

7145 Babcock Street, S.E.
Palm Bay, Florida 32909
Phone (321) 723-0650
Fax (321) 722-1117
www.royalpalmcharter.com

6/22/22 @ 3:30 PM

Board of Directors Meeting Agenda

Directors:

Lori Grodecky, President
Erik Brown, Vice President
Alisha D'Alessandro Rozynski, Secretary
Kyley Haynes, Treasurer
Rachel Costa, Member

- I. **Call to Order** *Grodecky called meeting to order at 3:40 pm, Rozynski 2nd*
- II. **Roll Call** *Grodecky, Costa, and Becka present in person; Brown, Rozynski and Haynes present on Zoom Brown motioned to adopt the agenda, Haynes 2nd*
- III. **Reports and Presentations:**
 1. Financial Update – Allison Becka
 - i. BVA Becka reviewed the attached BVA – she noted that showing 100% of revenue projected because additional funds have come in with the Surtax funds – we estimated based on the few that were received last year. Also, additional funds in Title 1 with roll over funds and ESSER funding. Noted a significant different in budget to actual in Capital Outlay – used ESSER funds to replace AC units in Building A that weren't on the initial budget. Electricity cost have increased. The school is looking to finish out the school year in a good position financially.
 - ii. Balance Sheet Becka reviewed attached Balance Sheet, noted that the school has come from 2017 at -\$80,000 to 1.2 million equity!
 2. Admin Update – Sviben
 - i. BPS Site Visit – review Mrs. Sviben reviewed the attached site visit report – the school did well and there were no areas of concerns noted
 - ii. Enrollment – see attachment Full in almost all grades, a few openings in 5th and some in 5th. Waiting lists in most grades. Combined the 6th grade class into one room – reduced the number of spots
 - iii. Strategic Plan Mrs. Sviben reviewed the attached strategic plan document
 1. Staff Changes went through staff changes as listed on document, with the addition of moving Katherine Teijeiro from 4th grade teacher to Math Resource teacher – she will be focusing on math remediation/RTI – she will be on maternity leave from some point in August until Winter Break. Library and Music listed as TBD – to be determined – but for this school year it has been decided that Ms. Densler will do a STEAM class instead of Music (in order to put both 6ths into one room) and on Fridays they will rotate between a 3rd day of PE and a leadership class with Mrs. Marshall. The cafeteria manager position says TBD, but Mrs. Sviben has been talking to Kile Winslow and she is interested in coming back to work at RP.
 2. Curriculum Reviewed purchases to be made. The only addition not on this list is possibly adding MyOn and/or Accelerated Reader in order for students to have access to books at all times since the library is not as accessible, although Ms. Densler does plan to bring books into the classrooms on a monthly basis.
 3. Purchases, etc When reviewing the strategic plan has an allocation for music supplies, going to transfer that to the STEAM class. Mrs. Sviben said she did not mention the replacement of carpet for building A – as a part of the ESSER grant – it was in last year's,

but it finally got approved through the state so it will be done this year over one of the breaks.

4. 22-23 Preliminary Budget Allison reviewed the preliminary budget based on the figures included in the Strategic Plan. Noted it included the previously approved minimum base of \$46,800.

3. Discuss New Building Progress

- i. Phase 1 & Phase 2 Timeline *Mrs. Sviben told the board that they had completed all they could of phase 1 at this point – waiting for concrete. It will not be completed until after the start of school and at this point they have RP on the list the beginning of August. Once Phase 1 is completed the school will implement the new car loop path in hopes of getting cars off of Babcock and the Phase 2 (building) will be given permit and construction can begin. The estimated timeline for Phase 2 is 6 months. It is possible that the modular buildings will have to be removed during construction so Mrs. Sviben is planning to move those classrooms into Building C if needed – which is why 6th was combined into library and no music/library this year. A pod was brought in to house the library books until moved. Initially 3-5 were going to go into the new building – Mrs. Sviben is thinking of keeping 5th where they are and moving grades 1-4 into the new building. Grades VPK and K have to have in-class bathrooms so they will need to remain in building A. There is a lounge in the new building and an admin office, once it is built more discussion will happen about who will move their office to the new building.*
 - ii. Phase 1 Cost Increase *See attached – due to increase in material costs*
 - iii. Funding progress – LOI *Mrs. Sviben has been working with the USDA person with Ameris Bank to secure the funding and work through the process.*
4. Board Members *At this time there were no suggestions for additional board members, Haynes said the candidate she previously suggested hasn't shown much interest further so not an option. Grodecky encouraged board members to just keep it in their mind as they are working in the community for an additional member – but not a must at this time.*
- i. Other Suggestions?
5. Discuss Options for Interest/Investing *Mrs. Sviben presented the information from Edward Jones and Chase bank regarding options for investments. At this time there's not much yielding large interest without risks, it was agreed that the school does not want to put their funds into something that could result in loss. The board did discuss the option to open an additional savings account at a local bank, in addition to the Chase bank account, in order to move funds into an account separate from current account to provide additional security of the funds as well as consider some CDs in the near future. At this time going to hold off on putting any funds into CDs until we see where the building costs of Phase 1 come in at.*
- i. Chase Bank
 - ii. Edward Jones

IV. **Consent Agenda:** *Haynes motioned to adopt Consent Agenda, Rozynski 2nd*

1. Approve Hadow Phase 1 Contract
2. Approve LOI
3. Approve 22-23 Strategic Plan
 - i. New Hires (Stimpson, Gilbert, Irizarry, Wilder, Surrena, Shafer, Fish, Howard, Mellott)
4. Approve 22-23 Board Meeting Calendar
5. Approve Board Meeting Minutes 4/13/22


