (CLT, PSAT, etc).  | Principal           |               |
| <i>Curriculum and Instruction</i>  | Principal           |               |
| Responsible for the implementation of the Hillsdale curriculum across all Optima schools.  |                     |               |
| Disseminate information regarding changes in curriculum according to the Hilldale model.   | Principal           |               |
| Oversee the quality and fidelity of the curricula across all schools in the organization.  |                     |               |

|   |           |           |
|---|-----------|-----------|
| Develop and implement a coaching model (based on Get Better Faster) for instructional coaches to use at all schools.  | Principal |           |
| Meet on a quarterly basis with all instructional supervisors for the purpose of maintaining ongoing supervision, coordination and implementation of the Hillsdale K12 program.  |           |           |
| Conduct classroom observations and provide feedback to school administrators.   | Principal |           |
| Coordinate and support school administrators with summer school programs.   | Principal |           |
| Hire and oversee a lead math, literacy, history and science coach each year.  | Principal |           |
| Serve as the liaison for vendors providing academic support resources (IXL, iReady, Whetstone, etc).  | DCIS      |           |
| Oversee planning year for high school using the Optima High School Planning Guide.  |           |           |
| Oversee planning for new positions (college advisor, athletic director, etc).   | Principal |           |
| Submit Hillsdale course descriptions to FLDOE to be added to the course code bank.  | Principal |           |
| <i>Human Resources</i>  | ESI       |           |
| Create and revise job descriptions for academic positions.  | ESI       | Principal |
| Interview new school administrators, work collaboratively with CEO and Hillsdale K12 to recommend candidates for new schools and make hiring recommendations to the CEO/school board.   |           |           |
| Train new teachers on the process of earning a Temporary/Professional Certification.  | ESi       |           |
| Work with school administrators to ensure teachers fulfill requirements for temporary and professional certifications each year.  | Principal | ESI       |
| <i>New School and Program support</i>   |           |           |
| <i>Professional Development</i>   | Principal |           |
| Responsible for planning, organizing, supervising and evaluating a comprehensive staff development program that addresses identified staff needs, supports the Hillsdale model and focuses on student achievement in each of the state standards. | Principal |           |
| Provide organization-wide leadership and guidance for the scheduling and organizing for grade level and departmental meetings in order to ensure horizontal and vertical continuity and articulation of the instructional program.                |           |           |
| Plan and implement professional development when changes in curriculum are made.  | Principal |           |
| Serve as the Director for Optima's PDCP.  |           |           |
| Train the school's PDCP Leader.   |           |           |
| Coordinate schools to share resources for professional development.   |           |           |
| Create and implement a standard Back-to-School professional development plan for all schools.   |           |           |
| Recommend professional development opportunities for school administrators based on performance.  |           |           |
| Maintain Professional Development Plan for each school.   | Principal |           |
| Ensure that schools are tracking professional development hours with their respective districts for recertification.  | Principal |           |
| <i>School Leadership</i>  | Principal |           |

