**Agenda**
Updated 9.12.2024

September 13, 2024
School Board of Manatee County
Workshop - 9:00 AM
Walter Miller School Support Center
Board Room

Times Indicated are Approximate

## I. CALL TO ORDER

## II. AGENDA AMENDMENTS

1. Agenda Amendments - added after publishing

## III. PUBLIC COMMENTS

Public comment is not an open forum to discuss matters unrelated to education, to support or oppose candidates for public office, or to engage in commercial speech attempting to sell a service or product to the School Board or public. Also, public comment is not a forum to attack individual school system employees or Board Members. Any such complaints should be submitted in writing to the Superintendent for appropriate handling. Finally, this is not a forum for addressing issues involving individual students. Because of privacy concerns, such issues should be submitted in writing to the Superintendent for appropriate handling. Each speaker is allowed three minutes to address the Board. Speakers must stand at the podium and not approach the dais.

This is a business meeting of the School Board and the public expects that we conduct it in an orderly, efficient, effective and dignified manner. We request that speakers keep this in mind when making your comments. We also request that the audience keep that in mind and not demonstrate approval or disapproval of what a speaker has said by clapping or booing. The Board appreciates the public's input and will listen attentively, consider each comment, and usually will not respond, enter into debate, or answer questions during comments on agenda items or during the public comments section.

**PUBLIC INPUT INSTRUCTIONS:**
1. Before you begin speaking, please provide any handouts to the Agency Clerk.
2. Please identify yourself only by your full name for the record.
3. You have no more than three minutes to speak. Please stop speaking when the bell rings.
4. Florida Law requires all citizens to conduct themselves in an orderly fashion at public meetings.
5. **WARNING:** Any individual who interferes with the expeditious or orderly process of a School Board meeting, will be subject to removal from the meeting pursuant to Section 1001.372(3) Florida Statutes at the discretion of the Chair. Orderly fashion is deemed as, at a minimum (1) no profanity (2) no vulgar language (3) no discourteous, disrespectful, or disparaging conduct.

## IV. WORKSHOP

1. Presentation on Certificates of Participation 2025
2. Annual Investment Report Fiscal Year Ending June 30, 2024
3. Update on Enrollment and Future Schools
4. Discussion Regarding School Board Policies, to Include New Policies

## V. ADJOURNMENT

**AGENDA ITEM NO. II.1**

**School Board of Manatee County**
**September 13, 2024 - Workshop**

**Title**
Agenda Amendments - *added after publishing*

**Executive Summary**
The Chair finds good cause to amend the agenda to include:

Agenda amended on Thursday September 12, 2024 to **add** Presentation to Workshop Item *Update on Enrollment and Future Schools.*

Agenda amended on Thursday September 12, 2024 to **remove** erroneous attachment *Annual Report - Manatee CS June 30, 2024* **from** Workshop item *Presentation on Certificates of Participation 2025*

**Contact**
**Submitting Department**: School Board
**Initiated By**: Chad Choate

**AGENDA ITEM NO. IV.1**

**School Board of Manatee County**
**September 13, 2024 - Workshop**

**Title**
Presentation on Certificates of Participation 2025

**Executive Summary**
Ms. Rachel Sellers, Deputy Superintendent of Business Services, and Mr. Joseph Ranaldi, Chief Operations Officer, will present to the Board the projects identified in the Certificates of Participation, Series 2025. Mr. Jay Glover, Managing Director, PFM Financial Advisors LLC, will present to the Board a Debt Overview/Certificates of Participation, Series 2025 presentation.

**Contact**
Submitting Department: Business Services
Initiated By: Rachel Sellers

Attachments:
Certificates of Participation Presentation - Series 2025

# The School District of Manatee County, Florida

# Debt Overview / COPs, Series 2025A

**September 13, 2024**

PFM Financial Advisors, LLC

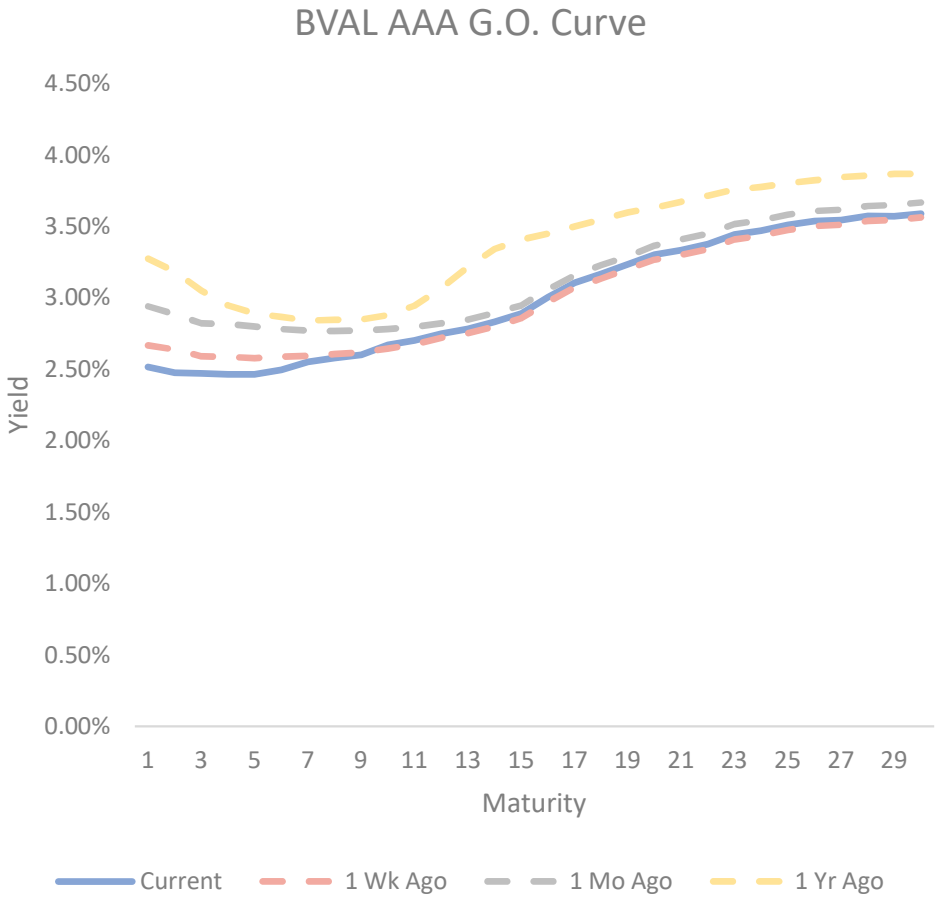
200 S. Orange Ave
Suite 760
Orlando, FL 32801

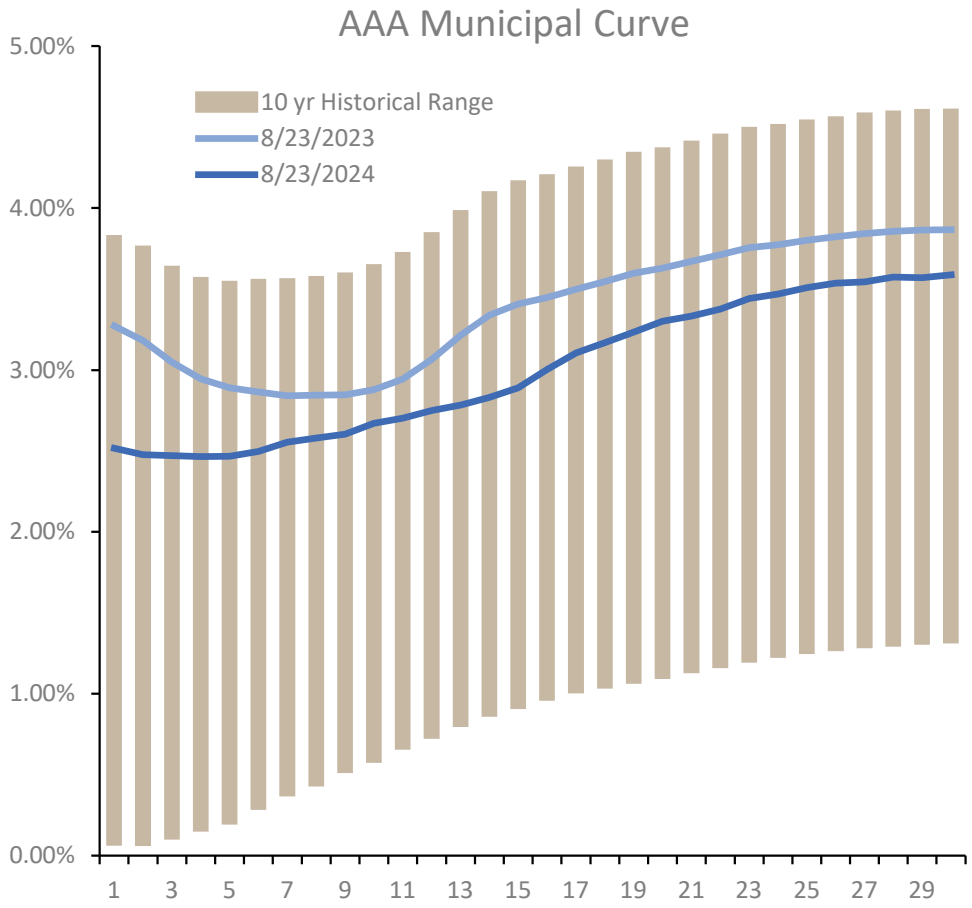
407.648.2208

**pfm.com**

# Municipal Market Conditions

- Tax-exempt interest rates have declined over the last year and remain just above the 10-year historical average



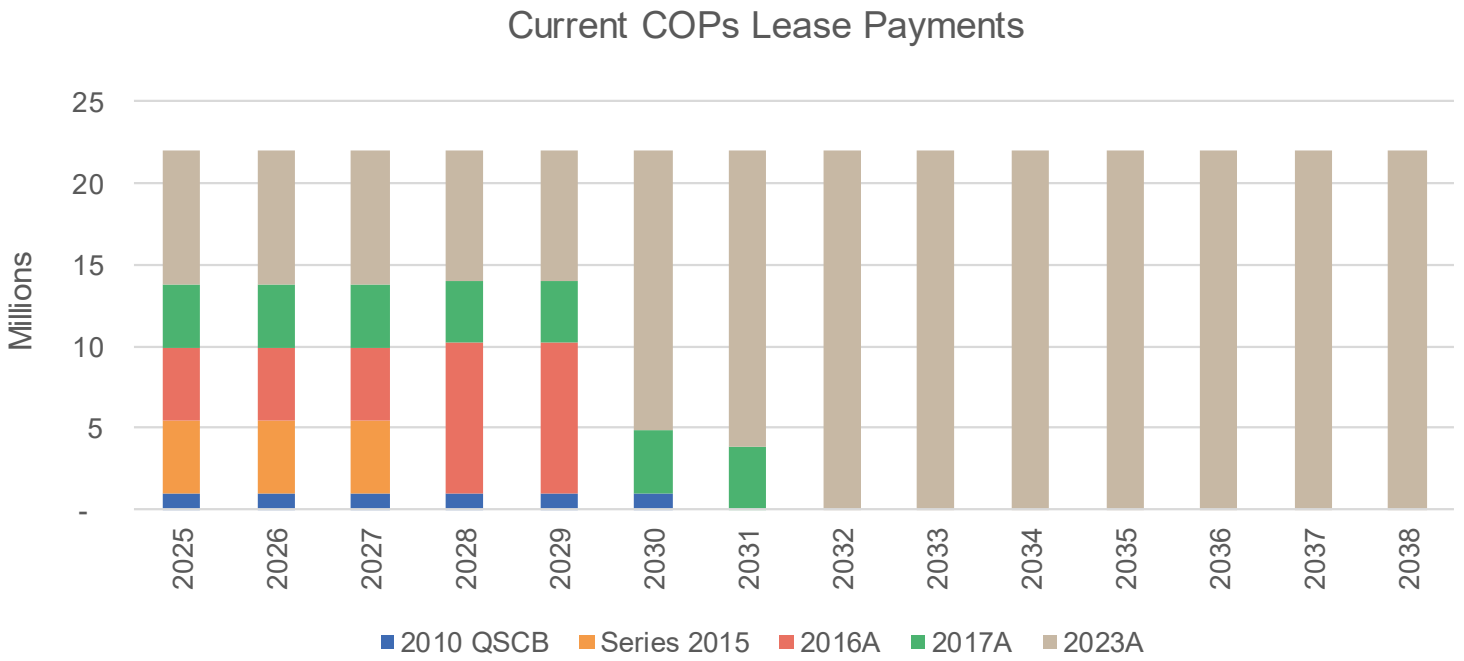




Market Rates as of August 23, 2024

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# Debt Service – COPs Summary

- 0.292 mills of the available 1.50 mills is required to cover maximum annual debt service of $22.02 million occurring in 2033 (assumes FY 2025 taxable assessed value of $78.6 billion)

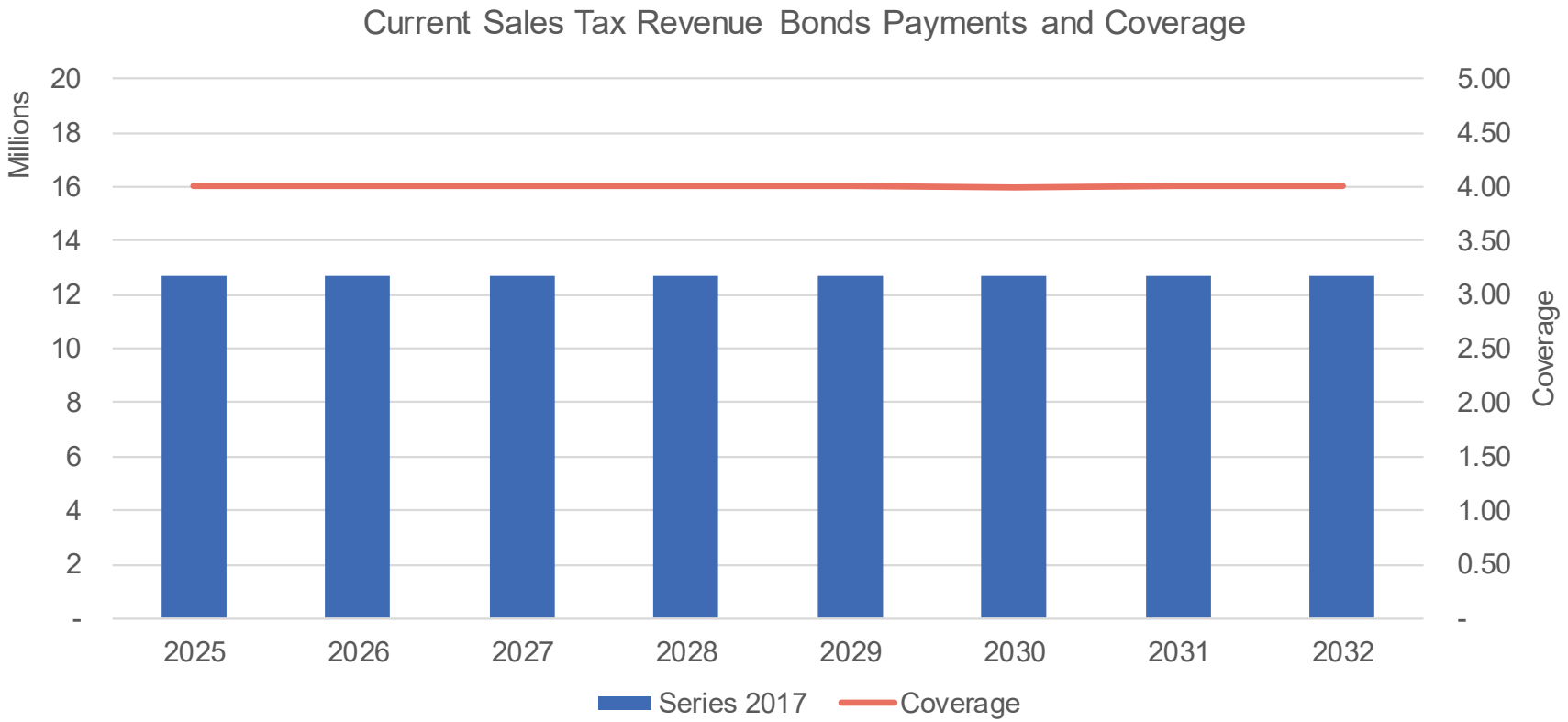



| Outstanding Certificates of Participation | | | | | | |
|---|---|---|---|---|---|---|
| **Series** | **Type** | **Dated Date** | **Final Maturity** | **Issue Size** | **Outstanding Par** | **Call Date** |
| Series 2010 QSCB | New Money - Bank Note | 10/26/2010 | 10/01/2029 | 21,600,000 | 6,191,053 | N/A |
| Series 2015 | Refunding - Bank Note | 12/16/2015 | 07/01/2027 | 38,470,000 | 12,615,000 | 07/01/2023 |
| Series 2016A | Refunding - Public Offering | 10/27/2016 | 07/01/2029 | 36,780,000 | 26,875,000 | 07/01/2026 |
| Series 2017A | Refunding - Bank Note | 12/20/2017 | 07/01/2031 | 55,890,000 | 24,085,000 | Make-whole anytime |
| Series 2023A | New Money - Public Offering | 05/25/2023 | 07/01/2038 | 151,730,000 | 151,730,000 | 7/1/2033 |
| **Total** | | | | **$ 304,470,000** | **$ 221,496,053** | |