V. **Non-Consent Agenda:**

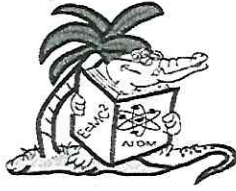
1. Next Meeting: Wednesday, June 20, 2022 at 5:30PM

VI. **Public Comment:** *None*

VII. **Motion to Adjourn:** *Rozynski motioned to adjourn, Haynes 2nd @5:39PM*




Erik Brown
Rogers Palm Church Board VP 7/27/2022



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I. Call to Order

II. Roll Call

III. Reports and Presentations:

1. Financial Update
 - i. BVA
 - ii. Balance Sheet
2. Admin Update – Sviben
 - i. BPS Site Visit – review
 - ii. Enrollment – see attachment
 - iii. Strategic Plan
 1. Staff Changes
 2. Curriculum
 3. Purchases, etc
 4. 22-23 Preliminary Budget
3. Discuss New Building Progress
 - i. Phase 1 & Phase 2 Timeline
 - ii. Phase 1 Cost Increase
 - iii. Funding progress - LOI
4. Board Members
 - i. Other Suggestions?
5. Discuss Options for Interest/Investing
 - i. Chase Bank
 - ii. Edward Jones

IV. Consent Agenda:

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VI. Public Comment:

VII. Motion to Adjourn:

Strategic Planning 2022-23

Staff

Vega return to VPK/Noel Partner
 K Teacher - Jennifer Stimpson
 1st grade teacher - Elissa Gilbert
 3rd grade teacher - Jere Wilder
 4th Grade Teacher - Nanette Irizarry
 6th grade M/S - TBD - Brooke Steelman
 6th grade ELA - Madison Howard
 MS History - move Justin Clermont
 MS ELA - Monica Surrena
 ESE Teacher - move Theresa Steelman
 Gifted Only - Kerri Bolling
 Elem PE - Stefani Shafer
 MS PE - Vanessa Fish
 Math Resource - Katherine Teixeira
 K/1 ESE/Teacher Asst - Suellen Mellott (Wright)
 1/2 Teacher Asst - Darlene McKendrick
 VPK Director - Karen Wright
 Cafeteria Manager - TBD
 Library/Music - TBD

Teacher Schedule

STEM instead of Music
 Additional PE Day OR Leadership Class instead of Library

Teacher Pay 46,800 Base & 2% increase for remainder Teacher Salary Increase

Continue paying 100% employee benefits
 Continue longevity bonuses
 Renew app Observation System 1520

Curriculum

Brainpop Subscription	2550	
Discovery Ed Online Renewal		
Stemscopes	30,925	ESSER
Secret Stories	2,000	
Go Math Materials	52,000	ESSER
FL Ready		
Measure Up		
Edgenuity	22000	ESSER
NWEA (MAPS)	4375	ESSER
Learning A-Z	4593.6	
ESE Materials		
Pearson KTEA	720.5	
Multi Health Systems	425	
UPAR	7250	ESSER
IPADS	2500	ESSER

Materials

Art Supplies	1000
PE Supplies	1000
Music Supplies	1000

Social/Emotional

Franklin Covey Materials/Renewal	25000	ESSER
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Furniture

Rocker Chairs
 Standing Tables

Technology

Laptop Cart	12,000	ESSER
Update Teacher Laptops	8500	ESSER

Training

Secret Stories Phonics	5000	ESSER
CKLA k-5/Amplify ELA	20850	ESSER
Amplify ELA 6-8	10000	ESSER

Building

Install Additional Security Cameras	2000	Safety & Security Grant
Purchase additional phones/lines	2000	
Repair Perimeter Fence		
Cut down brush around Perimeter	3,000	

Lunch

Horizons Software System	5000
	225689.1

Royal Palm Charter
Profit & Loss Budget vs. Actual
July 2021 through May 2022

Accrual Basis

	Jul '21 - May 22	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Income				
3200 . Federal through state and local				
3230 . IDEA Funds	0.00	6,000.00	-6,000.00	0.0%
3240 . Title I	113,763.37	165,000.00	-51,236.63	68.9%
3261 . School Lunch Reimbursement	81,773.94	118,202.00	-36,428.06	69.2%
3270 . ESSR CARES	278,973.01	145,000.00	133,973.01	192.4%
Total 3200 . Federal through state and local	474,510.32	434,202.00	40,308.32	109.3%
3300 . State sources				
3310 . FEFP	2,182,398.58	2,358,515.00	-176,116.42	92.5%
3330 . Classroom Supply Assistance	5,862.42			
3371 . VPK	13,133.14			
3395 . GEER Grant	0.00	0.00	0.00	0.0%
3397 . Capital Outlay Funds	144,738.00	155,288.00	-10,550.00	93.2%
3399 . Miscellaneous State Sources	44.94			
Total 3300 . State sources	2,346,177.08	2,513,803.00	-167,625.92	93.3%
3400 . Revenue from Local Sources				
3398 . Sales surtax	225,590.90	180,000.00	45,590.90	125.3%
3440 . Donations	0.00	1,000.00	-1,000.00	0.0%
3451 . Student Lunches	1,046.00	8,200.00	-7,154.00	12.8%
3473 . School-Age Child Care Fees	43,143.12			
3474 . PTO	8,173.89			
3477 . Clubs & Sports	9,783.76			
3482 . Charges for Sale-Book Fair	3,033.98			
3490 . Miscellaneous Local Sources				
3495 . Other Misc Local Sources	11,029.05			
3490 . Miscellaneous Local Sources - Other	10,942.64			
Total 3490 . Miscellaneous Local Sources	21,971.69			
Total 3400 . Revenue from Local Sources	312,743.34	189,200.00	123,543.34	165.3%
Total Income	3,133,430.74	3,137,205.00	-3,774.26	99.9%
Gross Profit	3,133,430.74	3,137,205.00	-3,774.26	99.9%
Expense				
100 . Salaries				
110 . Administrator	323,647.29	322,304.00	1,343.29	100.4%
111 . Administrator - Bonus	3,300.00			
120 . Classroom Teacher	1,173,449.96	1,236,673.00	-63,223.04	94.9%
121 . Classroom Teacher - Bonus	18,400.00			
130 . Other Certified	-2,121.77	47,734.00	-49,855.77	-4.4%
160 . Other Support Personnel	68,516.56	31,380.00	37,136.56	218.3%
Total 100 . Salaries	1,585,192.04	1,638,091.00	-52,898.96	96.8%