|  |                           |                     |
|--|---------------------------|---------------------|
| Train, mentor and supervise school administrators.   | Hillsdale                 |                     |
| Set annual goals with each school administrator.   |                           |                     |
| Conduct weekly meetings with school administrators.  |                           |                     |
| Conduct weekly mentoring meetings with new school administrators.  |                           |                     |
| Complete quarterly walk-through checklists with school administrators for continued school improvement.  |                           |                     |
| Lead annual leadership conference for school administrators.   |                           |                     |
| Actively support the efforts of school administrators to achieve school and organizational goals (academic excellence indicators) by providing feedback quarterly. |                           |                     |
| Secure consultants, specialists, and other community resources to assist school administrators in attaining objectives.  |                           |                     |
| Evaluate the performance of school administrators.   |                           |                     |
| Establish mentoring relationships among school administrators across the network.  |                           |                     |
| Create and implement a leadership training program to prepare future administrators for the organization.  |                           |                     |
| <i>Student Services</i>  | Student Services Director | Principal           |
| Identify, train and supervise a lead student services director for Optima schools.   |                           |                     |
| Responsible for the oversight, monitoring, compliance and supervision of exceptional student education, gifted and ELL.  | ESE Admin                 |                     |
| Responsible for the oversight, monitoring, compliance and supervision of MTSS and all academic and behavioral intervention.  | ESE Admin                 | MTSS Specialist     |
| Responsible for the oversight, monitoring, compliance and supervision of school counseling.  | Principal                 | Guidance Department |
| Assist Student Services Directors with finding local agencies to provide services outside the scope of what the organization offers.                               | FCSCSS                    | MCSD                |
| Ensure that all required training is implemented at each campus (Youth Mental Health, etc).  | Guidance                  | Principal           |
|  |                           |                     |
| <b>Enrollment</b>  |                           |                     |
| Student Enrollment Planning  | Principal                 |                     |
| Calculate school Capacity to support the submission to the district and updating the school website every 12 weeks.  | Principal                 | Registrar           |
| Plan the number of possible sections and students per section  | Principal                 | Registrar           |
| Calculate the number of initial Open Seats   | Principal                 | Registrar           |
| Student Enrollment Management:   | Principal                 |                     |
| Manage Enrollment System (School Mint) setup   | Principal                 | Registrar           |
| Track Retentions so that they can be factored into open seat calculations.   | Principal                 | Registrar           |
| Track Withdrawals so that they can be factored into open seat calculations.  | Principal                 | Registrar           |
| Track Registration Status  | Principal                 | Registrar           |
| Validate application Priorities before each Lottery  | Principal                 | Registrar           |
| Run Lotteries as required  | Principal                 | Registrar           |
| Track student addition to SIS (Focus or other) in a spreadsheet  | Principal                 | Registrar           |
| Act as a backup for the School Registrar critical functions if a School Registrar leaves the school or is out sick for an extended time.                           | Principal                 | Registrar           |

|  |           |           |
|--|-----------|-----------|
| Support Registrar in managing registration verification.                                       | Principal |           |
| Student Attrition Metric Management  | Principal |           |
| Maintain status report of student attrition.   | Principal | Registrar |
| Student Enrollment Metric Management   | Principal |           |
| Maintain Status Reports from Enrollment System (School Mint) and SIS (Focus)                   | Principal | Registrar |
| Class Scheduling Management  | Principal |           |
| Review, and recommend changes to planned schedule  | Principal |           |
| Class Size Program Management  | Principal |           |
| Review Class Size procedures in mid-August with the Principal/Head of School and school staff. | Principal |           |
| Monitor Class Size issues and notify the School Registrar if corrections are needed.           | Principal |           |
| Send Class Size status reports to Optima executives during the final Survey Week               | Principal |           |
|  | Principal |           |
| This color represents Optima only schools/network  |           |           |
|  |           |           |
|  |           |           |
|  |           |           |
| This color represents responsibilities that are currently covered by TCCA school personnel     |           |           |

### Appendix 3

- School Staff Accountant – Average annual salary \$55k-\$75k – based on Salary.com averages.
  - \$1,925-\$2,625 for 401k contributions
  - \$6,960 for medical, vision, dental, STD, Life
  - Total: \$63,885-\$84,585
- Grant Writer – Average salary \$60,000-\$79,000 – based on Salary.com averages – this is not a position I am finding much of a part-time market for.
  - \$2,100-\$2,765 for 401k contributions
  - \$6,960 for medical, vision, dental, STD, Life
  - Total: \$69,060-\$88,725
- Compliance Manager – Average annual salary \$65,000-\$73,000 per similar Indeed job postings (specifically school related)
  - \$2,275-\$2,555 for 401k contributions
  - \$6,960 for medical, vision, dental, STD, Life
  - Total: \$74,235-\$82,515

**\*\*\*This represents 3 key positions that we will need to immediately hire if we do not choose Ancora. It totals \$195,000.00 for 6 months. We will need other positions that I was unable to research because of the short timeline. My assumption would be that we would still need at least 2 more contracted expert specialists. Ancora's 6 month management fee would be less than that number and they have a proven track record at St. John Classical Academy and have been extremely knowledgeable and willing to jump in and help at a moment's notice. I feel like this is the best plan as we can make this an interim evaluatory decision. In May we can discuss the pros and cons of their leadership/services/working relationship and make a decision if we would rather self manage or continue with their services. If we decide to hire another management company we need the contract to be written according to what is best for the school, not the management company. We also need to have it clearly stated in the contract the termination terms and if needed a 30 or 60 day notice given and TCCA can move on without fear of litigation.**