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# Debt Service – Sales Tax Summary

- The District has budgeted receipt of $50.7 million in sales tax revenues in 2024. The District utilized $12.7 million to pay debt service which equates to coverage of 4.0 times




| Outstanding Sales Tax Revenue Bonds | | | | | | |
|---|---|---|---|---|---|---|
| Series | Type | Dated Date | Final Maturity | Issue Size | Outstanding Par | Call Date |
| Series 2017 | New Money - Public Offering | 02/23/2017 | 10/01/2032 | $ 131,785,000 | $ 81,945,000 | 04/01/2027 |

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# Refundings

- The District proactively monitors the opportunity to refinance outstanding debt for savings. Below is a summary table of the refundings the District has taken advantage of since 2012. This has resulted in over $15 million in cash flow savings

**School District of Manatee County Refunding Summary**

| Credit | Refunding Series | Dated Date | Refunding Par ($) | Refunded Series | Net Present Value Savings ($) | Net Present Value Savings (%) | Cashflow Savings ($) | Average Annual Cash Flow Savings ($) | Rate / TIC | Final Maturity |
|---|---|---|---|---|---|---|---|---|---|---|
| COP | 2017A | 12/20/2017 | 55,890,000 | 2008A & 2011A | 4,317,413 | 8.28% | 5,042,952 | 397,779 | 2.57% | 2031 |
| COP | 2016A | 10/27/2016 | 36,780,000 | 2009 | 3,548,236 | 8.98% | 4,228,977 | 333,574 | 2.64% | 2029 |
| COP | 2015 | 12/16/2015 | 38,470,000 | 2005A & 2007 | 2,524,447 | 6.94% | 2,975,219 | 257,781 | 2.92% | 2027 |
| Sales Tax | 2012 | 4/3/2012 | 49,490,000 | 2003 | 2,938,851 | 6.36% | 3,044,058 | 554,025 | 1.28% | 2017 |
| **Total** | | | **$ 180,630,000** | | **$ 13,328,948** | | **$ 15,291,206** | **$ 1,543,158** | | |

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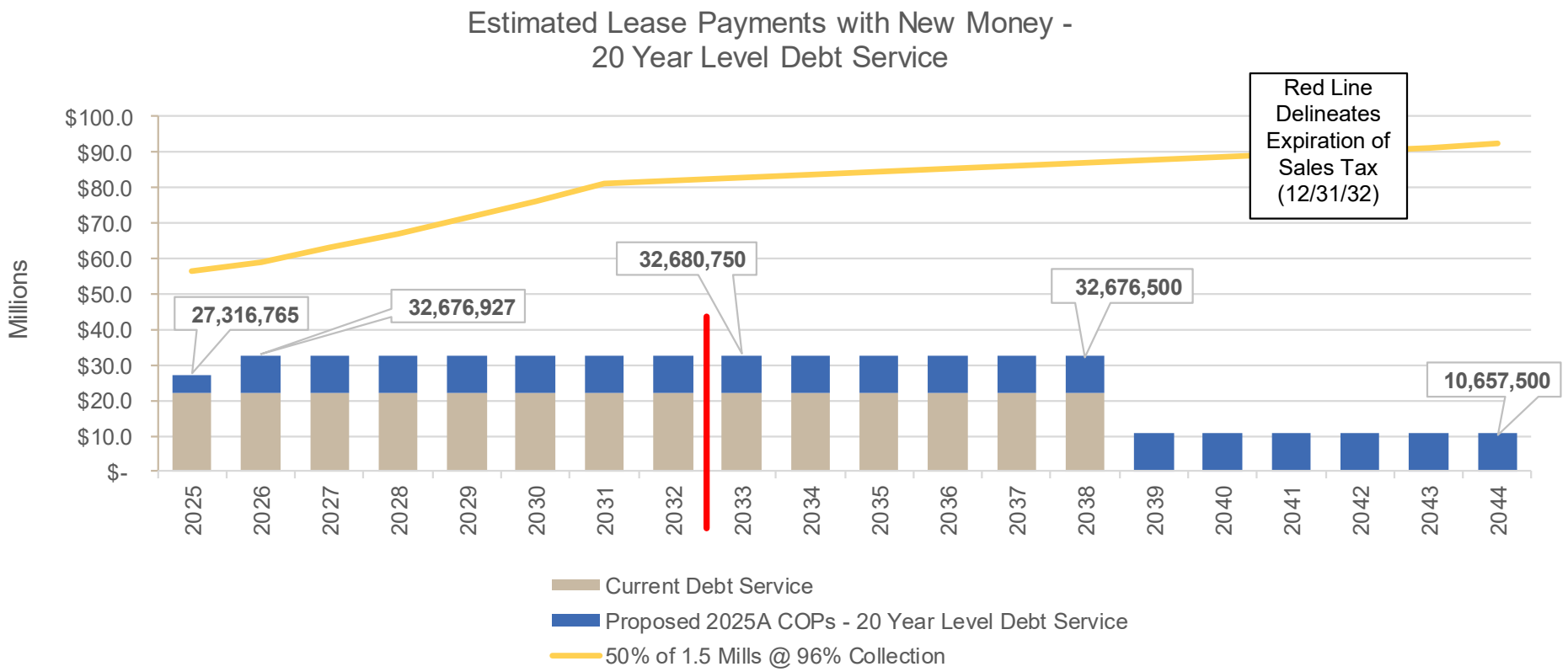
# New Money Needs

- The District is proposing to issue Certificates of Participation, Series 2025A (the "2025A COPs" to fund a portion of the costs of the below listed projects.
  - **Artisan Lakes Elementary School:**
    - Scope: New Site located on the south side of Buckeye Road approximately 2,100' west of Artisan Lakes Parkway
    - Number of Acres: 28.7
    - Estimated Total Project Budget: $ 70,000,000
  - **Rye Ranch Elementary School:**
    - Scope: New Site located within Rye Ranch and approximately 1.1 miles southeast of the intersection of North Rye Road and Rutland Road
    - Number of Acres: 18
    - Estimated Total Project Budget: $ 70,000,000

- As financial advisor to the District, PFM analyzed different financing structures to determine the optimal plan of finance that minimized debt service cost and maintained future flexibility to fund additional projects.

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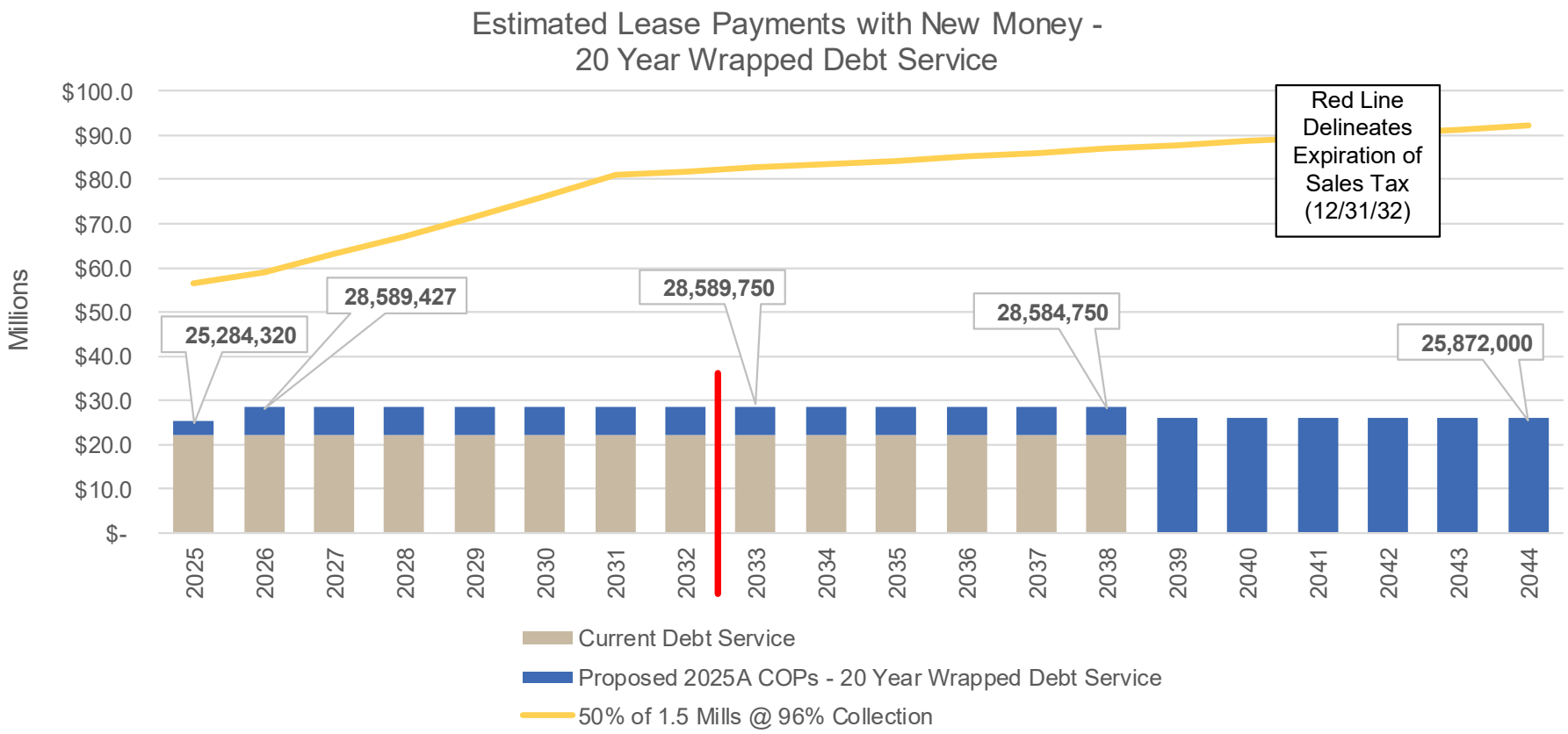
# 2025A COPs – 20 Year Final Maturity (Level Debt Service)




| | 20 Year Level Debt Structure |
|---|---|
| **Project Fund** | $140,000,000 |
| **Final Maturity** | 7/1/2044 |
| **True Interest Cost** | 4.16% |
| **Average Life (years)** | 11.76 |
| **Net Interest** | 66,800,000 |
| **Avg. Annual Debt Service** | 10,660,000 |
| **Aggregate MADS** | **32,680,750** |
| **Millage Required** | **0.4328** |

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# 2025A COPs – 20 Year Final Maturity (Wrapped Debt Service)




| | 20 Year Wrapped Debt Structure |
|---|---|
| **Project Fund** | $140,000,000 |
| **Final Maturity** | 7/1/2044 |
| **True Interest Cost** | 4.41% |
| **Average Life (years)** | 17.14 |
| **Net Interest** | 102,855,000 |
| **Avg. Annual Debt Service** | 12,510,000 |
| **Aggregate MADS** | **28,589,750** |
| **Millage Required** | **0.3786** |

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# 2025A COPs – Summary

- The table below provides a summary of the two (2) financing options:

| | 20 Year Level Debt Structure | 20 Year Wrapped Debt Structure |
|---|---|---|
| **Project Fund** | $140,000,000 | $140,000,000 |
| **Final Maturity** | 7/1/2044 | 7/1/2044 |
| **True Interest Cost** | 4.16% | 4.41% |
| **Average Life (years)** | 11.76 | 17.14 |
| **Net Interest** | 66,800,000 | 102,855,000 |
| **Avg. Annual Debt Service** | 10,660,000 | 12,510,000 |
| **Aggregate MADS** | **32,680,750** | **28,589,750** |
| **Millage Required** | **0.4328** | **0.3786** |

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# 2025A COPs – Parameters

- The resolutions being considered by the School Board and Leasing Corporation authorize this issuance of the 2025A COPs based on meeting certain parameters:
  - Not to exceed par amount of $150,000,000
  - Not to exceed underwriter's discount of 0.40% of the par amount
  - Not to exceed True Interest Cost of 5.00%
  - Not to exceed final maturity of July 1, 2045

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**AGENDA ITEM NO. IV.2**

**School Board of Manatee County**
**September 13, 2024 - Workshop**

**Title**
Annual Investment Report Fiscal Year Ending June 30, 2024

**Executive Summary**
Mr. David Jang and Mr. Dominick Cristofaro of Deep Blue Investment Advisors will provide the Board with a briefing on the Annual Investment Report Fiscal Year Ending June 30, 2024

**Contact**
Submitting Department: Business Services
Initiated by: Rachel Sellers

Attachments:
Annual Report - Manatee CS June 30, 2024 FINAL

FL FIT
FLORIDA FIXED INCOME TRUST

**Presented by:**

**David Jang, CTP**
**Chairman**

**Brent Wertz**
**Chief Executive Officer/President**

**Dominick Cristofaro**
**Director, Client Advisory Services**

**John Scott**
**Associate, Client Advisory**

**Benjamin Streed, CFA**
**Chief Investment Officer**




# Annual Portfolio Report

## July 1, 2023 - June 30, 2024

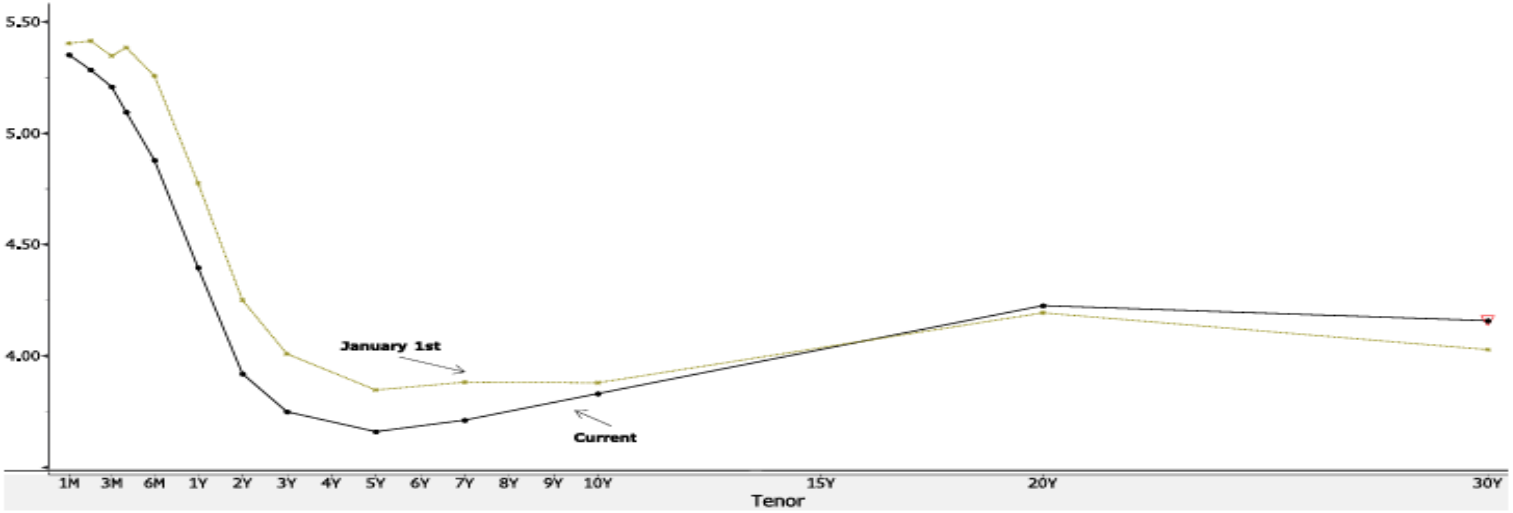
# Current Market Conditions

**Interest Rates:**

- **When will the Fed begin cutting rates, and by how much? Is inflation headed back to the target level of 2%, or is there some work still to be done? These are the two major questions to be answered in 2024. As of early August, inflation continues to flatline, but economic data is going for a mixed skew to more of a negative skew.**

- **Longer-term rates not only reflect current economics but need to factor in additional uncertainty surrounding geopolitical events, inflation, employment, consumer spending, and concerns that the US government will continue to borrow money, thereby adding to an already large fiscal deficit.**

- **Since the start of the year, interest rates had risen, primarily driven by positive economic data and expectations of delayed rate cuts. However, in the last few weeks, the yield curve has shifted lower dramatically, driven by softer economic data in jobless claims, ISM manufacturing, nonfarm payrolls, and the unemployment rate.**




*Source: Bloomberg LP*

*This presentation is for Institutional Investors Only – Not for Public Distribution*