Royal Palm Charter
Profit & Loss Budget vs. Actual
July 2021 through May 2022

Accrual Basis

	Jul '21 - May 22	Budget	\$ Over Budget	% of Budget
200 . Employee Benefits				
210 . Retirement	25,004.72	25,108.00	-103.28	99.6%
220 . Social Security	113,486.86	121,192.00	-7,725.14	93.6%
230 . Group Insurance	210,258.45	132,539.00	77,719.45	158.6%
240 . Worker's Compensation	2,772.44	9,310.00	-6,537.56	29.8%
250 . Unemployment Compensation	358.00	7,260.00	-6,902.00	4.9%
Total 200 . Employee Benefits	351,860.47	295,409.00	56,451.47	119.1%
300 . Purchased Services				
310 . Professional & Technical Svcs				
320 . Insurance and Bond Premiums	62,691.18	118,600.00	-55,908.82	52.9%
330 . Travel	9,263.08	37,421.00	-28,157.92	24.8%
350 . Repairs and Maintenance	5,790.39	28,150.00	-22,359.61	20.6%
360 . Rentals	11,169.92	5,300.00	5,869.92	210.8%
365 . Software Subscriptions	69,606.45	63,398.00	6,208.45	109.8%
370 . Communications	632.99			
380 . Public Utility Services	12,700.91	16,600.00	-3,899.09	76.5%
390 . Other Purchased Services	7,072.41	6,600.00	472.41	107.2%
300 . Purchased Services - Other	100,594.04	108,000.00	-7,405.96	93.1%
	0.00	0.00	0.00	0.0%
Total 300 . Purchased Services	279,521.37	384,069.00	-104,547.63	72.8%
400 . Energy Services				
430 . Electricity	45,738.72	28,985.00	16,753.72	157.8%
Total 400 . Energy Services	45,738.72	28,985.00	16,753.72	157.8%
500 . Materials & Supplies				
510 . Supplies	90,289.36	84,500.00	5,789.36	106.9%
520 . Textbooks	80,922.50	145,000.00	-64,077.50	55.8%
570 . Food	74,827.65	60,000.00	14,827.65	124.7%
Total 500 . Materials & Supplies	246,039.51	289,500.00	-43,460.49	85.0%
600 . Capital Outlay				
630 . Buildings & Fixed Equipment				
640 . Furniture, Fixtures & Equipment	0.00	50,000.00	-50,000.00	0.0%
641 . Capitalized F F & E	67,890.92			
642 . Noncapitalized F F & E	3,867.90	3,425.00	441.90	112.9%
643 . Capitalized Computer Hardware	10,450.00	10,000.00	450.00	104.5%
644 . Noncap Computer Hardware	899.00			
Total 640 . Furniture, Fixtures & Equipment	83,107.82	13,426.00	69,681.82	619.0%
Total 600 . Capital Outlay	83,107.82	63,426.00	19,681.82	131.0%

Royal Palm Charter
Profit & Loss Budget vs. Actual
July 2021 through May 2022

Accrual Basis

	Jul '21 - May 22	Budget	\$ Over Budget	% of Budget
700 - Other Expenses				
710 - Redemption of Principal	50,167.07	42,962.00	7,205.07	116.8%
720 - Interest	163,870.27	190,534.00	-26,663.73	86.0%
730 - Dues & Fees	63,195.70	21,000.00	42,195.70	300.9%
79017 - Student Activity - Clubs	3,045.50			
Total 700 - Other Expenses	280,278.54	254,496.00	25,782.54	110.1%
Total Expense	2,871,738.47	2,953,976.00	-82,237.53	97.2%
Net Ordinary Income	261,692.27	183,229.00	78,463.27	142.8%
Net Income	261,692.27	183,229.00	78,463.27	142.8%

**Royal Palm Charter
Balance Sheet
As of May 31, 2022**

Accrual Basis

	May 31, 22
ASSETS	
Current Assets	
Checking/Savings	
1000 · Chase Bank - Operating	787,761.25
1103 · Chase Bank - PTO	2,552.96
Total Checking/Savings	790,314.21
Accounts Receivable	
1130 · Accounts receivable	202,832.46
1131 · Capital Outlay Recievable	50,845.00
Total Accounts Receivable	253,677.46
Other Current Assets	
1135 · Due from Other Funds	91,902.63
1234 · Deposits - FPL	5,022.00
1235 · Prepaid expenses	126,553.82
Total Other Current Assets	223,478.45
Total Current Assets	1,267,470.12
TOTAL ASSETS	1,267,470.12
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2100 · Accounts Payable	15,479.77
Total Accounts Payable	15,479.77
Other Current Liabilities	
2104 · Garnishment	-979.98
Total Other Current Liabilities	-979.98
Total Current Liabilities	14,499.79
Total Liabilities	14,499.79
Equity	
Retained Earnings	991,278.06
Net Income	261,692.27
Total Equity	1,252,970.33
TOTAL LIABILITIES & EQUITY	1,267,470.12