# Current Market Conditions

**The Federal Reserve:**

- **On July 31st, 2024, Federal Reserve policymakers opted to keep rates unchanged, maintaining the target rate at 5.25%-5.50%. Per the Labor Department, the U.S. economy added just 114,000 jobs in July, and the unemployment rate moved up to 4.3%, giving the Fed some ammunition to justify a rate cut at its September meeting.**

- **While the Federal Reserve dot plot shows an expectation of just 1 rate cut by year end, market participants are now pricing in close to 5 rate cuts by year end.**

- **Market sentiment has experienced a significant shift in rate cut expectations. In January, investors were pricing in over five 25-basis point cuts. Then consensus shifted to two rate cuts after strong economic data persisted. Now the consensus has shifted back to approximately 5 rate cuts as economic data is starting to noticeably weaken.**

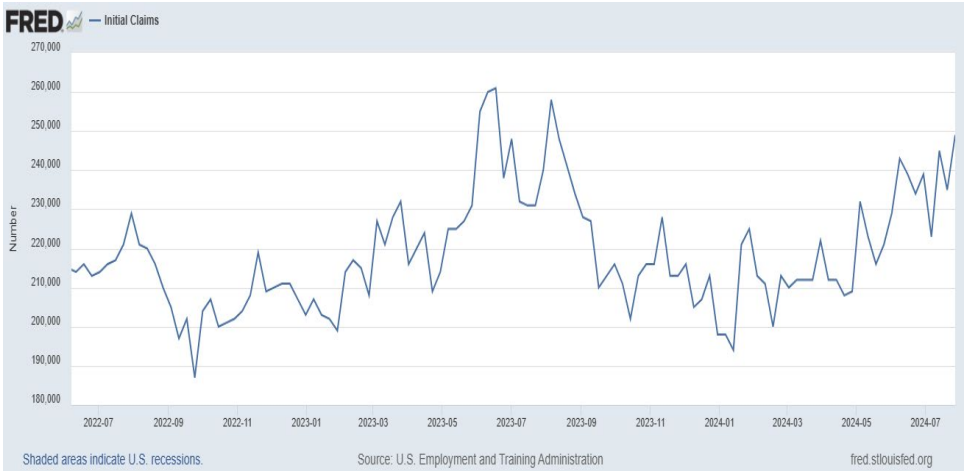



*Source: Bloomberg LP*

# Current Market Conditions

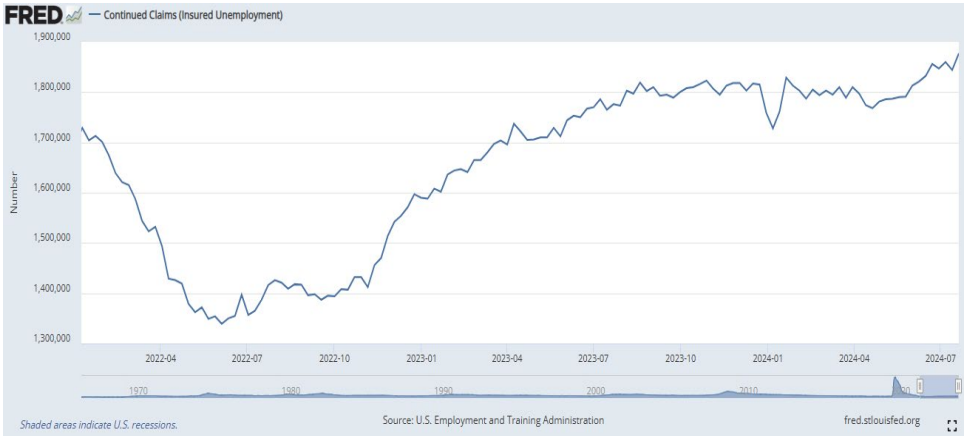
**US Labor Market – US Initial Jobless Claims**

- **Initial jobless claims have ticked up, coming in at 249k for the week ending July 27th, up 14k from the prior week's level of 235k. Initial jobless claims have remained low for quite some time now, but the trend is clearly up since the beginning of the year.**




**US Labor Market – US Continuing Claims**

- **Continuing claims continue to make new multi-year highs, coming in at 1,877k, up 33k from the prior week's revised level. Continuing claims are starting to move out of their discernible range from August 2023 to June 2024.**




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# Investment Summary

Investment Summary as of June 30, 2024

| Investments | Average Maturity | | Fair Value |
|---|---|---|---|
| FL FIT Cash Pool | 115 Days | $ | 75,158,928.86 |
| FL FIT Enhanced Cash Pool | 1.19 Years | $ | 257,435.12 |
| FL FIT Cash Pool - Millage | 115 Days | $ | 14,435,907.77 |
| Florida PRIME | 47 Days | $ | 125,940,436.70 |
| Florida PALM | 38 Days | $ | 72,626,736.57 |
| Florida CLASS | 26 Days | $ | 56,200,577.19 |
| Subtotal | | $ | 344,620,022.21 |

| Bond Porceeds | Average Maturity | | Fair Value |
|---|---|---|---|
| FL FIT Cash Pool - COP 2023A | 115 Days | $ | 39,759,660.31 |
| FL FIT Choice Pool Jun 25 - COP 2023A | 124 Days | $ | 102,959,796.21 |
| Subtotal | | $ | 142,719,456.52 |
| Total Investments | | $ | 487,339,478.73 |

| Investment Ratings as of June 30, 2024 | S&P | Moodys | Fitch |
|---|---|---|---|
| FL FIT Cash Pool | - | - | AAAf/S1 |
| FL FIT Enhanced Cash Pool | - | - | AAAf/S1 |
| FL FIT Choice Pool | - | - | AAAf |
| Florida PRIME | AAAm | - | - |
| Florida PALM | AAAm | - | - |
| Florida CLASS | AAAm | - | - |

*Does not include balances held at JP Morgan.

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# Portfolio Statistics

Portfolio Statistics as of June 30, 2024

| Investments | Market Value + Accrued | Fiscal Year 2024 Earned Income | Change in Fair Market Value |
|---|---|---|---|
| FL FIT Cash Pool | $ 75,158,928.86 | $ 3,170,635.89 | $ - |
| FL FIT Enhanced Cash Pool | $ 257,435.12 | $ 12,591.14 | $ 336.90 |
| FL FIT Cash Pool - Millage | $ 14,435,907.77 | $ 1,171,575.65 | $ - |
| Florida PRIME | $ 125,940,436.70 | $ 6,831,767.62 | $ - |
| Florida PALM | $ 72,626,736.57 | $ 4,239,018.59 | $ - |
| Florida CLASS | $ 56,200,577.19 | $ 3,720,303.85 | $ - |
| Subtotal | $ 344,620,022.21 | $ 19,145,892.74 | $ 336.90 |

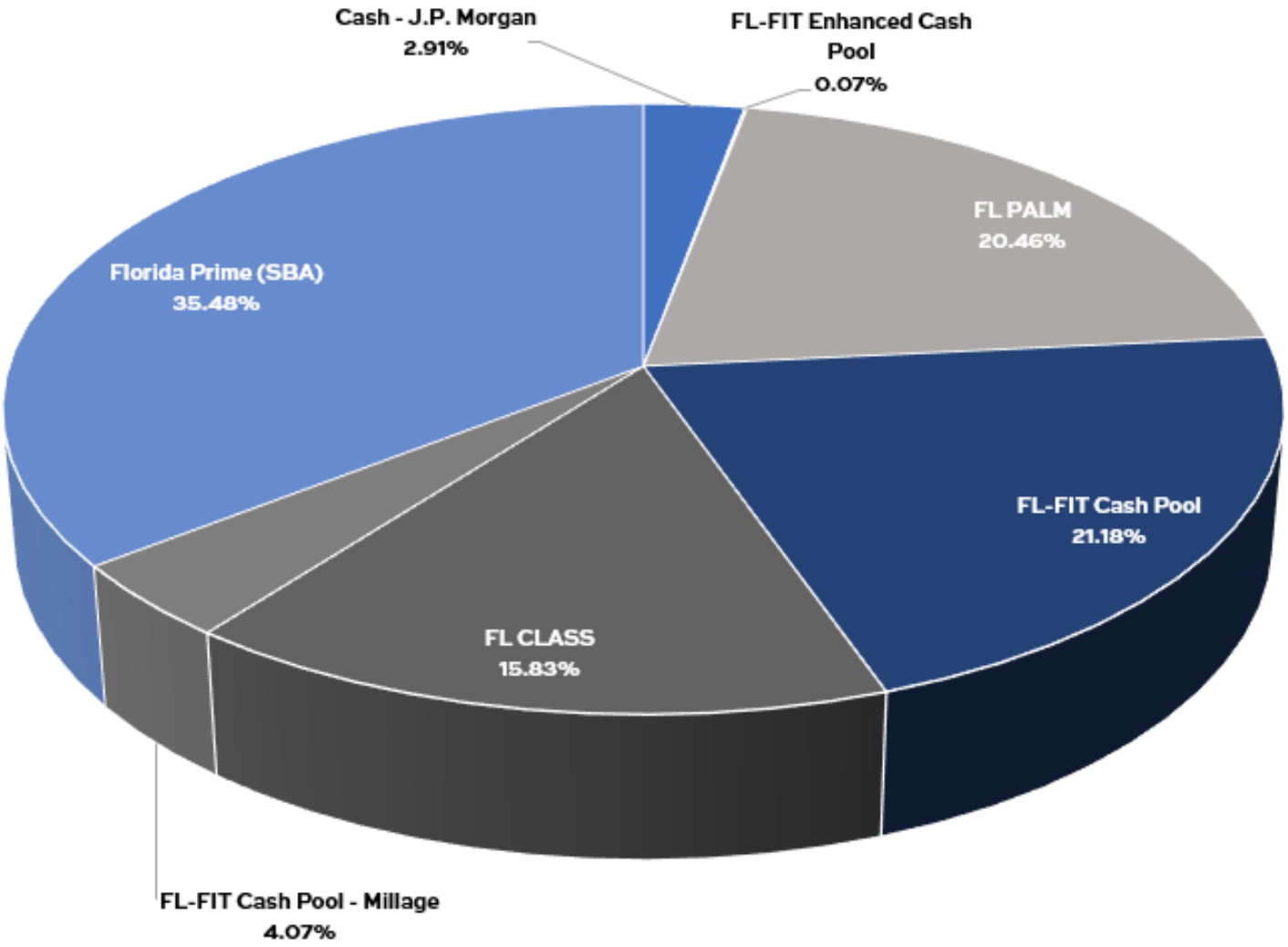
| Bond Proceeds | Market Value + Accrued | Fiscal Year 2024 Earned Income | Change in Fair Market Value |
|---|---|---|---|
| FL FIT Cash Pool - COP 2023A | $ 39,759,660.31 | $ 2,649,011.23 | $ - |
| FL FIT Choice Pool - COP 2023A | $ - | $ 2,664,839.57 | $ - |
| FL FIT Choice Pool Jun 25 - COP 2023A | $ 102,959,796.21 | $ 2,455,149.00 | $ - |
| Subtotal | $ 142,719,456.52 | $ 7,768,999.80 | $ - |
| Total | $ 487,339,478.73 | $ 26,914,892.54 | $ 336.90 |
| | | Total Change in Value | $ 26,915,229.44 |

* Does not include balances held at JP Morgan.

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# Characteristics

**Portfolio Allocation as of 6/30/2024**

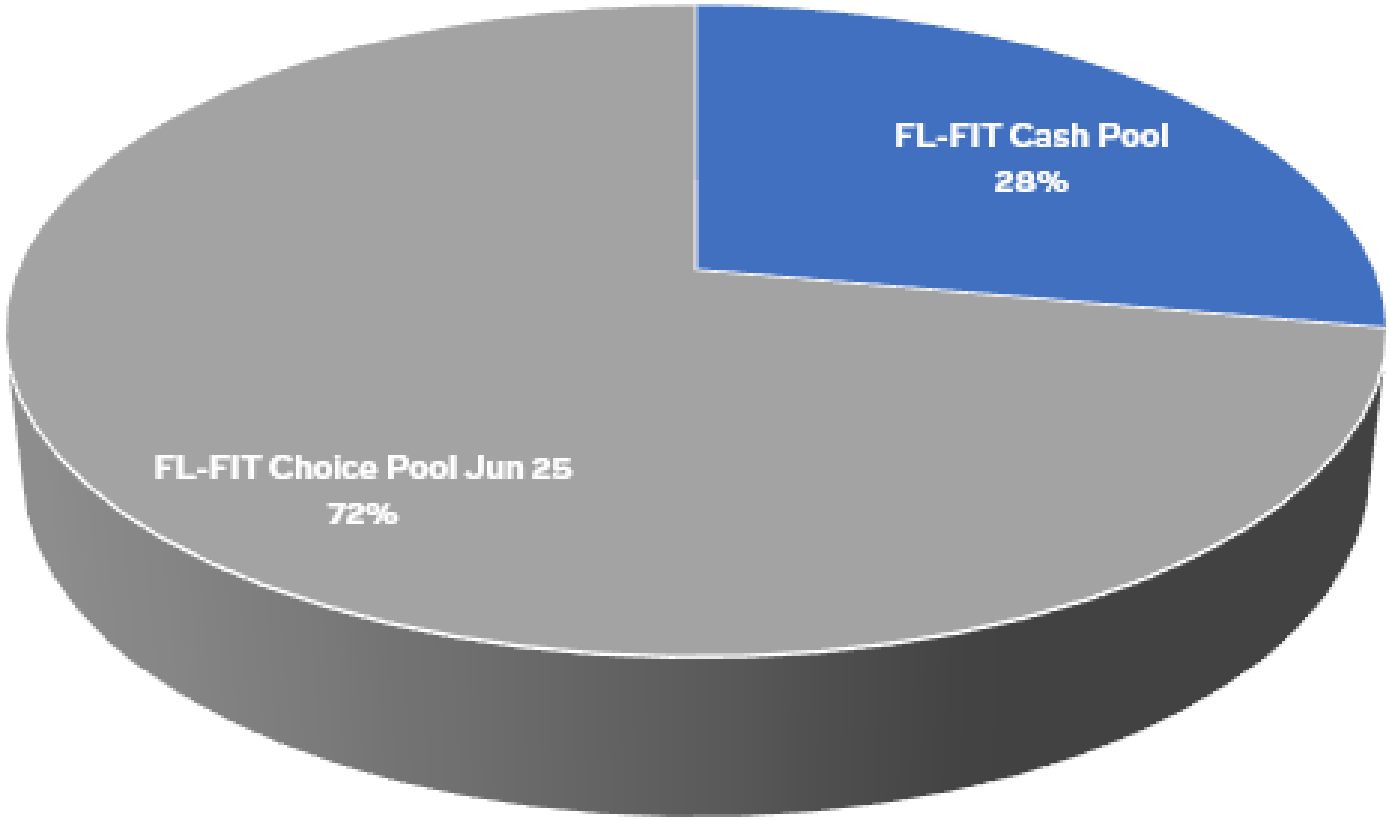



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# Characteristics

**Portfolio Allocation as of 6/30/2024**

## COP 2023A Accounts




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# Asset Allocation Compliance

**Cash and Investment Account Balances**
**As of June 30, 2024**

| Authorized Investment - Sector Type | | Book Value | Current Allocation | Permitted By Policy | Issuer | In Compliance | Maturity | Rating |
|---|---|---|---|---|---|---|---|---|
| Compensating Bank Balance | $ | 10,311,660.10 | 2.91% | N/A | N/A | N/A | N/A | N/A |
| Florida Prime Fund | $ | 125,940,436.70 | 35.48% | 100% | N/A | Yes | N/A | AAAm |
| US Government Securities | $ | - | 0.00% | 100% | N/A | Yes | 5 yrs | rated |
| US Government Agency Bonds | $ | - | 0.00% | 50% | 25% | Yes | 5 yrs | rated |
| Government Sponsored Enterprised (GSE) | $ | - | 0.00% | 80% | 50% | Yes | 5 yrs | rated |
| Repurchase Agreements | $ | - | 0.00% | 50% | 20% | Yes | 30 Days | A |
| Time Deposits or Savings Accounts | $ | - | 0.00% | 25% | 15% | Yes | 1 yr | N/A |
| Commercial Paper | $ | - | 0.00% | 35% | 10% | Yes | 270 days | A1/P1 |
| Corporate Notes | $ | - | 0.00% | 25% | 5% | Yes | 3 yrs | A |
| State / Local Taxable & Tax Exempt Debt | $ | - | 0.00% | 20% | 10% | Yes | 3 yrs | A (MIG -2, SP - 2, F-2) |
| Money Market Funds | $ | - | 0.00% | 100% | 50% | Yes | WAM < 60 Days | AAAm |
| Short Term Bond Funds | $ | - | 0.00% | 25% | 10% | Yes | 3 year duratoin | AAf |
| Intergovernment Investment Pools | $ | 218,679,585.51 | 61.61% | 100% | 50% | Yes | N/A | AAAm / Aaf |
| **Total** | **$** | **354,931,682.31** | **100.00%** | | | | | |

*This presentation is for Institutional Investors Only – Not for Public Distribution*

# Asset Allocation Compliance

| Authorized Investment - Sector Type | | Book Value | Current Allocation | Individual Issue Limits | In Compliance |
|---|---|---|---|---|---|
| Compensating Bank Balance | | | | | |
| JP Morgan | $ | 10,311,660.10 | 2.91% | N/A | N/A |
| Florida Prime Fund | | | | | |
| Florida Prime (SBA) | $ | 125,940,436.70 | 35.48% | 100% | Yes |
| US Government Securities | | | 0.00% | 100% | Yes |
| US Government Agency Bonds | | | 0.00% | 25% | Yes |
| Government Sponsored Enterprised (GSE) | | | 0.00% | 50% | Yes |
| Repurchase Agreements | | | 0.00% | 15% | Yes |
| Time Deposits or Savings Accounts | | | 0.00% | 25% | Yes |
| Commercial Paper | | | 0.00% | 10% | Yes |
| Corporate Notes | | | 0.00% | 5% | Yes |
| State / Local Taxable & Tax Exempt Debt | | | 0.00% | 10% | Yes |
| Money Market Funds | | | 0.00% | 50% | Yes |
| Short Term Bond Funds | | | 0.00% | 10% | Yes |
| Intergovernment Investment Pools | | | | | |
| FL PALM | $ | 72,626,736.57 | 20.46% | 50% | Yes |
| FL-FIT Cash Pool* | $ | 75,158,928.86 | 21.18% | 50% | Yes |
| FL-FIT Enhanced Cash Pool | $ | 257,435.12 | 0.07% | 50% | Yes |
| FL-FIT Cash Pool - Millage* | $ | 14,435,907.77 | 4.07% | 50% | Yes |
| FL CLASS | $ | 56,200,577.19 | 15.83% | 50% | Yes |
| **Total** | **$** | **354,931,682.31** | **100.00%** | | |

***Note: FL-FIT Cash Pool combined allocation (millage & general) comprises 25.25%, under the 50% individual issue limit.**

# Asset Allocation Compliance

**Cash and Investment Account Balances**

**COP 2023A as of June 30, 2024**

| Authorized Investment - Sector Type | | Book Value | Current Allocation | Permitted By Policy | In Compliance |
|---|---|---|---|---|---|
| Compensating Bank Balance | $ | - | 0.00% | N/A | Yes |
| Florida Prime | $ | - | 0.00% | 100% | Yes |
| US Government Securities | $ | - | 0.00% | 100% | Yes |
| US Government Agency Bonds | $ | - | 0.00% | 50% | Yes |
| Government Sponsored Enterprised (GSE) | $ | - | 0.00% | 80% | Yes |
| Repurchase Agreements | $ | - | 0.00% | 50% | Yes |
| Time Deposits or Savings Accounts | $ | - | 0.00% | 25% | Yes |
| Commercial Paper | $ | - | 0.00% | 35% | Yes |
| Corporate Notes | $ | - | 0.00% | 25% | Yes |
| State / Local Taxable & Tax Exempt Debt | $ | - | 0.00% | 20% | Yes |
| Money Market Accounts | $ | - | 0.00% | 100% | Yes |
| Short Term Funds | $ | - | 0.00% | 25% | Yes |
| Intergovernment Investment Pools | $ | 142,719,456.52 | 100.00% | 100% | Yes |
| **Total** | **$** | **142,719,456.52** | **100.00%** | | |

*This presentation is for Institutional Investors Only – Not for Public Distribution*



Presenters' Bio

# David Jang

## David Jang, CTP

***Chairman***

35 Years Investment Experience

**David Jang is the Chairman of Deep Blue Investment Advisors and directs the firm's strategic growth. David's investment advisory experience, client-focused approach and understanding of the multiple components affecting local governments enables him to provide valuable insight to treasury management, investment management and consulting clients. David routinely speaks at Florida's Government associations, chapters, conferences and CPE seminars which address local, current economic conditions and challenges facing Florida's entities. He serves on the firm's credit and investment committees and is the President of the US Fixed Income Trust.**

**Prior to joining Deep Blue Investment Advisors, David spent 12 years working with Florida local government clients and 35 years overall in investment advisory services.**

**David earned his Bachelor's degree in Economics from the Wharton School, University of Pennsylvania. He earned the Association of Financial Professionals (AFP) designation of Certified Treasury Professional (CTP). David is a Registered Investment Advisor with the Florida Department of Financial Regulation.**



Presenters' Bio

# Brent Wertz

## Brent Wertz

***Chief Executive Officer/President***

**24 Years Investment Experience**

**Brent Wertz is the Managing Partner at Deep Blue Investment Advisors. Brent provides strategic leadership for the company and is responsible for overseeing all aspects of the firm's investment process. He heads implementation of the firm's investment strategies and portfolio risk management. He serves on the firm's investment and credit committees.**

**Brent started Deep Blue Investment Advisors based on his experience serving as a consultant to special taxing districts throughout the State of Florida assisting these districts in bond offerings, assessment allocation, and collections as well as assisting District Managers with treasury management.**

**Brent is a graduate of Virginia Military Institute with a B.A., Economics. Brent received his Master's in Business Administration from the University of Tampa**



Presenters' Bio

# Dominick Cristofaro

## Dominick Cristofaro

***Director of Client Advisory Services***

**29 Years Investment Experience**

**Dominick Cristofaro is a Director, Client Advisory Services. Dominick is responsible for developing and servicing client relationships, including cities, counties, special districts, and other public entities.**

**Prior to joining Deep Blue Investment Advisors, Dominick spent 8 years with the District School Board of Pasco County where he served as Treasurer and Director of Finance Services. Prior to Pasco County, he has a wide array of investment experience including financial advising, managing institutional portfolios, and trading.**

**Dominick received his Master's in Business Administration from the University of Hartford and his Bachelors of Science in Business Administration from the University of Connecticut in Storrs, CT. He currently holds a FINRA Series 65 license.**



Presenters' Bio

# Benjamin Streed

## Benjamin Streed, CFA

***Chief Investment Officer***

**17 Years Investment Experience**

**Benjamin Streed is the Chief Investment Officer. As CIO, he is an integral component of our firmwide commitment to attract and retain industry leaders who will better service our clients and local communities. His focused efforts to build out our front, middle, and back office will position us for continued growth.**

**Before becoming CIO, he served as CFA Director of Fixed Income for several years. In this role he worked with investment professionals to deliver comprehensive, custom, diversified portfolio management strategies for separately managed accounts, consulting clients, and the U.S. Fixed Income Trust local government investment pools. Benjamin will continue directing the Portfolio Management team and serving on the firm's investment and credit committees. He will further develop as a thought leader in the investment space — attending industry seminars and speaking engagements to educate our clients and prospects.**

**Prior to joining Deep Blue, Benjamin served as a fixed income portfolio strategist with Wells Fargo Private Bank. There, he was a member of the investment strategy committee and the strategic and tactical asset allocation sub-committees. He has also served as an investment analyst and portfolio manager where he focused on providing unique investment solutions for high-net-worth families.**

**Benjamin earned a Bachelor of Science degree in business administration with a focus on finance from Emory University and a Master of Science in finance (MSF) from Georgetown University where he graduated as class valedictorian. He is a CFA® charter holder and frequently volunteers his time with the CFA curriculum advisory committee and the Georgetown MSF alumni council.**

*This presentation is for Institutional Investors Only – Not for Public Distribution*



Presenters' Bio

# John Scott

## John Scott

***Client Advisory Associate***

**2 Years Financial Experience**

**John Scott is a Client Advisory Associate at Deep Blue Investment Advisors. John plays a key role in supporting the Client Advisory team, specializing in cultivating new and existing client investment relationships with an emphasis on separately managed accounts and Florida Fixed Income Trust (FL-FIT) investment pools.**

**Before joining Deep Blue, John dedicated fourteen years to teaching mathematics. He transitioned into the wealth management sector as an Operations Analyst at Members Trust Company, where he honed his account management and client service acumen. His background in education paired with these skills makes him a valuable and dynamic asset to our team**

**John holds a Bachelor of Science degree in secondary mathematics education from St. Petersburg College. He currently holds a FINRA Series 65 license.**

# Disclosures

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Performance data quoted represents past performance; past performance does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance of the fund may be lower or higher than the performance quoted.

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## PORTFOLIO MANAGEMENT

| | | | |
|---|---|---|---|
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| Dan Marro, CFA | Portfolio Manager | dan.marro@deepblue-inv.com | 813-321-3253 |

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| Vito Resciniti | Market Strategy & Research Analyst | vito.resciniti@deepblue-inv.com | 813-556-9774 |
| Liz Gonzalez | Director of Reporting | liz.gonzalez@deepblue-inv.com | 813-321-3255 |
| Courtney Hislop | Senior Reporting Analyst | courtney.hislop@deepblue-inv.com | 813-556-9779 |

## ADMINISTRATION

| | | | |
|---|---|---|---|
| Suanne Lee | Director of Admin and Finance | suanne.lee@deepblue-inv.com | 813-321-3250 |
| Liz Albert-Ramos | Administrative Assistant | liz.albert-ramos@deepblue-inv.com | 813-321-4008 |

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**AGENDA ITEM NO. IV.3**

**School Board of Manatee County**
**September 13, 2024 - Workshop**

**Title**
Update on Enrollment and Future Schools

**Executive Summary**
Topics to include:
Enrollment and Student assignment
Construction update
New School Enrollment and programming

**Contact**
**Submitting Departments**: Office of Student Assignment, Construction, Administration

Attachments:
Update on Enrollment & Future Schools_WS_09.13.2024

# Update on Enrollment and Future Schools

## School Board Workshop
## September 13, 2024

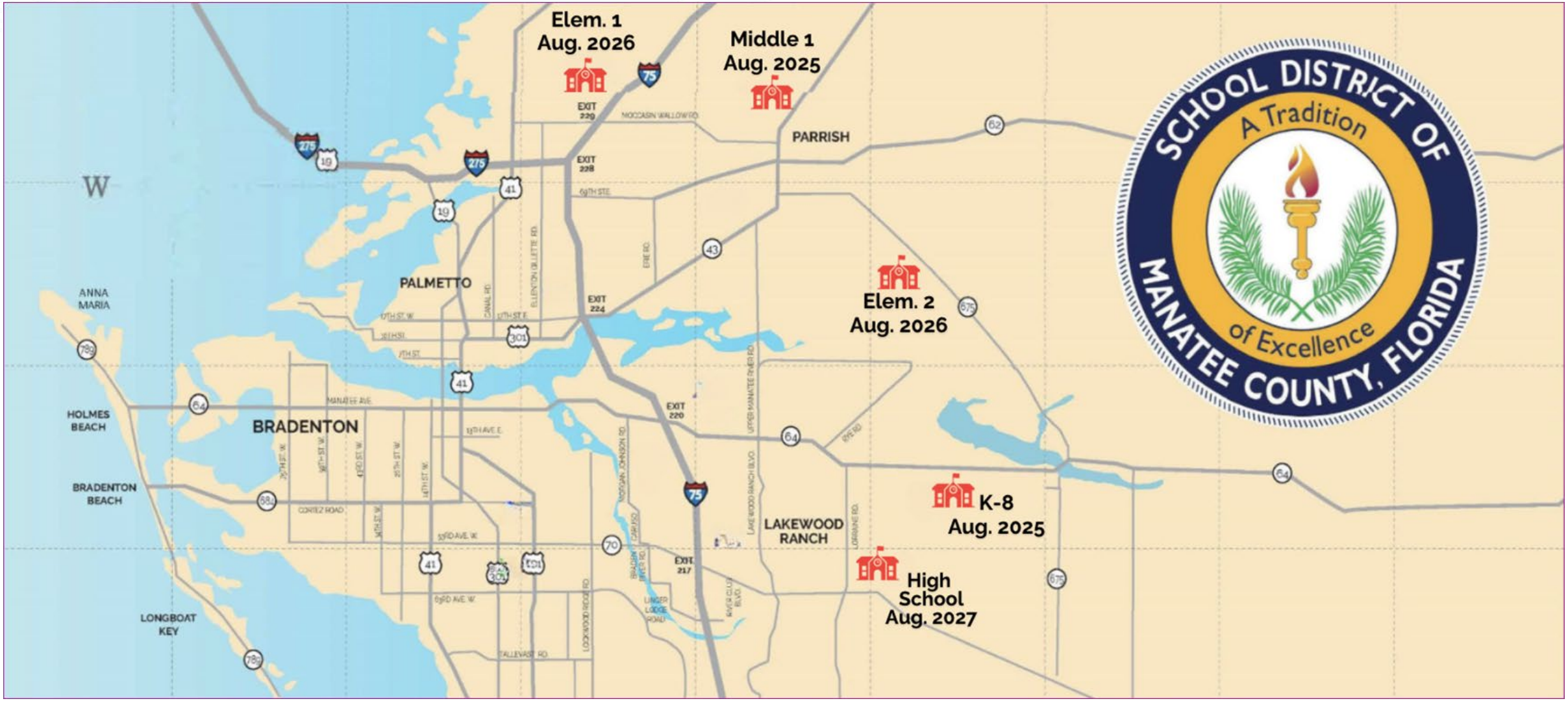
# SY 24-25 Enrollment Update

| | 2024-25 Day 8 | 2023-24 Day 10 | Difference |
|---|---|---|---|
| | 8/21/2024 | 8/23/2023 | |
| ES, incl. ESE PK | 19257 | 18652 | 605 |
| MS | 7953 | 7948 | 5 |
| HS | 13616 | 13651 | -35 |
| Other Sites | 805 | 825 | -20 |
| Charters | 10849 | 10397 | 452 |
| | | | |
| Total | 52480 | 51473 | 1007 |
| | | | |

*These data exclude students in Voluntary PreKindergarten (not funded by Florida Education Finance Program), Home Education students (not funded by Florida Education Finance Program), and Florida Empowerment Scholarship, students (records maintained by scholarship organizations and transmitted to Florida Department of Education).

- Student enrollment increased by 1007 students from start of 2023-24 to 2024-25 school year
- Middle school enrollment stabilizing
- Grow enrollment through competitive, family-centered mindset
  - Enhance quality of articulation between levels, especially elementary to middle transition
  - Review of innovative programs and promote school pathways

# Growing with the Community



# School Choice Update

## Office of Student Assignment
## Director Jamara Clark

# Office of Student Assignment (OSA) Potential Next Steps

- Rebrand, Relocate, Reorganize OSA
- High expectations, high support
- Family Welcome Centers at SSC, PSC, and new Lakewood Ranch Office
- Empowering and informing families and schools
- Potential new technologies – Let's Talk
- Choice window (30 days) coming this Winter
- Update school choice policies and procedures to reflect changing choice and competition landscape







# Marketing Schools: Tell our story

- Best and First Choice for Families: A Tradition of Excellence
- Showcase the Excellence in Schools, Programs, Pathways, and School Cultures
- One pagers, Principal feeder visits, school tours, Middle School Showcase at MTC
- Multifaceted and competitive marketing strategy
- Safety, Excellence, and Friendly



# Construction Update

## Department of Construction Services
## Interim Director Reggie Goff

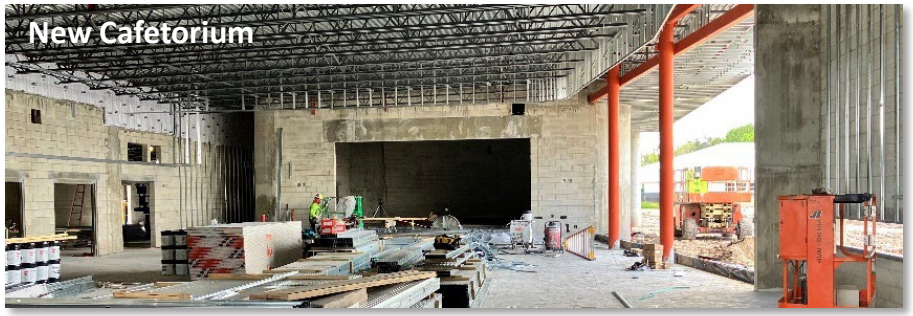
# Construction Update

**BLACKBURN ELEMENTARY SCHOOL**

**CM Agreement with A. D. Morgan, Inc. ($36,404,396)**
**A/E Agreement with Wannemacher Jensen Architects ($1,727,211)**

- **Budget** : $ 40,787,200
  - As of 9/1/24 Expended $13,996,143
  - As of 9/1/24 Sales Tax Savings $264,963
- **Funding Source:** COPS
- **Schedule**
  - Project Design Start: August 2022
  - Construction Start: August 2023
  - As of 9/1/24 - 37% Complete
  - Substantial Completion: Phased; final completion November 2025
  - Project On Schedule
- **Scope of Work**:
  - Replace Existing Building 1: Admin, Media, Cafeteria, Primary Classrooms; Complete renovation of existing HVAC, Plumbing, Electric, Technology, Building Envelope, & Interior Finishes; Improve on-site traffic queuing
  - Current Status: New Building 1 under construction; Existing Building 8 under renovation; New HVAC units & utilities installed
- **Project Director**: Jeffery Medwetz


New Building 1 Aerial View


New Cafetorium

BLACKBURN ELEMENTARY Together as one.