Business Deposit Rates



RATES IN EFFECT AS OF: Tuesday, June 14, 2022

We use two different terms to tell you how much interest we pay:

- **Interest Rate:** Annualized simple percentage rate we pay on your account, and does not reflect compound interest.
- **Annual Percentage Yield (APY):** Annualized percentage rate we pay on your account, including compound interest. (Compound interest is the interest paid on interest you've already earned.) The APY may be higher than the Interest Rate.

BUSINESS SAVINGS ACCOUNTS

To earn Premier relationship rates, your Chase Business Premier SavingsSM needs to be linked to either a Chase Performance Business Checking[®], Chase Platinum Business CheckingSM or Chase Analysis Business CheckingSM account (interest counterparts included, where applicable) with at least five customer-initiated checking account transactions each monthly statement period.

Chase Business Premier SavingsSM

RELATIONSHIP RATES		STANDARD RATES		RELATIONSHIP RATES		STANDARD RATES	
Balance	Interest Rate APY	Interest Rate APY	Interest Rate APY	Balance	Interest Rate APY	Interest Rate APY	Interest Rate APY
\$0-\$9,999	0.02% 0.02%	0.01% 0.01%	\$250,000-\$499,999	0.02% 0.02%	0.01% 0.01%	\$500,000-\$999,999	0.02% 0.02%
\$10,000-\$24,999	0.02% 0.02%	0.01% 0.01%	\$1,000,000-\$4,999,999	0.02% 0.02%	0.01% 0.01%	\$5,000,000-\$9,999,999	0.02% 0.02%
\$25,000-\$49,999	0.02% 0.02%	0.01% 0.01%	\$10,000,000+	0.02% 0.02%	0.01% 0.01%		
\$50,000-\$99,999	0.02% 0.02%	0.01% 0.01%					
\$100,000-\$249,999	0.02% 0.02%	0.01% 0.01%					

Contact Business Banking Pricing for rates on balances greater than \$20 million and/or terms less than 6 months before providing rate indications to clients.

Chase Business Total SavingsSM

Balance	Interest Rate	APY
\$0-\$9,999	0.01%	0.01%
\$10,000-\$24,999	0.01%	0.01%
\$25,000+	0.01%	0.01%

Client Funds SavingsSM

Balance	Interest Rate	APY
\$0-\$49,999	0.01%	0.01%
\$50,000-\$99,999	0.01%	0.01%
\$100,000+	0.01%	0.01%

BUSINESS INTEREST CHECKING

Chase Analysis Business Checking with InterestSM

	Interest Rate	APY
All Balances	0.01%	0.01%

IOLTASM

Balance	Interest Rate	APY
\$0-\$99,999	0.10%	0.10%
\$100,000-\$999,999	0.10%	0.10%
\$1,000,000+	0.10%	0.10%

Chase Performance Business Checking with Interest[®]

	Interest Rate	APY
All Balances	0.01%	0.01%

EARNINGS CREDIT RATES FOR BUSINESS BANKING

Chase Analysis Business CheckingSM

Balance	Interest
\$0-\$99,999	0.14%
\$100,000+	0.14%

BUSINESS CERTIFICATES OF DEPOSIT (CD) INTEREST RATES

CD rates are fixed for the selected term and compounded daily. Business checking and savings account rates are variable and interest compounded and credited monthly. Account fees could reduce earnings. CD ladders are a group of four CDs opened at the same time for the same amount but with different terms. Interest is compounded daily and you may choose to have interest paid on your CD, depending on the term, either monthly, quarterly, semiannually or annually and at maturity. The APY is based upon the maximum term of deposit for each maturity range. There is a penalty for early withdrawal.

Featured Terms (Months)	RELATIONSHIP RATES ¹				STANDARD RATES			
	\$1,000-\$9,999		\$10,000-\$99,999		\$100,000+		\$1,000+	
	Interest Rate	APY	Interest Rate	APY	Interest Rate	APY	Interest Rate	APY
12 - 14	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
24 - 29	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
36 - 41	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
Other Terms ²								
1-2	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.01%	0.01%
3 - 5	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.01%	0.01%
6 - 8	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
9 - 11	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
15 - 17	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
18 - 20	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
21 - 23	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
30 - 35	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
42 - 47	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
48 - 83	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
84 - 120	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
Ladder Terms (Months) ²	RELATIONSHIP RATES ¹				STANDARD RATES			
	\$1,000-\$9,999		\$10,000-\$99,999		\$100,000+		\$1,000+	
	Interest Rate	APY	Interest Rate	APY	Interest Rate	APY	Interest Rate	APY
1	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.01%	0.01%
2	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.01%	0.01%
3	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.01%	0.01%
4	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.01%	0.01%
3	0.02%	0.02%	0.02%	0.02%	0.02%	0.02%	0.01%	0.01%
6	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
9	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%
12	0.02%	0.02%	0.05%	0.05%	0.05%	0.05%	0.01%	0.01%

Chase Analysis Business Checking and Chase Analysis Business Checking with Interest Earnings Credit Rates apply to activity for the previous calendar month.