WJH architects

A.D. MORGAN

# Construction Update

**HAILE MIDDLE SCHOOL**

**CM Agreement with Halfacre Construction Company ($36,781,249)**
**A/E Agreement with Long and Associates ($2,059,250)**

- **Budget** : $46,204,358
  - As of 9/1/24 Expended $28,590,914
  - As of 9/1/24 Sales Tax Savings $268,140
- **Funding Source:** COPS and Impact Fees
- **Schedule**
  - Project Design Start: July 2022
  - Construction Start: June 2023
  - As of 9/1/24 - 82% Complete
  - Substantial Completion Buildings 1 – 8: August 2024
  - Locker Room Renovation: Summer 2025
  - Project On Schedule
- **Scope of Work**:
  - New Building 8: Ten Classroom Addition; Complete renovation of existing HVAC, Plumbing, Electric, Technology, Building Envelope, & Interior Finishes
  - Current Status: Completing Punch List
- **Project Director**: Jeffery Medwetz


Campus Aerial View – New Building 8 at Lower Left



# Construction Update

**ONECO ELEMENTARY SCHOOL**

**CM Agreement with Charles Perry Partners, Inc. ($34,737,302)**
**A/E Agreement with Zyscovich Architects ($1,678,768)**

- **Budget** : $39,514,846
  - As of 9/1/24 Expended $11,308,062
  - As of 9/1/24 Sales Tax Savings $294,142.98
- **Funding Source:** COPS
- **Schedule**
  - Project Design Start: August 2022
  - Construction Start: September 2023
  - As of 9/1/24 - 16% Complete
  - Substantial Completion: Phased; final completion April 2026
  - Project On Schedule
- **Scope of Work**:
  - New Building 1: Media and Admin; Complete renovation of existing HVAC, Plumbing, Electric, Technology, & Building Envelope systems; Improve on-site traffic queuing
  - Current Status: New Building 1 under construction; Existing Buildings 3 & 6 under renovation
- **Project Director**: Jeffery Medwetz



Campus Aerial View – New Building 1 at Lower Left




ZYSCOVICH ARCHITECTS
WE MAKE PEOPLE PLACES

CPPI
CHARLES PERRY PARTNERS, INC

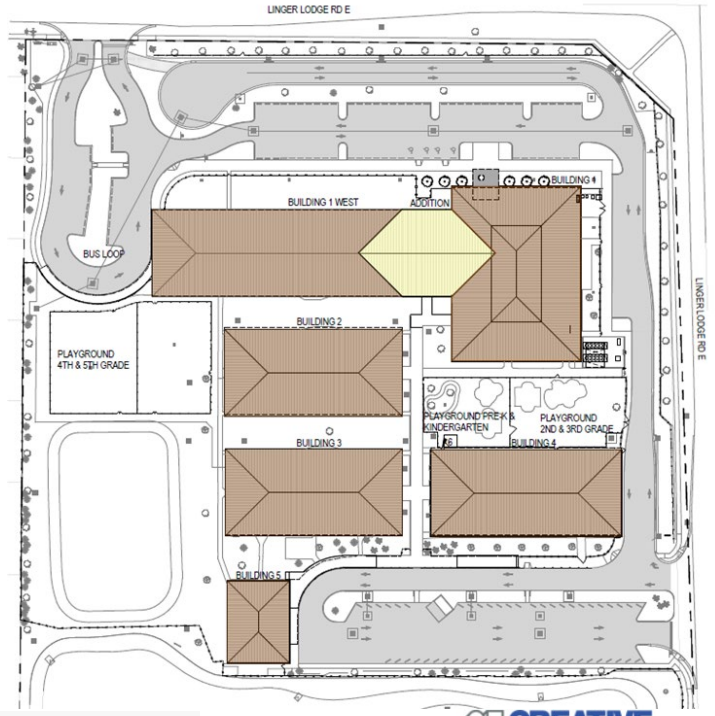
# Construction Update

**TARA ELEMENTARY SCHOOL**

**CM Amendment 5, Guaranteed Max Price with Creative Contractors, Inc. ($31,402,356.60)**
**A/E Amendment 2, with Sweet Sparkman Architects, Inc. ($2,154,751.00)**






- **Budget** : $35,259,423.00
  - As of 9/1/24 Expended $13,987,209
  - As of 9/1/24 Sales Tax Savings $286,415
- **Funding Source:** COPS
- **Schedule**:
  - Project Design Start: July 2022
  - Construction Start: June 2023
  - Substantial Completion: August 2025
  - 40% Complete
  - Project Phase 3 delayed, Remaining Phases On Schedule
- **Scope of Work**:
  - DOE Castaldi Analysis – Renovation Only Approved
  - Campus-wide renovation and required site improvements with Four (4) Classroom building addition, including roof replacement, security upgrade, and removal of portables
  - Building 1 Renovation: 90% complete and occupied
  - Building 2 Renovation: Selective demolition in progress
- **Project Director** – Michelle Begué

SWEETSPARKMAN ARCHITECTURE & INTERIORS

CREATIVE CONTRACTORS CREATING SOMETHING GREATER

# New School Update: East County K-8

# Construction Update

**East County K-8**

**CM Amendment 2, Guaranteed Maximum Price, with NDC Construction ($95,469,397.68)**

**A/E Agreement with HKS Architects, Inc. ($4,598,600.00)**



- **Budget** : $106,000,000.00
  - As of 9/1/24 Expended $6,143,150
  - As of 9/1/24 Sales Tax Savings $54,907
- **Funding Source:** COPS
- **Schedule**:
  - Project Design Start: August 2023
  - Construction Start: March 2024
  - Substantial Completion Elementary School: July 2025
  - 13% Elementary Complete
  - Substantial Completion Middle School: March/April 2026
  - 6% Total Project Complete
  - Project On Schedule







- **Scope of Work**:
  - Two Story prototype new construction for 1,620 student stations, grades K-8
  - Building 1 Admin/Media: tie beams complete, steel in progress
  - Building 2 Elementary: Hollow Core roof panels in progress
  - Building 4 Gym & Building 5 Food Service foundations in progress
- **Project Director**: Reginald Goff / Michelle Begué

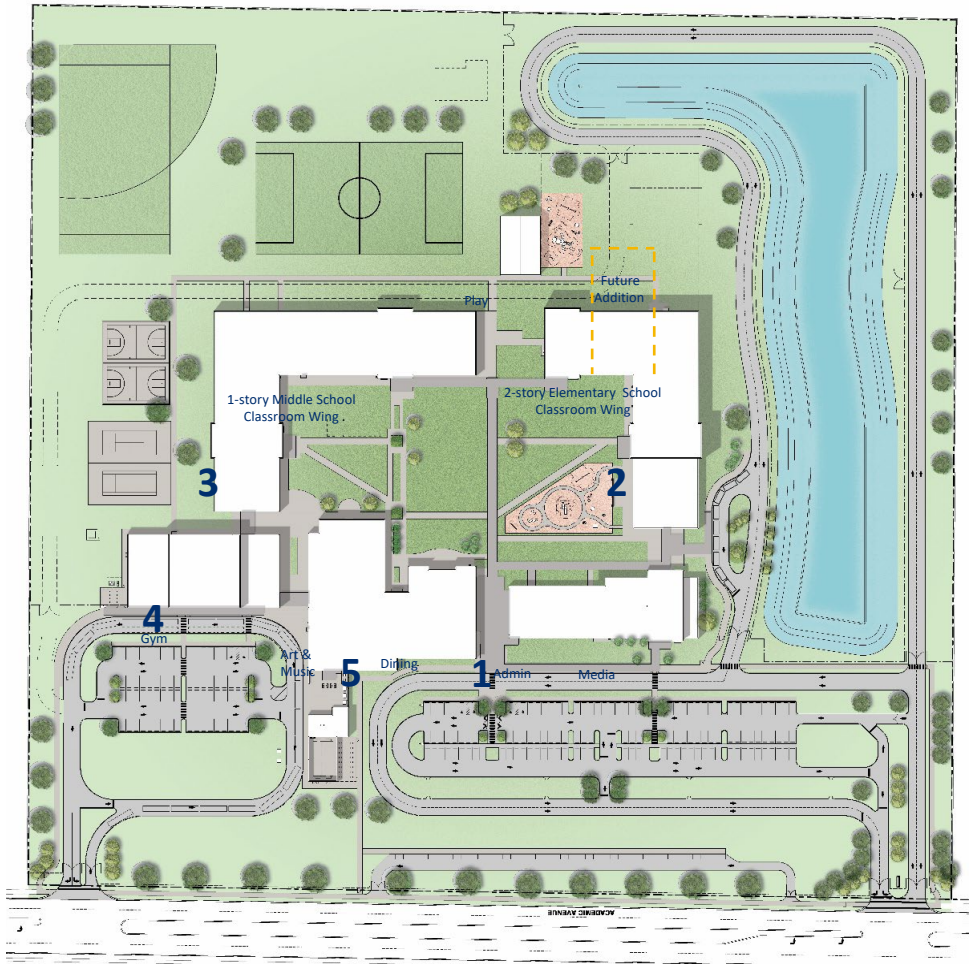
# Construction Update

East County K-8

**Concept**: Courtyard with secure perimeter for single point of access control

**Site Circulation:** Dedicated car loop, bus loop, and Pre-K loop

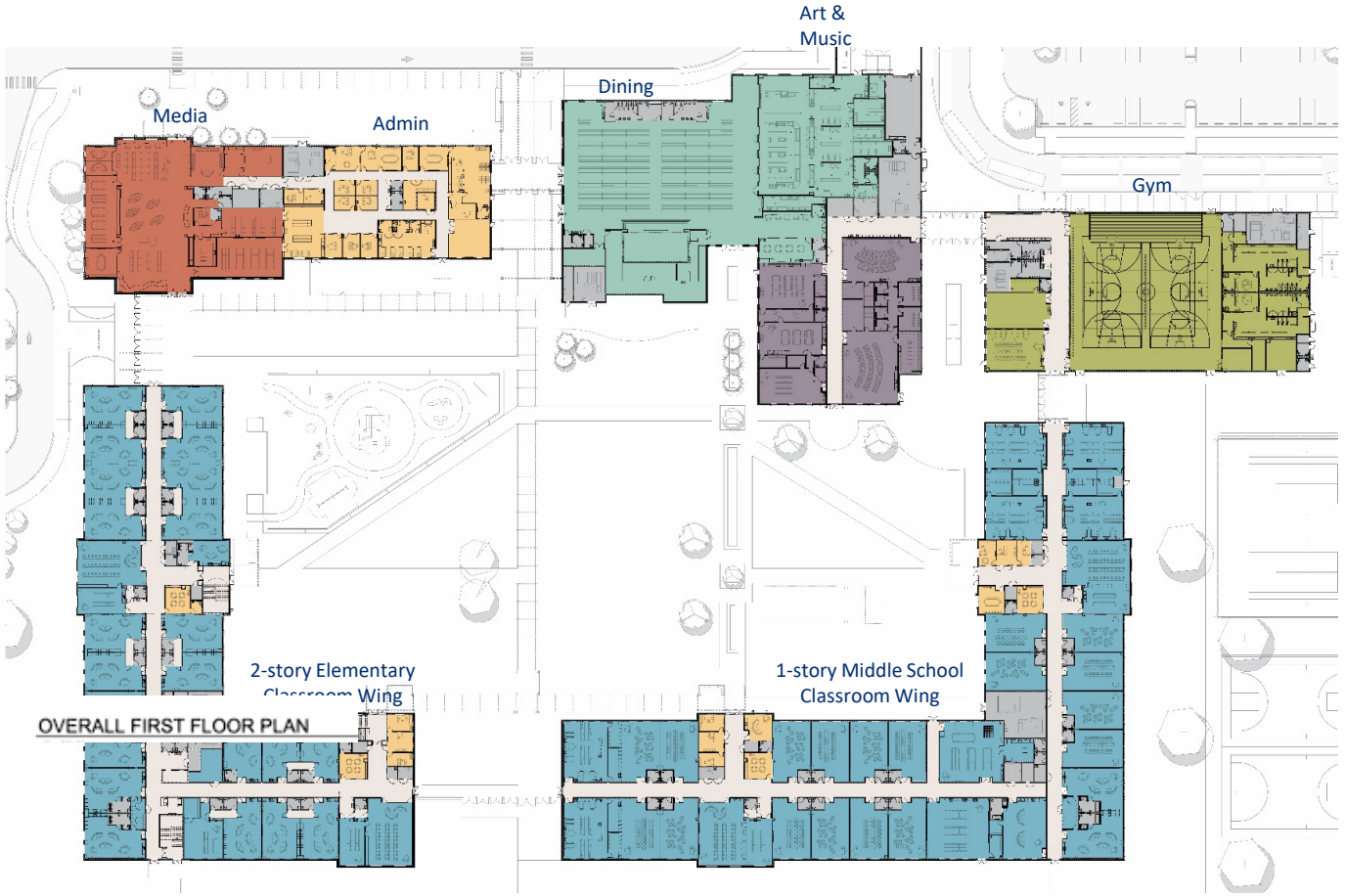
**Size:** Site and Buildings have been designed to anticipate future expansion



# Construction Update

East County K-8



# Getting Ready to Learn at East County K-8

## Executive Principal Todd Richardson

# East County K-8

- Serving East County Families
- The first new construction K-8 in Manatee County
- Seamless articulation from elementary to middle school
- Supportive Community
  - Families
  - Relationships
  - Community Partnerships



# East County K-8

- Leadership Opportunities for Elementary and Secondary Students
  - Franklin-Covey “Leader in Me”
  - Learning Neighborhoods



# East County K-8 Opening Plan

# East K-8 Opening Plan

- School opens August 2025 for students in grades K-5
- No residential attendance zone for 2025-26
  - Due to new elementary schools opening in 2026-27, it will be necessary to adjust boundaries during calendar year 2025. Creating an attendance zone for East K-8 now would result in some families moving schools twice.
  - Goal is to open with limited enrollment to accommodate ongoing construction on campus and save capacity for continued growth
  - Priority need is for relief of Gullett Elementary attendance zone
- School expands August 2026 for students in grades K-8
  - Establish attendance zone during calendar year 2025 to take effect in 2026-27 along with new attendance zones for new elementary schools

# East K-8 Opening Plan
# Student Recruitment

To accomplish a limited opening for the 2025-26 school year, offer "founding family" seats to students residing within the Gullett attendance area who are also in geographic proximity to the East K-8 site.

- Identify families who currently attend Gullett, or who are eligible to attend Gullett but were reassigned to Freedom/McNeal/Braden River for 2024-25, and who live in geographic proximity.
- Invite these families to attend an information meeting in October 2024, hosted by Executive Principal Richardson and Director Clark.
- Accept requests from identified families for reassignment (without transportation) pursuant to Superintendent authority in Policy 5120.
- Any remaining seats, if available, will be allocated for hardship application.

# Initial Recruitment For Voluntary Reassignment

Pending final enrollment analysis, the initial recruitment of families for voluntary reassignment for 2025-26 is projected to take place entirely within the Gullett attendance area as follows:

- South of 64
- East of Lorraine
- West of Bourneside
- North of 44th Ave between Lorraine and Uihlein Rd
- South of 44th Ave to South of Rangeland Pkwy between Uihlein Rd and Bourneside



# New School Update: North County School

# Construction Update

NORTH COUNTY SCHOOL

**CM Agreement with Willis Smith Construction, Inc. ($62,392,718.23.00)**
**A/E Agreement with Harvard Jolly, Inc. ($3,127,162.00)**




- **Budget** : $75,000,000.00
  - As of 9/1/24 Expended $ $16,119,134
  - As of 9/1/24 Sales Tax Savings $164,773
- **Funding Source:** COPS
- **Schedule**:
  - Project Design Start: August 2022
  - Construction Start: March 2024
  - Substantial Completion: July 2025
  - 25% Complete
  - Project On Schedule







- **Scope of Work**:
  - Two Story prototype new construction for 1,268 student stations, grades 4-8
  - Classroom Building E hollow core roof in progress
  - Classroom Building D & Food Service Building masonry walls in progress
  - Gymnasium Building C tie beams in progress
- **Project Director**: Reginald Goff / Michelle Begué

# Construction Update

## NORTH COUNTY SCHOOL

1. CLASSROOM BUILDING
2. CHILLER YARD/ MOWER STORAGE BUILDING
3. PEMB COVERED PLAY AREA
4. BUS LOOP QUEUING DROP-OFF/ PICK UP
5. CAR LINE QUEUING DROP-OFF/ PICK UP
6. MONUMENT SIGN
7. DUMPSTER ENCLOSURE AREA
8. BICYCLE STORAGE AREA
9. FUTURE PORTABLE CLASSROOM BUILDING
10. FUTURE BUILDING EXPANSION LOCATION
11. FIRE LANE - STABILIZED SURFACE
12. EMERGENCY VEHICLE TURN AROUND AREA
13. RETENTION POND AREA
14. FLAGPOLE
15. BASKETBALL COURTS
16. PLAY FIELD



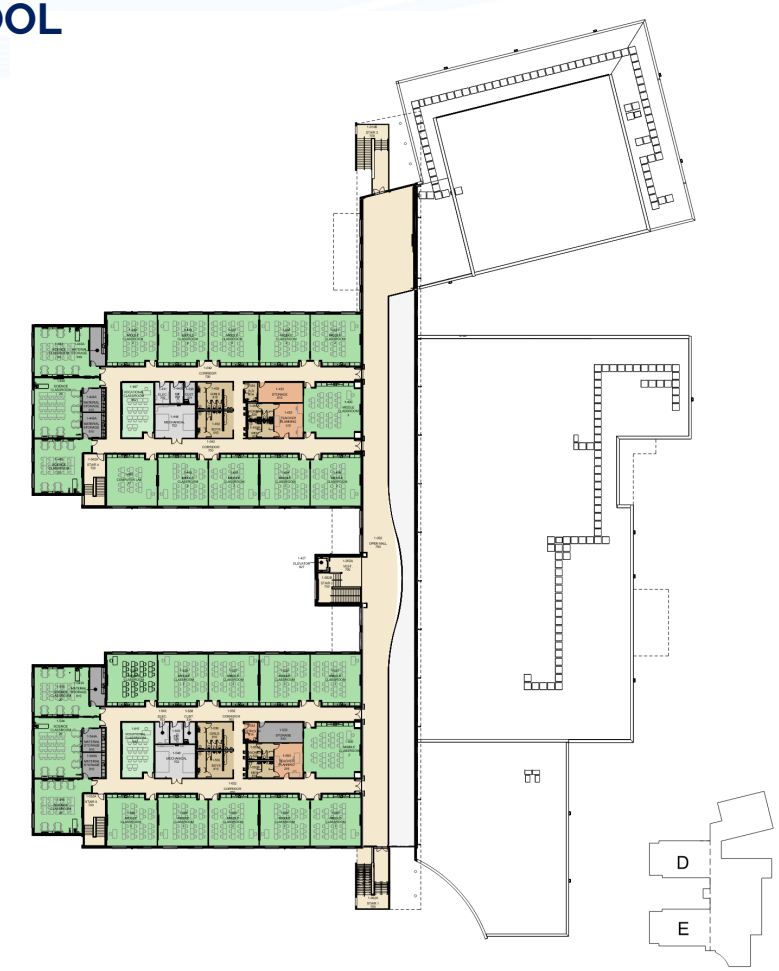

HARVARD • JOLLY | PBK  WILLIS SMITH CONSTRUCTION

# Construction Update

## NORTH COUNTY SCHOOL

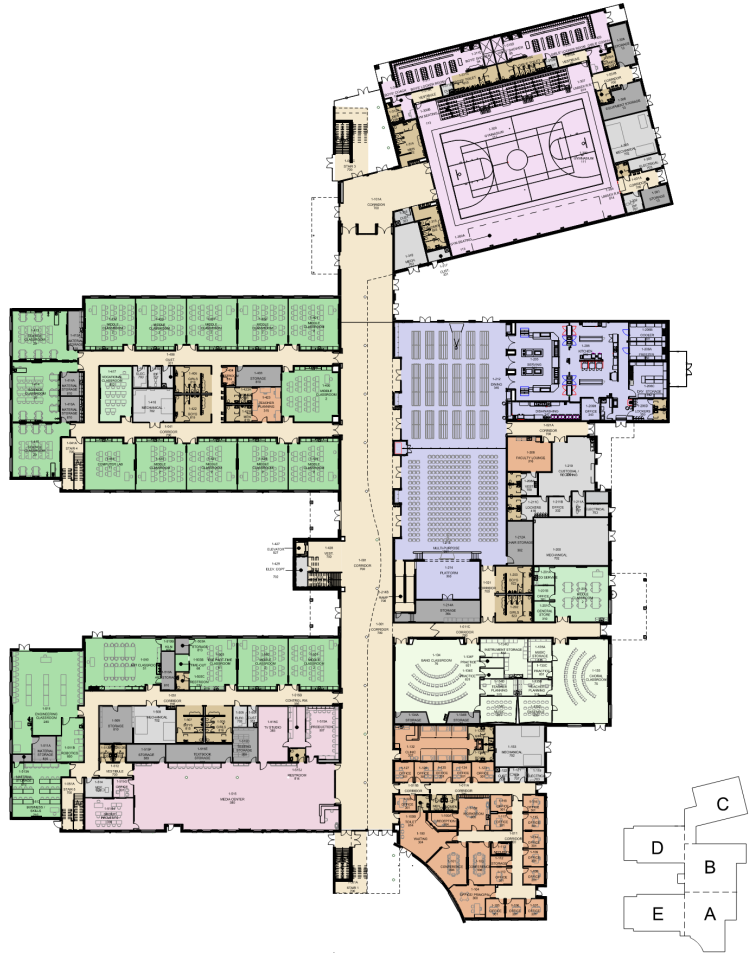
DEPARTMENT LEGEND

- ADMINISTRATION
- BUILDING SUPPORT
- CIRCULATION
- CLASSROOMS
- FOOD SERVICE
- MECH / CUSTODIAL
- MECHANICAL
- MEDIA
- MUSIC
- PHYSICAL EDUCATION
- RESTROOM
- STORAGE
- VOCATIONAL




OVERALL SECOND FLOOR PLAN
1" = 30'-0"

KEY PLAN




OVERALL FIRST FLOOR PLAN
1" = 30'-0"

KEY PLAN

HARVARD • JOLLY | PBK

WILLIS SMITH CONSTRUCTION

# Getting Ready to Learn at North County School

## Executive Principal Dr. Hayley Rio

# Harvey: One School, Two Campuses

- Primary Campus: Pre-K to 3rd Grade
- Upper Campus: 4th to 8th Grade

- Extending the Harvey Elementary values of Family, Memories, and Passion through 8th grade

- Seamless articulation from elementary to middle school



# Harvey: One School, Two Campuses

## Traditions Continue:

- Educating the Full Child
- House System
- Immersive Learning Transformations
- Same Logo and Colors











# Harvey: One School, Two Campuses

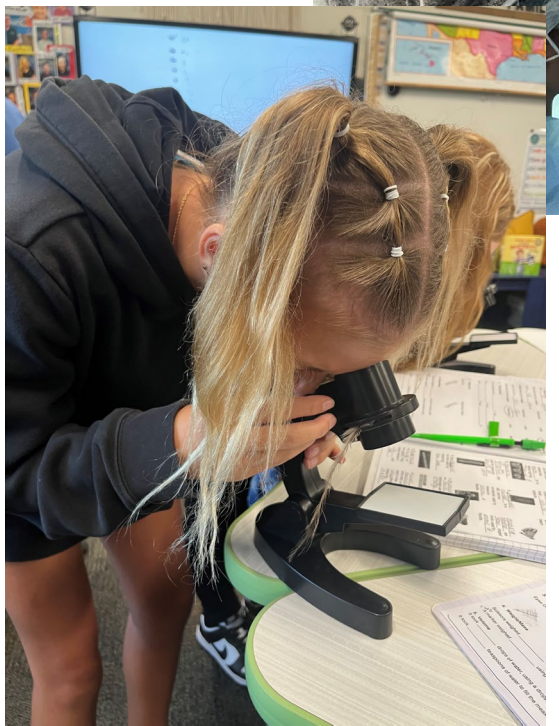
## Traditions Continue:

- Educating the Full Child
- House System
- Immersive Learning Transformations
- Same Logo and Colors

## New Opportunities:

- Medical Academy
- Harkness Pedagogy
  - Student-led discussion-based learning





# North County School Opening Plan

# North County School Opening Plan

- School opens August 2025 for students in grades 4, 5, and 6
- No residential attendance zone for 2025-26
  - Due to new elementary schools opening in 2026-27, it will be necessary to adjust boundaries during calendar year 2025. Creating an attendance zone for North County School now would result in some families moving schools twice.
  - Goal is to open with limited enrollment to save capacity for hyper growth in this area and to build the student support systems necessary to operate a grades 4-8 campus.
  - Priority need is for relief of Harvey Elementary attendance zone
  - Secondary need is for limited relief of Buffalo Creek attendance zone
- School expands August 2026 for students in grade 7; grade 8 to open August 2026 or 2027
  - Establish attendance zone during calendar year 2025 to take effect in 2026-27 along with new attendance zones for new elementary schools

# North County School Opening Plan Grades 4 & 5

- Current students in grade 3 at Harvey Elementary will move to Grade 4 at North County
- Current students in grade 4 at Harvey Elementary will move to Grade 5 at North County
- Current grades 3 and 4 students who were reassigned from Harvey to Mills for 2024-25 have the option to join the next grade level at North County or remain at Mills (no transportation) for 2025-26
- A current grade 3 or 4 Harvey Elementary student who does not wish to move to North County may request reassignment to Mills (no transportation) for 2025-26 or apply for another school choice option for 2025-26.

# North County School Opening Plan Grade 6

- To accomplish a limited opening for the 2025-26 school year, a select number of students in grade 5 at Harvey Elementary may enter Grade 6 at North County, including any students in grade 5 who were reassigned from Harvey to Mills for 2024-25.
- Anticipated Process
  - Invite these families to attend an information meeting in October 2024, hosted by Executive Principal Rio and Director Clark.
  - Families who wish to be considered for this option will apply for reassignment.
  - Office of Student Assignment will disseminate offers to selected families. Selection criteria will include, but is not limited to, geographic proximity to North County campus, sibling(s) in rising grades 4 or 5 attending North County School. Remaining seats, if any, will be allocated via random selection.
  - Any remaining seats, if available, after random selection will be allocated for hardship application.

# North County School
# Other Considerations

- Transportation will be provided to eligible students. Those eligible will be transported through either dedicated routes to the North County School or through shuttle service between Primary and Upper Campus.

- North County School is anticipated to have a unique start and dismissal time to accommodate shuttle service and vehicle traffic between campuses.

- School Board to identify name of school facility (Policy 7250).

# New Schools 2025-26: Next Steps

- September 24, 2024:  Board item to proceed with opening plan
- October/November 2024:  Family engagement and assignment
  - Goal is to complete this process prior to opening of district choice window
- January 2025:  Begin staffing of new schools
- August 2025:  Schools open

# Update on Enrollment and Future Schools

## School Board Workshop
## September 13, 2024

**AGENDA ITEM NO. IV.4**

**School Board of Manatee County**
**September 13, 2024 - Workshop**
Action Item

**Title**
Discussion Regarding School Board Policies, to Include New Policies

**Executive Summary**
At the July 27, 2024 School Board Meeting, the Board approved the advertisement and set a public hearing for amendment of the following Policies:

- Policy 6110
- Policy Series 5120

The purpose of the discussion is to update the following School Board policies to conform to current legislation and statutes.

**This item aligns with the District's Strategic Plan Goal(s) which state(s):**

**Ready To Grow | Goal 7**
Promote our schools and District as remaining highly competitive and uniquely designed to produce top-notch graduates, great neighbors, and responsible citizens

**Recommendation**
.

**Financial Impact**
No Financial Impact

**Contact**
**Submitting Department:** Administration
**Initiated By:** Kevin Chapman

Attachments:
Part Four Policies - 5120 Series
Policy_6110

## Part Four

**Policy 5120 – Assignment Within District (Revised)**
SDMC revisions to this policy

**Policy 5120.01 – Designated Residential Attendance Zones (New)**
New policy for SDMC

**Policy 5120.02 – Rezoning of Designated Residential Attendance Zones (New)**
New policy for SDMC

**Policy 5120.03 – School Choice Program (New)**
New policy for SDMC

5120 - ~~ASSIGNMENT WITHIN DISTRICT~~ Student Enrollment

~~The School Board authorizes the Superintendent to recommend residential attendance zones for each school, subject to the review and approval of the Board.~~ All students shall attend the school serving the student's residential attendance zone, except as authorized by the school choice program or otherwise provided by Board rule.

A student's residential attendance zone is determined by the location of the residence of his/her enrolling parent as defined by Board policy.

~~Procedures~~

I. **Requirements for Student Enrollment In the School District**

A. Principal's Responsibility for Student Enrollment

1. Principals shall ensure that student enrollment procedures are posted on school based websites.

2. At the direction of the Superintendent, the principal or head of each enrollment site shall require evidence of the documentation needed for enrollment.

3. The Principal or head of each enrollment site shall ensure that accurate student data is entered in the electronic student data system upon enrollment.

B. Parent's Responsibility for Student Enrollment

All students entering a Florida school for the first time must present the following items.

1. Birth certificate or other proof of date of birth. Student must be five (5) years old on or before September 1st to attend kindergarten, six (6) years old on or before September 1st to attend first grade. However, if student is transferring from out-of-state, the conditions listed in Students Transferring from Out-of-State below apply. Date of birth may be verified by:

   a. original or certified copy of a State birth certificate

   b. baptismal certificate showing date of birth and place of baptism, with shown affidavit

   c. insurance policy on child in force at least two (2) years

   d. bible record of child's birth with parental sworn statement

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e. passport or certificate of arrival in United States showing age of child

f. school record at least four (4) years prior, showing date of birth

g. parent's sworn affidavit, with certificate of examination showing the child's age from a health officer or physician

The certificate must include the health officer or physician's name, address, and phone number.

2. Proof of residency: This is used to determine the assigned school. Acceptable forms of residency include:

a. current electric or water bill

The bill must show address and name of parent/guardian.

b. current lease agreement with parent/guardian's name

c. official letter from company providing housing with parent/guardian's name

d. Migrant Certificate of Eligibility

e. school choice letter

If parent cannot provide the above requirements, they parent must ~~visit the Parent Information Center~~contact the school district for verification of address. Parent must bring a notarized statement from the owner/lessee of the home where ~~they~~ the parent and student are living, stating the names of all people residing at the address. In addition, parent must bring a current utility bill (power or water) with the owner/lessee's name and address.

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Falsification of addresses can make a student ineligible for high school athletics for one (1) calendar year.

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3. Florida Certificate of Immunization

All new students entering the District must have a completed Florida Certificate of Immunization.

4. Physical examination

An examination paper must be signed by a licensed examiner and must have been issued within twelve (12) months prior to enrollment. Physical must be a head-to-

toe exam. Out-of-state physicals are acceptable provided they meet Florida exam requirements.

5. Social Security Number

   Parents are asked, but not required, to provide a Social Security number.

6. Most recent report card

   Parents are asked, but not required, to provide the latest report card with address and phone number of previous school for students entering grades 1-12.

7. Special Education Records

   Copies of any special education records such as Individual Education Plan (IEP) will assist with placement of students in the appropriate classes. Although this is strongly urged, it is not a requirement for admission.

8. Legal guardianship papers if applicable.

**II. Use of Guardianship Affidavit**

A. When a student's parent or legal guardian resides outside of Manatee County, temporary guardianship may be granted to a Manatee County resident for school enrollment purposes. However, both the parent and temporary guardian must complete a guardianship affidavit and evidence of parent address prior to the student's enrollment in the School District. The school assignment will be based on the verified address of the temporary guardian.

B. A student whose parent/guardian resides in Manatee County may be assigned to a school based on the residence of a temporary guardian only when verification of the need for same is provided by a local agency such as the Department of Children and Family Services. Lacking any such verification, all students will be assigned to school based on the residence of their parent/legal guardian, unless written approval to the contrary is approved through the Office of Student

**III. Demographics, Projections, and Assignment following review and approval of District Administrative Appeals Committee.**

**Students Transferring from Out-of-State**

A. Any student who transfers from an out-of-state public or nonpublic school and who meets the regular age requirements for admission to Florida public schools shall provide the documentation listed in Parent's Responsibility for Student Enrollment above prior to admission. In determining the students'

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placement:

1. The District will consider the students' last successful grade of completion as evidenced in the students' school records.

2. In the absence of school records, the student will be tested and placed according to Policy 5410, *Student Progression*.

B. Any student who transfers from an out-of-state public school and who does not meet regular age requirements for admission to Florida public schools shall provide the following prior to admission:

1. Official documentation that the parent(s) or guardian(s) was a legal resident(s) of the state in which the student was previously enrolled in school.

2. Acceptable documentation is as follows:

a. Deed, listing homeownership in that state.

b. Lease or rental agreement.

c. Electric or water bill.

d. Tax return for the most recent tax year.

Supporting documentation, must list the name and former address of the parent(s) or guardian(s) in that state.

e. An official letter or transcript from proper school authority which shows record of attendance of a minimum of one (1) week in Kindergarten or First Grade, academic information, and grade placement of the student.

f. Florida Certificate of Immunization.

3. Evidence of Date of Birth as provided in Parent's Responsibility for Student Enrollment of this policy.

4. Physical examination. An examination paper must be signed by a licensed examiner and must have been issued within twelve (12) months prior to enrollment. Physical must be a head-to-toe exam. Out-of-state physicals are acceptable provided they meet Florida exam requirements.