¹ Requires any linked business checking account except Public Funds Checking, Chase Nonprofit BusinessClassicSM Checking, IOLTA/COLTAF/CARHOFSM and Client Funds CheckingSM at account opening and at each renewal.

² A one month term is at least 31 days.

A copy of the Deposit Account Agreement is available upon request. Rates and balance tiers for checking, savings and CDs are applicable as of the effective date, and may change at Chase's discretion.

Edward Jones Advisory Solutions®

Strategy. Discipline. Execution.

Do you believe your investment strategy could benefit from a more disciplined approach and extra layer of expertise? If so, now may be a good time to consider Edward Jones Advisory Solutions®. With Advisory Solutions, you can leave the daily investment decisions to a team of research analysts dedicated to making sure your portfolio adheres to your investment goals.

We do the hard work for you:

Asset allocation – Your money is diversified among different types of investments according to your risk tolerance, goals and investing timeline. Our research analysts determine the right percentages for each category based on these factors. This is called your asset allocation.

Investment selection – Our professionals take great care to identify and select the right mix of investments that complement one another, helping smooth the effects of market fluctuation.

Threshold rebalancing – Advisory Solutions employs a dynamic threshold rebalancing process to keep your asset classes in line with their original allocation. This helps keep your investments in line with your goals and risk tolerance.

Tax-efficient management – Our Unified Managed Account (UMA) Models use strategies designed to help you reach your financial goals with an additional goal of tax efficiency.

Ongoing review – Periodic reviews help ensure your investments keep pace with your needs. We keep you informed of your progress with detailed quarterly performance reports that include timely market insights.

This approach allows you to spend less time managing your investments, while making sure you have a disciplined approach in place.

For more information about how Advisory Solutions can help you reach your long-term financial goals, talk with your financial advisor today.

Edward Jones is a dually registered broker-dealer and investment adviser. Edward Jones Advisory Solutions® is a wrap fee program that provides investment advisory services. Depending on a client's minimum investment, a client can select Fund Models, which invest in affiliated mutual funds (if available), unaffiliated mutual funds and exchange-traded funds (ETFs), or UMA Models, which also include separately managed allocations (SMAs). Please review the applicable Edward Jones Advisory Solutions Brochure for more information.

Many of the investments in Advisory Solutions are offered by prospectus. You should consider the investment objective, risks, and charges and expenses carefully before investing. The prospectus contains this and other information. Your Edward Jones financial advisor can provide a prospectus, which you should read carefully before investing.

All investment strategies and investments involve risk, and the value of your account will fluctuate. As a result, your account may be worth more or less than the amount of money you invested in Advisory Solutions. Each Program Fund will also fluctuate in value and, when sold, may be worth more or less than the original cost to purchase.

The initial minimum investment in Advisory Solutions is \$25,000. For UMA Models investing in a Balanced Growth & Income, Balanced toward Growth, Growth Focus or All Equity Focus portfolio objective, including Custom Models containing SMAs, the initial minimum investment amount is \$300,000, with additional options available at \$500,000 and \$1 million. For UMA Models investing in an Income Focus or Balanced toward Income portfolio objective, including Custom Models containing SMAs, the initial investment minimum is \$500,000, with additional options available at \$1 million.

Rebalancing an Advisory Solutions account may result in a taxable event. Please contact your tax professional regarding your situation. Automatic rebalancing and asset allocation do not guarantee a profit or protect against loss.



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Financial Advisor
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Edward Jones Select Account

How it works: Select Account

With a Select Account, we'll provide the framework – you decide how you want to use it. Your financial advisor will work with you to provide guidance you can use to help build your portfolio based on your goals, comfort with risk and length of time you have to invest. How you choose to implement this guidance with your financial advisor is up to you – you make the decisions on buys and sells.

Building your portfolio

How much decision-making will I have?

You make the yes/no decisions about what and when to buy and sell, as well as how to allocate your money among various investments. Your financial advisor will be there to offer information and guidance to help you understand your options and make these decisions.

How will I use Edward Jones guidance?

Investment strategists at our headquarters develop guidance for investments and portfolio diversification. Based on your investment goals, comfort with risk and time horizon, your financial advisor will use our firm's investment philosophy and guidance to assist you in building your portfolio.

Ultimately, you decide how to incorporate this guidance. You may choose to deviate based on a unique circumstance or personal preference. However, our goal will always be to partner with you to identify strategies that accommodate your unique situation while helping you continue on the path toward your goals.

What investment choices do I have?

You can hold a wide range of investments in a Select Account, including stocks, bonds, certificates of deposit (CDs), mutual funds, exchange-traded funds (ETFs) and annuities.¹ You and your financial advisor have access to our firm's advice and guidance to help identify and select investments that make sense for you.

Staying on track

Who monitors my account?

We believe in a long-term, buy-and-hold approach to investing, but that doesn't mean buy and ignore. Periodic reviews are a vital component of successful investing, and we recommend you meet with your financial advisor at least once a year to review your investments and your progress toward your goals. Of course, your team will be there to help you as often as you wish.

You can work with your financial advisor to review your account and determine when and how you will rebalance or make changes to keep your portfolio on track. Additionally, Online Access and regular statements can help you stay as involved and informed as you'd like to be.

How will I rebalance my account, and how often?

As you and your financial advisor review your account, you may occasionally need to rebalance your portfolio. Various factors will change the outlook for specific investments. Changing markets will affect the diversification of your portfolio and changes in your life may impact your long-term goals.