C. Any student who transfers from an out-of-state nonpublic school and who does not meet regular age requirements for admission to Florida public schools shall be admitted if the student meets age requirements for public

school within the state from which s/he is transferring and if the transfer of the student's academic credit is acceptable under the rules provided in section 4.9, Student Progression, of the policies and procedures of the Board. Prior to admission, the parent or guardian must provide the documentation required in Item B of this section above.

## IV. District Child Study Team

As part of the District student assignment process, at-risk students may be referred by the principal to the Office of Dropout Prevention and Alternative Education for consideration for additional support services and strategies at the school level or for alternative placement. This referral may be made for students with extreme behavioral or attendance and tardiness issues. The District Dropout Prevention Specialist may refer the request to the District Child Study Team.

However, any such referral must be supported by extensive evidence of a review by the school child study team, including parental involvement, and implementation of resulting recommended strategies. All ESE student referrals shall be subject to applicable law. The District team shall consider all learning issues, including the best interest of the referred student, as well as the best interest of other students and staff of the referring school in resolving student issues.

## V. Class Size Assignments

A. In compliance with F.S. Sect. 1003.03 which requires all districts to adhere to class size maximums a student may be assigned from the zoned school to another District school /alternate school) at date of enrollment due to a grade level reaching maximum class size capacity.

B. When a school reaches maximum class size capacity in one or more grade levels the following procedures will apply to new enrollments:

1. Students in the same family will be assigned to the same alternate school. The parent/guardian may choose to enroll student/sl in open grade levels at the zone school and have only the student(s)ł in the closed grade/sł assigned to an alternate school.

2. Students assigned to an alternate school due to class size are assigned to the school for the remainder of the school year.

3. Transportation is provided to students living more than two (2) miles from the assigned school.

4. Students who have been placed by a class size assignment have a priority for enrollment at the zone school for the following school year.

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5. The parent/guardian of student(s) may choose to remain at the alternate school to the highest grade available at that school. No transportation is provided after the first year.

6. ~~i~~Incoming siblings will be permitted to attend the same class size assignment school as a student who remained at an alternate school.

## VI Student Assignment to School or Program

The Superintendent or designee is authorized to assign a student to any program or school as deemed to be in the best interest of the student or School District.

**5120.01 - Designated Residential Attendance Zones~~Areas~~**

~~A.~~ The School Board authorizes the Superintendent to recommend residential attendance zones for each school, subject to the review and approval of the Board.~~The Superintendent shall recommend designated attendance areas for schools as appropriate.~~

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~~B.~~ Any student residing in a designated attendance area of a school shall be assigned to attend that school.

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~~C.~~ The adopted designated attendance areas are incorporated herein as a part of this rule.

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~~D.~~ Information pertaining to the designated attendance areas is available at the Office of Student Demographics, Projections, and Assignment or through a variety of media including the District's website, www.manateeschools.net by clicking departments and then clicking on the Office of Student Demographics, Projections, and Assignment.

~~E.~~ In creating or modifying school attendance areas, the District shall maximize efforts to create and maintain diversity in enrollment as provided for in the District's Voluntary Desegregation Plan.

~~F.~~ If a child has been enrolled at the wrong District school as a result of either school error or inaccurate information provided by the parent, the principal shall notify both the parent and the ~~Office of Student Demographics, Projections, and~~appropriate school district department~~Assignment~~ of this error. ~~The parent shall be directed to apply to the District Parent Information Center for verification of the appropriate school of assignment.~~

~~G.~~ If a parent refuses to remove a child from attendance at the wrong school, the principal of that school shall request that the ~~Office of Student Demographics, Projections, and Assignments~~school district remove the student from the school's attendance roster and assign the student to the appropriate school. The ~~Office of Student Demographics, Projections, and Assignments~~school district shall notify the parents in

writing of the assignment to the appropriate school. Refusal to attend the assigned school shall constitute violation of the compulsory school attendance law.

**Student Assignment to School or Program**

The Superintendent or designee is authorized to assign a student to any program or school as deemed to be in the best interest of the student or School District.

**5120.02 - ~~Changes to Designated Attendance Areas~~Rezoning of Designated Residential Attendance Zones**

~~When the Superintendent intends to recommend changes to designated attendance areas, the procedures outlined below shall be followed and a notice of intent to develop a rule will be advertised to the public.~~

~~A. Redistricting may occur when a school opens or closes.~~

~~1. Forming the Redistricting Committee~~

~~a. Each school potentially affected is identified and the principal of each of these schools will appoint three (3) staff members, three (3) parents, and one (1) administrator to serve as the school's representatives on the redistricting committee.~~

~~b. The principal of each feeder school potentially affected will be asked to identify one (1) staff member, one (1) parent, and one (1) administrator to serve as representatives on the redistricting committee.~~

~~c. Each committee will also include representatives of School Support Services; the Student Demographics, Projections, and Assignment Office; and the Transportation Department as appointed by the Superintendent or designee.~~

~~2. Redistricting Committee Meetings~~

~~a. An organizational meeting will be scheduled and the Superintendent will provide materials to committee members and an explanation of the factors and parameters to be considered in drawing designated attendance areas for each school. These include:~~

~~1. data indicating the number of students living in each designated area and the actual number of children attending each school categorized by minority percentage and by the race neutral factors used in the Voluntary Desegregation Plan~~

~~The race neutral factors are socio-economic status (SES), Limited English Proficient (LEP), Exceptional Student Education (ESE) gifted, and ESE non-gifted.~~

~~2. maps reflecting the geographical area and location of students within each attendance area~~

~~3. factors and parameters:~~

a. capacity of each school facility

b. natural boundaries such as rivers, highways, railroads

c. distance students must travel to and from school

d. socio-economic composition of schools impacted by boundary changes

e. all race neutral factors as they reflect the District wide demographics

b. The committee will be divided into three (3) sub-committees (A, B, and C) with representation from each participating school to serve on each sub-committee. Each sub-committee will be charged with drawing designated attendance areas for each affected school for consideration by the Superintendent.

c. Each sub-committee will identify a chairperson and schedule all meetings of the sub-committee as needed to complete drawing designated attendance areas. Each sub-committee will include a District staff person to serve as meeting coordinator and also as an information resource.

d. Each sub-committee will reconvene with the Superintendent to review the pros and cons of each option developed.

3. Board Workshop on Redistricting

a. Each sub-committee will present its recommendation (Plan A, B, or C) to the Board at a workshop session.

b. Committee representatives will then be charged with presenting plans A, B, and C to their individual school communities for input and feedback at their SAC/PTO meetings.

4. Advertising & Setting a Public Hearing

The Board will authorize advertising of its intent to adopt a rule and set a public hearing and special Board meeting to consider adopting a redistricting plan.

5. Public Hearing/Special Board Meeting

a. The Superintendent will recommend a redistricting plan, which may be plan A, B, or C, or a variation thereof.

b. Public comment will be heard.

c. The Board will take action on the Superintendent's recommendation.

B. Realignment may occur when any school facility becomes over or under utilized, or when deemed appropriate by the Superintendent.

1. Forming the Realignment Committee

a. The schools potentially affected are identified and the principal of each of these schools will appoint three (3) staff members, three (3) parents, and one (1) administrator to serve as the school's representatives on the realignment committee.

b. The principal of each feeder school potentially affected will be asked to identify one (1) staff member, one (1) parent, and one (1) administrator to serve as representatives on the realignment committee.

c. The committee will also include representatives of School Support Services; the Student Demographics, Projections, and Assignment Office; and the Transportation Department as appointed by the Superintendent or designee.

2. Realignment Committee Meetings

a. An organizational meeting will be scheduled and the Superintendent will provide materials to committee members and an explanation of the factors and parameters to be considered in modifying designated attendance areas. These include:

1. data indicating the number of students living in each designated area and the actual number of children attending each school categorized by minority percentage and by the race neutral factors used in the Voluntary Desegregation Plan

   The race neutral factors are SES, LEP, ESE gifted, and ESE non-gifted.

2. maps reflecting the geographical area and location of students within each attendance area

3. factors and parameters:

   a. capacity of each school facility

   b. natural boundaries such as rivers, highways, railroads

   c. distance students must travel to and from school

d. socio-economic composition of schools impacted by boundary changes

e. all race neutral factors as they reflect the District wide demographics

b. The committee will be charged with recommending designated attendance areas for consideration by the Superintendent.

c. The committee will identify a chairperson and schedule all meetings of the committee as needed to draw the recommended designated attendance areas. The committee will include a District staff person to serve as meeting coordinator and also as an information resource.

d. The committee will reconvene with the Superintendent to review the pros and cons of the option developed.

3. Board Workshop on Realignment

a. The committee will present its recommendation to the Board at a workshop session.

b. Committee representatives will then be charged with presenting the plan to their individual school communities for input and feedback at their SAC/PTO meetings.

4. Advertising & Setting a Public Hearing

The Board will authorize advertising of its intent to adopt a rule and set a public hearing and special board meeting to consider adopting a redistricting plan.

5. Public Hearing/Special Board Meeting

a. The Superintendent will recommend a realignment plan which may be the committee's plan or a variation thereof.

b. Public comment will be heard.

c. The Board will take action on the Superintendent's recommendation.

C. Adjustment may occur when a geographic area is identified that has no immediate impact on a school or facility but by adjustment will more clearly define the intent of an existing boundary, or, when the future of a geographic area will more closely align the District with the intent of the Voluntary Desegregation Plan, or, when the geographic area will better utilize existing facilities in the future.

1. Forming the Adjustment Committee

a. The schools potentially affected are identified and the principal of each of these schools will appoint a staff member, a parent, and an administrator to serve as the school's representatives on the adjustment committee.

b. The principal of each feeder school potentially affected will be asked to identify one (1) staff member, one (1) parent, and one (1) administrator to serve as representatives on the adjustment committee.

c. The committee will also include representatives of School Support Services; the Student Demographics, Projections, and Assignment Office; and the Transportation Department as appointed by the Superintendent or designee.

2. Adjustment Committee Meetings

a. An organizational meeting will be scheduled and the Superintendent will provide materials to committee members and an explanation of the factors and parameters to be considered in adjusting designated attendance areas. These include:

1. data indicating the number of students living in each designated area and the actual number of children attending each school categorized by minority percentage and by the race neutral factors used in the Voluntary Desegregation Plan

   The race neutral factors are SES, LEP, ESE gifted, and ESE non-gifted.

2. maps reflecting the geographical area and location of students within each attendance area

3. factors and parameters:

   a. capacity of each school facility

   b. natural boundaries such as rivers, highways, railroads

   c. distance students must travel to and from school

   d. socio-economic composition of schools impacted by boundary changes

   e. all race neutral factors as they reflect the District wide demographics

b. The committee will be charged with recommending adjustments to designated attendance areas for consideration by the Superintendent.

c. The committee will identify a chairperson and schedule all meetings of the committee as needed to complete the recommended adjustments to designated attendance areas. The committee will include a District staff person to serve as meeting coordinator and also as an information resource.

d. The committee will reconvene with the Superintendent to review the pros and cons of the adjustment developed.

3. Board Workshop on Redistricting

a. The committee will present its recommendation to the Board at a workshop session.

b. Committee representatives will then be charged with presenting the plan to their individual school communities for input and feedback at their SAC/PTO meetings.

4. Advertising & Setting a Public Hearing

The Board will authorize advertising of its intent to adopt a rule and set a public hearing and special Board meeting to consider adopting a redistricting plan.

5. Public Hearing/Special Board Meeting

a. The Superintendent will recommend a redistricting plan which may be the committee's plan or a variation thereof. b. Public comment will be heard.

b. The Board will take action on the Superintendent's recommendation.

A. The Board agrees that it is in the best interest of the community that subdivisions and specific master-planned communities that are zoned for one particular school remain zoned for that specific school, in the event that the subdivision and specific masterplanned community is later expanded, parcels are acquired, and further homes added. This will ensure greater community and expectations of those living within the community. It is not the intention of this Board that this policy will apply to allow mergers of communities that were built separately and thereafter become merged and/or acquired by one of the subdivisions.

I. **Definitions**

A. FISH (Florida Inventory of School Houses) Capacity

Data, inventory, and numbering system used by the Florida Department of Education, Office of Educational Facilities for buildings, rooms, and occupancy levels in public educational facilities (hereinafter referred to as "FISH").

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B. Program Capacity

Actual capacity at a school adjusted by the Superintendent for factors (portables, VPK classrooms, ESE programs, Intensive Classes, Testing Labs, Computer Labs, etc.) not recognized or accounted for accurately by FISH. Program capacity includes FISH capacity modified by the Superintendent to account for class size, classroom program use, and scheduling.

## II. Initiation of revisions to Residential Attendance Zones

A. The Board may consider revisions for the following reasons:

1. Construction of a new school and/or the construction of additional capacity at an existing school.
2. Closing or suspending operations of an existing school.
3. Significant over-capacity or under-capacity of individual schools that cannot be resolved through other provisions of board policies.
4. An anticipated student population growth or decline.

B. The Superintendent shall periodically review student enrollment, facility utilization, and projected growth to ascertain the need for revisions to existing attendance zones and/or for the creation of residential attendance zones for new schools.

C. If the results of the periodic review indicate a need to revise and/or create residential attendance zones, the Superintendent may recommend that the School Board initiate the residential attendance zone revision process. The Superintendent's recommendation shall include a suggested timeline and communication plan consistent with other provisions in this policy.

## III. Implementation of revisions to Residential Attendance Zones

A. Upon the School Board's approval of the Superintendent's recommendation to initiate the residential attendance zone revision/creation process, the Superintendent shall hold an initial public meeting to explain the rezoning process, outline the criteria for establishing residential attendance zones, and to provide an opportunity for public input.

B. After considering the public's comments, the Superintendent shall prepare a minimum of three (3) rezoning plans to present at the second public meeting. The criteria used to prepare the proposals shall comply with the following criterion to the

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extent practicable:

1. The plan creates residential attendance zones that comply with all state and federal laws.

2. The plan keeps subdivisions and small neighborhood units in the same attendance zone to the extent practicable.

3. The plan assigns students to the closest school to the extent practicable.

4. The plan creates compact attendance zones to the extent practicable.

5. The plan includes target enrollments that allow for population/student growth and anticipated changing demographics.

6. The plan shall attempt to cause schools to be operated near or under program capacity, allowing for anticipated growth.

7. The plans shall, to the extent practicable, minimize the duration of travel time and distance in order to promote safety and reduce transportation costs. The plans shall, to the extent practicable, not place a transportation burden on any identifiable Federal subgroup.

8. To the extent practicable, the plans should take into consideration contiguous communities as defined by natural barriers, roads, railways, etc.

9. To the extent practicable, the plans shall attempt to avoid rezoning neighborhoods which have been rezoned within the prior three (3) year period. This applies only to rezoning of the same level (i.e., elementary, middle, high school).

C. At the second public meeting the Superintendent and/or designee shall present a minimum of three (3) rezoning alternatives for review and discussion, including the strengths and weaknesses of each plan. Appropriate time will be provided for questions and answers. At this meeting, the appropriate data relative to elements of subparagraph D shall be provided as part of the discussion of each alternative plan. Additionally, staff will establish a dedicated web presence for the rezoning and will display questions and answers reflective of the concerns of the public.

D. As soon as practical after the second public meeting the Superintendent shall review all comments made by the public and the Board, review all plans considered or submitted at the public meeting and either determine to recommend a plan for adoption by the Board and request permission to advertise the plan or re-submit revised plans for reconsideration and recommendation.

E. If the Superintendent recommends a rezoning plan to the Board and the Board approves, the Superintendent shall notice a specific plan for adoption pursuant to the requirements of F.S. 120. The Board may schedule a public hearing as permitted by

law.

F. Changes approved to school attendance zones during a current school year shall become effective beginning at the commencement of the following school year unless extenuating circumstances require the Board to implement rezoning changes prior to the following school year unless the Superintendent recommends an alternative effective date.

G. Exemptions:

1. No rising student in the final year of attendance at the highest grade level offered by the school will be required to change his/her school of attendance as a result of attendance zone revisions. No transportation is provided if a student remains at the current school of attendance based on this exemption.

2. Siblings of a rising rezoned student in the final year of attendance at the highest grade level offered by the school will be allowed to attend the same school to the extent practicable for one (1) year. No transportation is provided for this option unless otherwise provided herein.

3. Unless there are health and safety issues that would preclude compliance, no current elementary student will be required to shift to a different school if the area in which s/he resides has been previously rezoned during his/her attendance at that school. No transportation is provided if a student remains at the current school of attendance based on this exemption.

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~~E.~~ **IV. Administrative Rezoning**

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An administrative rezoning is a rezoning that affects a change in the current designated school of regular attendance for an area of land that has potential or has entitlements for future residential development. The rezoning may affect high schools, middle schools, or elementary schools, or any combination thereof. The Superintendent may propose an administrative rezone to the Board.