Rebalancing can help bring your account back into alignment with your goals and comfort with risk. Your financial advisor will provide you with advice as a framework and then you can determine if, when and how to make changes and rebalance.

Rebalancing choices are not based on a set timetable – they're up to you – so it's important to review your portfolio with your financial advisor at least annually to keep your investments on track.

How will I be updated?

Your financial advisor will keep in touch with you to provide updates and suggestions, and we'll also send you statements at least quarterly and monthly if there's been activity in your account.

Other account characteristics

What is the account minimum?

No minimum amount is required to open an account, and it's easy for you to get started.*

How will I pay, and how much?

With a Select Account, you pay a commission when you buy or sell certain investments. This may be in the form of a sales charge, commission (a percentage of the amount bought or sold) or a markup or markdown on the price of the investment (typically bonds). Some investments, such as mutual funds, may also have internal expenses. Your financial advisor will clearly explain all costs associated with any transaction or service.

¹ Investment choices available may vary depending on the type of Select Account.

* Some investments in Select Accounts require minimum purchase amounts.

Edward Jones, its employees and financial advisors cannot provide tax or legal advice. You should consult your attorney or qualified tax advisor regarding your situation.

Brokerage accounts may include some non-ERISA retirement plans and pooled employer retirement plans. Please contact your financial advisor for additional information.



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Financial Advisor

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Portfolio objective: Balanced toward income

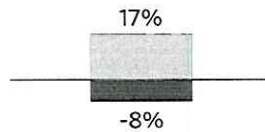
Our long-term outlook

This outlook is based on our long-term return expectations for this portfolio objective in most market environments.

Expected average
annual return

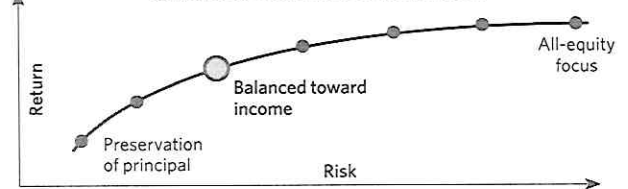
3.5%-5.5%

Expected range of
returns in any one year



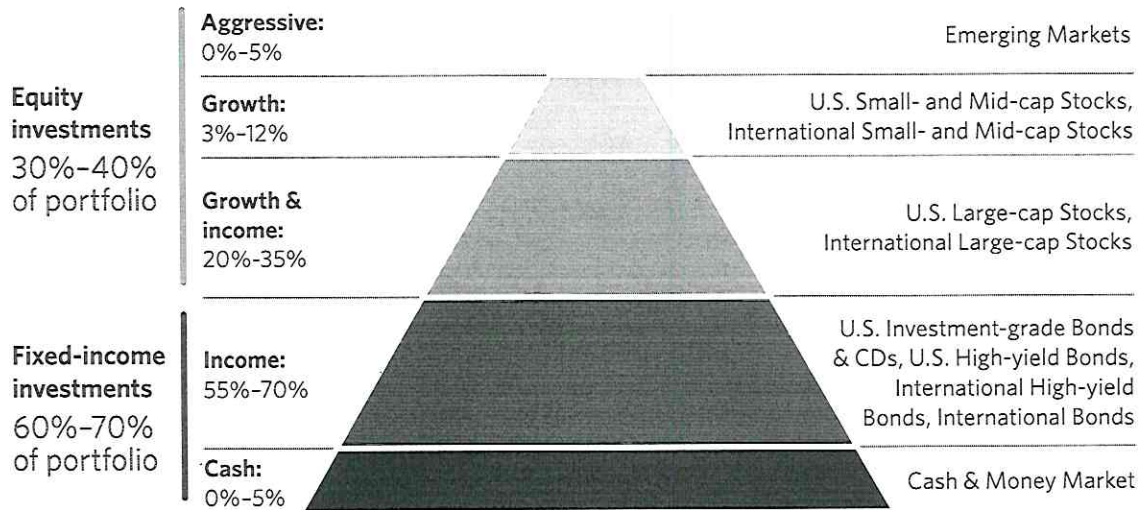
Relative risk and return

Compared to other Edward Jones portfolios



How to build this portfolio

We recommend using the following ranges of investment categories and asset classes as a guide when selecting investments to build this portfolio.



Real Estate, which aligns with the Growth and Income investment category, and commodities, alternative investments and stocks trading less than \$4, which align with the Aggressive investment category, are not displayed because they are not recommended.

This portfolio objective:

Emphasizes current interest income while providing modest long-term growth and rising dividend potential.

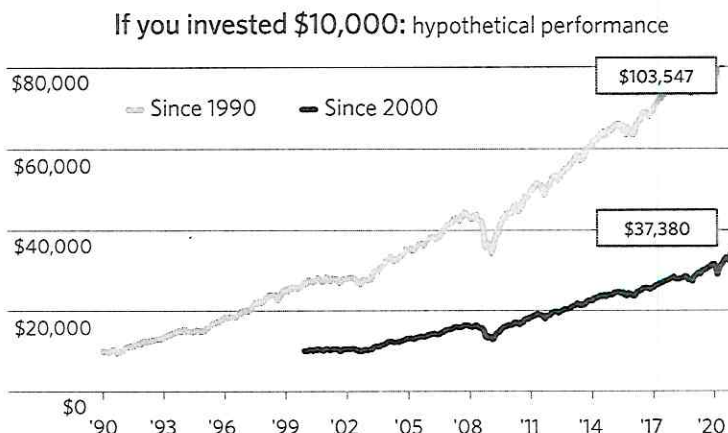
Over the long term, should have lower to moderate risk.

Is expected to have noticeably lower fluctuations in value and materially lower long-term return potential than the stock market.

Holds approximately 5%-25% in international investments and no more than 18% in high-yield bonds or other aggressive-income investments.

A historical perspective

What this portfolio's recommended mix of investments could have experienced since 1990:



Past performance is no guarantee of future results. Results rounded to the nearest \$100. See Page 2 for more information on how historical performance is calculated.

Taking a look back: 1990-2021



Portfolio objective: Balanced toward income

A historical perspective

Past performance does not guarantee future results. But reviewing historical performance can provide some perspective when determining whether the portfolio aligns with your comfort level with risk and your overarching goals. This section highlights the hypothetical performance our recommended allocation for this objective could have experienced since 1990, using the allocations and indexes below to represent different asset classes.

Allocations and indexes used to calculate historical performance

Investment Category	Asset Class	Index	Weight%*
Aggressive	Emerging-market Stocks	MSCI Emerging Markets	2%
	U.S. Mid-cap Stocks	Russell Mid-cap	5%
Growth	U.S. Small-cap Stocks	Russell 2000	2%
	Developed Int'l Small- and Mid-cap Stocks	MSCI EAFE SMID	1% ¹
Growth & Income	U.S. Large-cap Stocks	S&P 500	18%
	Developed Int'l Large-cap Stocks	MSCI EAFE	7%
	U.S. Investment-grade Bonds	Bloomberg US Aggregate	51%
Income	International Bonds	Bloomberg Global Agg Ex USD Hgd	4%
	U.S. High-yield Bonds	Bloomberg US HY 2% Issuer Cap	6%
	International High-yield Bonds	Bloomberg Emerging Market USD Aggregate	3%
Cash	Cash	Bloomberg US Trsy Bellwethers 3Mon	1%

Sources: S&P, MSCI, Russell, FTSE, Bloomberg

* Index performance covers the dates 1/1/1990-12/31/2021 unless noted otherwise.

¹ For periods prior to 2001, the S&P Developed Ex-U.S. Small-cap Index was used.

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Diversification does not guarantee a profit or protect against loss.

Past performance is not a guarantee of future results. An index is unmanaged and is not available for direct investment.

Expected annual returns are reduced by estimated internal expenses by asset class, however, may not include payment of all expenses, fees, or sales charges that a client can experience, which would lower the performance results.

The expected range of returns in any one-year calculation incorporates +/- 2 standard deviations.

Portfolio objective: Income focus

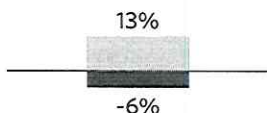
Our long-term outlook

This outlook is based on our long-term return expectations for this portfolio objective in most market environments.

Expected average annual return

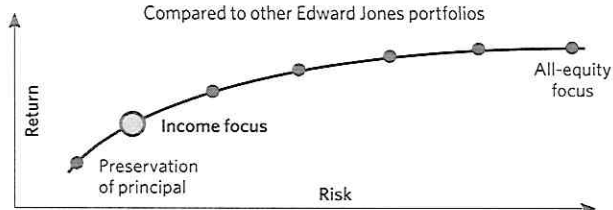
3.0%-5.0%

Expected range of returns in any one year



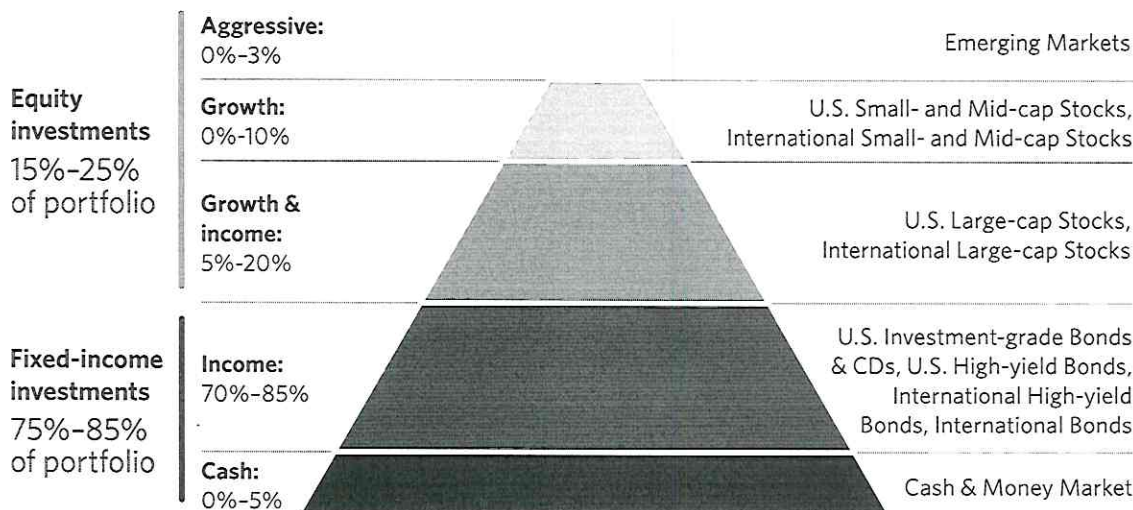
Relative risk and return

Compared to other Edward Jones portfolios



How to build this portfolio

We recommend using the following ranges of investment categories and asset classes as a guide when selecting investments to build this portfolio.