The following conditions are considered to be consistent with an administrative rezone:

1. An administrative rezoning is discretionary and should reflect a need to balance current or projected student enrollment among schools. or otherwise achieve the goals of the District.

2. The timing of the administrative rezoning can occur up to the issuance date of the first building permit for a new residential development.

3. Any proposed administrative rezoning shall ~~mustSlliil/l~~ be brought to the School Board for consideration of approval.

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## 5120.03 - School Choice Program

The District's school choice controlled open enrollment school program provides a public education delivery system that allows a parents' indicated preferential educational choice as a significant factor.

A. The school choice program provides an opportunity for all students in Manatee County to apply for assignment to any District school that is within the designated elementary cluster or middle school region of the student's zoned school as determined by the address of the student's enrolling parent. Approval of school choice applications will be determined according to criteria established in F.S. 1002.31.

B. The current capacity of each school is identified on the School District's website. The capacity incorporates the specifications, plans, elements, and commitments contained in the School District's educational facilities plan and the long-term work programs required under F.S. 1013.35.

C. Preferential treatment is provided in the school choice process to all of the following:

    1. Dependent children of active duty military personnel whose move resulted from military orders.

    2. Children who have been relocated due to a foster care placement in a different school zone.

    3. Children who move due to a court-ordered change in custody due to separation or divorce, or the serious illness or death of a custodial parent.

    4. Students residing in the School District.

D. Students residing in the District may not be displaced by a student from another district seeking enrollment under the controlled open enrollment process.

E. For purposes of continuity of educational choice, a student who transfers pursuant to this section may remain at the school chosen by the parent until the student completes the highest grade level at the school.

F. The Board shall adopt by rule and post on its website the process required to participate in controlled open enrollment. The process:

    1. adheres to Federal desegregation requirements;

    2. allows parents to declare school preferences, including placement of siblings within the same school;

3. provides a lottery procedure to determine student assignment and establish an appeals process for hardship cases;

4. affords parents of students in multiple session schools preferred access to controlled open enrollment;

5. maintains socioeconomic, demographic, and racial balance;

6. addresses the availability of transportation;

7. maintains existing academic eligibility criteria for public school choice programs pursuant to F.S. 1002.20(6)(a).

G. Identifies schools that have not reached capacity, as determined by the School District.

H. Ensures that the Board adopts a policy to provide preferential treatment pursuant to paragraph (2)(c).

I. In accordance with the reporting requirements of F.S. 1011.62, the Board shall annually report the number of students exercising public school choice, by type, in accordance with rules adopted by the State Board of Education.

J. For a school or program that is a public school of choice under this section, the calculation for compliance with maximum class size pursuant to F.S. 1003.03(4) is the average number of students at the school level.

K. The School District shall not delay eligibility or otherwise prevent a student participating in controlled open enrollment or a choice program from being immediately eligible to participate in interscholastic and intrascholastic extra-curricular activities.

A student may not participate in a sport if the student participated in that same sport at another school during that school year, unless the student meets one (1) of the following criteria:

1. Dependent children of active duty military personnel whose move resulted from military orders.

2. Children who have been relocated due to a foster care placement in a different school zone.

3. Children who move due to a court-ordered change in custody due to separation or divorce, or the serious illness or death of a custodial parent.

4. Authorized for good cause in District or charter school policy.

L. Applications to participate in the school choice controlled open enrollment program shall be available at all school sites, the Office of Student Assignment (OSA), and on the District's website during the choice controlled open enrollment application period. This

form shall be completed by the student's enrolling parent or legal guardian and submitted to the designated office prior to the close of the choice controlled open enrollment application period.

M. Students who have been approved through the choice process to attend a school out of their assigned area will be governed by the following rules:

1. Students receiving school choice are approved through the completion of the highest grade level at that school. The choice school therefore becomes the student's assigned District attendance school. However, the principal may recommend that the student be withdrawn and returned to his/her home zoned school for unacceptable academic performance, nonattendance, habitual tardiness, or disciplinary issues. The principal's recommendation is subject to review by the District Administrative Appeals Committee.

2. Students who are approved for choice are expected to continue in attendance at the choice school throughout at least one (1) school year, and may then apply for a different school, including their original boundary assigned school, but only through application during the choice designated application period.

N. Beginning by the 2017-2018 school year, as part of the School District's controlled open enrollment process, and in addition to the existing public school choice programs provided in F.S. 1002.20(6)(a), the District school shall allow a parent from any school district in the State whose child is not subject to a current expulsion or suspension to enroll his/her child in and transport his/her child to any public school that has not reached capacity in the District, subject to the maximum class size pursuant to F.S. 1003.03 and s. 1, Art. IX of the State Constitution. The School District shall accept the student, pursuant to the District's controlled open enrollment process, and report the student for purposes of the School District's funding pursuant to the Florida Education Finance Program. Transportation for students is not provided.

~~**Use of Guardianship Affidavit**~~

~~A. When a student's parent or legal guardian resides outside of Manatee County, temporary guardianship may be granted to a Manatee County resident for school enrollment purposes. However, both the parent and temporary guardian must complete a guardianship affidavit and evidence of parent address prior to the student's enrollment in the School District. The school assignment will be based on the verified address of the temporary guardian.~~

~~B. A student whose parent/guardian resides in Manatee County may be assigned to a school based on the residence of a temporary guardian only when verification of the need for same is provided by a local agency such as the Department of Children and Family Services. Lacking any such verification, all students will be assigned to school based on the residence of their parent/legal guardian, unless written approval to the contrary is approved through the Office of Student~~

**Demographics, Projections, and Assignment following review and approval of District Administrative Appeals Committee.**

**Students Transferring from Out-of-State**

A. Any student who transfers from an out-of-state public or nonpublic school and who meets the regular age requirements for admission to Florida public schools shall provide the documentation listed in Parent's Responsibility for Student Enrollment above prior to admission. In determining the students' placement:

1. The District will consider the students' last successful grade of completion as evidenced in the students' school records.

2. In the absence of school records, the student will be tested and placed according to Policy 5410, *Student Progression*.

B. Any student who transfers from an out-of-state public school and who does not meet regular age requirements for admission to Florida public schools shall provide the following prior to admission:

1. Official documentation that the parent(s) or guardian(s) was a legal resident(s) of the state in which the student was previously enrolled in school.

2. Acceptable documentation is as follows:

a. Deed, listing homeownership in that state.

b. Lease or rental agreement.

c. Electric or water bill.

d. Tax return for the most recent tax year.

Supporting documentation, must list the name and former address of the parent(s) or guardian(s) in that state.

e. An official letter or transcript from proper school authority which shows record of attendance of a minimum of one (1) week in Kindergarten or First Grade, academic information, and grade placement of the student.

f. Florida Certificate of Immunization.

3. ~~Evidence of Date of Birth as provided in Parent's Responsibility for Student Enrollment of this policy.~~

4. ~~Physical examination. An examination paper must be signed by a licensed examiner and must have been issued within twelve (12) months prior to enrollment. Physical must be a head-to-toe exam. Out-of-state physicals are acceptable provided they meet Florida exam requirements.~~

~~C. Any student who transfers from an out-of-state nonpublic school and who does not meet regular age requirements for admission to Florida public schools shall be admitted if the student meets age requirements for public school within the state from which s/he is transferring and if the transfer of the student's academic credit is acceptable under the rules provided in section 4.9, Student Progression, of the policies and procedures of the Board. Prior to admission, the parent or guardian must provide the documentation required in Item B of this section above.~~

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**District Administrative Appeals Committee**

The District Administrative Appeals Committee is established to review parent requests for hardship consideration for attending a school other than the assigned boundary school. The committee shall be made up of various directors and supervisors of District programs, including the directors of elementary, middle, and high school.

~~**District Child Study Team**~~

~~As part of the District student assignment process, at-risk students may be referred by the principal to the Office of Dropout Prevention and Alternative Education for consideration for additional support services and strategies at the school level or for alternative placement. This referral may be made for students with extreme behavioral or attendance and tardiness issues. The District Dropout Prevention Specialist may refer the request to the District Child Study Team.~~

~~However, any such referral must be supported by extensive evidence of a review by the school child study team, including parental involvement, and implementation of resulting recommended strategies. All ESE student referrals shall be subject to applicable law. The District team shall consider all learning issues, including the best interest of the referred student, as well as the best interest of other students and staff of the referring school in resolving student issues.~~

~~**Class Size Assignments**~~

~~A. In compliance with F.S. 1003.03 which requires all districts to adhere to class size maximums a student may be assigned from the zoned school to another District school /alternate school) at date of enrollment due to a grade level reaching maximum~~

~~class size capacity.~~

~~B. When a school reaches maximum class size capacity in one or more grade levels the following procedures will apply to new enrollments:~~

~~1. Students in the same family will be assigned to the same alternate school. The parent/guardian may choose to enroll student/sl in open grade levels at the zone school and have only the student(sl in the closed grade/sl assigned to an alternate school.~~

~~2. Students assigned to an alternate school due to class size are assigned to the school for the remainder of the school year.~~

~~3. Transportation is provided to students living more than two (2) miles from the assigned school.~~

~~4. Students who have been placed by a class size assignment have a priority for enrollment at the zone school for the following school year.~~

~~5. The parent/guardian of student(s) may choose to remain at the alternate school to the highest grade available at that school. No transportation is provided after the first year.~~

~~6. incoming siblings will be permitted to attend the same class size assignment school as a student who remained at an alternate school.~~

**Student Assignment to School or Program**

The Superintendent or designee is authorized to assign a student to any program or school as deemed to be in the best interest of the student or School District.

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Revised 1/16/24

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Legal

F.S. 1000.05
F.S. 1001.32
F.S. 1001.41
F.S. 1001.42
F.S. 1001.51
F.S. 1002.20
F.S. 1002.31

F.S. 1003.06

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6110 - **GRANT FUNDS**

It is the objective of the School Board to provide equal educational opportunities for all students within the District. Government agencies, as well as foundations, businesses, and individuals, periodically offer to the School District both human and material resources that would be of benefit to the students in this school system. Therefore, it is the intent of the Board to revise and evaluate grant proposals and applications, for their potential to enhance the educational opportunities, the educational environment, and the physical and mental growth for each student.

The Board regards available grant funds provided to the District as a public trust. It forbids the use of public monies for partisan political activities and any use that would not be in accordance with Federal regulations and guidelines.

No ~~Federal~~ funds received by the District shall be used to:

A. develop or distribute materials or operate programs or courses of instruction directed at youths that are designed to promote or encourage sexual activity whether homosexual or heterosexual;

B. distribute or aid in the distribution by any organization of legally obscene materials to minors on school grounds;

C. provide sex education or HIV-prevention education in schools unless that instruction is age appropriate and includes the health benefits of abstinence; or

D. operate a program of contraceptive distribution in schools.

The Superintendent **or designee** shall review grant opportunities and authorize development of proposals.

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**Grant Proposal Development**

A. All grant proposals must support at least one (1) Board goal or priority.

B. For projects where grant funds will not cover the entire cost of project implementation, additional fund sources must be identified, documented, and approved during the internal review process.

C. All grant proposals that will result in ongoing costs at the end of the grant period must identify a proposed source of continuing funding.

**Grant Proposal Internal Review**

A. Each grant proposal shall be reviewed and approved by appropriate District staff prior to submission to the Superintendent **or designee**.

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B. Each grant proposal shall be reviewed and approved by the Superintendent **or designee** prior to submission to the funding source.

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C. The Superintendent may identify a project director prior to proposal submission.

D. The Superintendent shall ~~promptly~~ present **any proposals with budgets exceeding $50,000** ~~the following proposals~~ to the Board for approval:

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~~1. government-funded proposals, regardless of amount;~~

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2. ~~proposals with budgets exceeding $50,000; or~~

3. ~~multi-school or District-wide proposals.~~

E. ~~The Superintendent may accept private funded or foundation grants of less than $50,000 for individual schools.~~

**Grant Administration**

A. The administration of grants will adhere to all applicable Federal, State, and grantor rules and regulations, including the terms and conditions of the Federal awards, as well as School District policies and administrative procedures.

B. The Superintendent **or designee** ~~and/or Board Chairman are~~ **is** authorized to sign related documents for grant administration, including documents required for submittal of grant proposals.

C. Written amendments **changing the scope and/or purpose shall be presented to the** ~~requiring signature shall be promptly presented to the Superintendent and/or~~ Board for approval.

D. Employee positions established through the use of grant funding shall terminate if and when the related grant funding ceases.

E. Program reports including but not limited to audits, site visits, and final reports shall be provided to the program director and/or Finance Department for review.

F. The program director and/or Finance Department will confirm closure of all grants to the Superintendent.

G. The District, in recognition of its unique combination of staff, facilities, and experience, shall employ internal controls, including the organizational and management strategies necessary to assure proper and efficient administration of grant awards.

H. All Federal funds received by the District will be used in accordance with the applicable Federal law and regulations and the terms and conditions of the Federal award. Each draw of Federal monies shall be aligned with the District's payment process (whether reimbursement, cash advance, or a combination). If funds are permitted to be drawn in advance, all draws will be equal in magnitude as closely as administratively feasible, to the magnitude of the related program expenditures. When restricted, such monies will be used to supplement programs and funding and not to supplant or replace existing programming or current funding.

   Maintenance of Effort (MOE) and Maintenance of Equity (MOEquity) requirements of the Federal program will be met in accordance with the requirements of the specific funded program. The District shall maintain appropriate documentation and records to substantiate compliance or to justify allowable exceptions, exemptions, or waivers.

**Financial Management**

The financial management of grant funds shall be in compliance with all applicable Federal, State, local and grantor rules, regulations, and assurances as well as District policies and administrative procedures.

The District shall provide for the following:

A. Identification, in District accounts, of all grant awards received and expended and the programs under which they were received. For Federal programs and awards, identification shall include the Catalog of Federal Domestic Assistance (CFDA) title and number, Federal award identification

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number and year, name of the Federal agency and name of the pass-through entity, as applicable.

B. Accurate, current, and complete disclosure of the financial results of each Federal award or program in accordance with the reporting requirements of the grant.

C. Records that identify adequately the source and application of funds provided for Federally-funded activities. These records must contain information pertaining to Federal awards, authorizations, obligations, unobligated balances, assets, expenditures, income and interest and be supported by source documentation.

D. Effective control over, and accountability for, all funds, property, and other assets. The District must adequately safeguard all assets and assure that they are used solely for authorized purposes.

   Further, the District must:

   1. establish and maintain effective internal control over the Federal award that provides reasonable assurance that the District is managing the Federal award in compliance with Federal statutes, regulations, and the terms and conditions of the Federal award;

   2. comply with Federal statutes, regulations, and the terms and conditions of the Federal award;

   3. evaluate and monitor the District's compliance with statutes, regulations, and the terms and conditions of the Federal award;

   4. take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings;

   5. take reasonable measures to safeguard protected personally identifiable information and other information the Federal awarding agency or pass-through entity designates as sensitive consistent with applicable Federal, State, local, and tribal laws regarding privacy and obligations of confidentiality.

E. Comparison of expenditures with budget amounts for each Federal award.

F. Recordkeeping and written procedures to the extent required as may be required by Federal, State, local and grantor rules, and regulations pertaining to the grant award and accountability, including, but not limited to, the following areas:

   1. cash management

   2. allowability

   3. conflict of interest

   4. procurement

   5. equipment management

   6. conducting technical evaluations of proposals and selecting recipients

   7. compensation and fringe benefits

   8. travel

G. Disclosure of any potential conflict of interest and all mandatory violation disclosures potentially affecting the Federal award/grant to the Federal awarding agency or pass-through agency in accordance with applicable Federal policy.

H. Insurance coverage for real property and equipment, if applicable, equivalent to such property owned by the District.

**Program Income**

Program income means gross income earned by a grant recipient that is directly generated by a supported activity or earned as a result of the Federal award during the grant's period of performance.

It includes, but is not limited to, income from fees for services performed, the use or rental of real or personal property acquired under Federal awards, the sale of commodities or items fabricated under a Federal award, license fees and royalties on patents and copyrights, and principal and interest on loans made with Federal award funds. Interest earned on advances of Federal funds is not program income. Except as otherwise provided in Federal statutes, regulations or the terms and conditions of the Federal award, program income does not include rebates, credits, discounts and interest earned on any of them. Additionally, taxes, special assessments, levies, fines and other such revenues raised by a recipient are not program income unless the revenues are specifically identified in the Federal award or Federal awarding agency regulations as program income. Finally, proceeds from the sale of real property, equipment, or supplies are not program income.

Unless it has received prior approval to use a different method or the terms and conditions of the grant authorize a different method, the District uses the deduction method of accounting for program income. Under the deduction method, program income is deducted from total allowable costs to determine the net allowable costs. Program income will only be used for current costs unless the District is otherwise directed by the Federal awarding agency or pass-through entity.

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34 C.F.R. 75.707
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2 C.F.R. 200.343(b)&(e)
Compliance Supplement for Single Audits of State and Local Governments
F.S. 1001.42
F.S. 1001.51

**Last Modified by Tammy R Shroyer on August 25, 2022**