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This portfolio objective:

Emphasizes current interest income with little long-term growth and rising dividend potential.

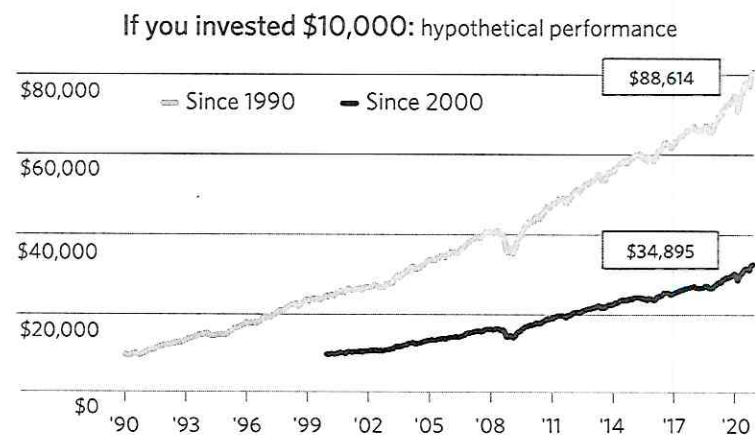
Over the long term, should have lower risk than portfolios with a more growth-oriented objective.

Is expected to have significantly smaller fluctuations in value and significantly lower long-term return potential than the stock market.

Holds approximately 5%-25% in international investments and no more than 20% in high-yield bonds or other aggressive-income investments.

A historical perspective

What this portfolio's recommended mix of investments could have experienced since 1990:



Taking a look back: 1990-2021



Past performance is no guarantee of future results. Results rounded to the nearest \$100. See Page 2 for more information on how historical performance is calculated.

Portfolio objective: Income focus

A historical perspective

Past performance does not guarantee future results. But reviewing historical performance can provide some perspective when determining whether the portfolio aligns with your comfort level with risk and your overarching goals. This section highlights the hypothetical performance our recommended allocation for this objective could have experienced since 1990, using the allocations and indexes below to represent different asset classes.

Allocations and indexes used to calculate historical performance

Investment Category	Asset Class	Index	Weight%*
Aggressive	Emerging-market Stocks	MSCI Emerging Markets	2%
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Growth	U.S. Small-cap Stocks	Russell 2000	1%
	Developed Int'l Small- and Mid-cap Stocks	MSCI EAFE SMID	1% ¹
	U.S. Large-cap Stocks	S&P 500	10%
Growth & Income	Developed Int'l Large-cap Stocks	MSCI EAFE	3%
	U.S. Investment-grade Bonds	Bloomberg US Aggregate	62%
	International Bonds	Bloomberg Global Agg Ex USD Hgd	5%
Income	U.S. High-yield Bonds	Bloomberg US HY 2% Issuer Cap	8%
	International High-yield Bonds	Bloomberg Emerging Market USD Aggregate	4%
Cash	Cash	Bloomberg US Trsy Bellwethers 3Mon	1%

Sources: S&P, MSCI, Russell, FTSE, Bloomberg

* Index performance covers the dates 1/1/1990-12/31/2021 unless noted otherwise.

¹ For periods prior to 2001, the S&P Developed Ex-U.S. Small-cap Index was used.

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The expected range of returns in any one-year calculation incorporates +/- 2 standard deviations.

SCHOOL VISIT REVIEW REPORT

School: Royal Palm Charter School

Prepared By:

Brevard Public Schools

Leading & Learning

School Board of Brevard County 2700
Judge Fran Jamieson Way
Viera, FL 32940

Phone: 321-633-1000

Fax: 321-877-0914

Released By:

Melinda Maier on April 25, 2022

Signed By:

1. School Mission and Innovative Design

Visit Date :02/22/2022

1.1	<p>The school implements its mission and the innovative design elements in the approved charter and any subsequently approved amendments. Note: Innovative design elements are elements of the school, originally articulated in the charter application or subsequent amendments that make it unique and distinct from other district or charter schools, while still being consistent with the state education goals established by Florida Statute 1000.03(5).</p> <p>Monitor Comments: Charter Innovation: Core Knowledge School</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:00 AM</p>	Yes
1.2	<p>The school is meeting/making progress toward the goals established in the charter or in the annual Academic Achievement Goals as outlined in the charter. (These goals will be reviewed during the visit, but the actual rating for this benchmark will not be finalized until the end of the school year.)</p> <p>Monitor Comments: The school is using a year-round calendar where they have 9 weeks of school and then a 3 week break.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:02 AM</p>	Yes
1.3	<p>The school is meeting/making progress toward the goals established in the annual School Improvement Plan. (These goals will be reviewed during the visit, but the actual rating for this benchmark will not be finalized until the end of the school year.)</p> <p>Monitor Comments: The school is making progress toward the goals set forth in the School Improvement Plan.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:05 AM</p>	Yes
1.4	<p>Commendations</p> <p>Monitor Comments: Royal Palm Charter School stands by its mission and implements a Core Knowledge Program. The school also utilizes Stem Scopes for science.</p>	<p>Reviewed by Melinda Maier on 2/28/2022 2:00 PM</p>	Not Applicable
1.5	<p>Recommendations</p>	<p>Reviewed by Melinda Maier on 2/28/2022 2:00 PM</p>	Not Applicable

2. Governance

Visit Date: 02/22/2022

2.1	<p>All governing board members have a current board disclosure form (updated within the last year). Copies of all disclosure forms are on file at the school.</p> <p>Monitor Comments: Royal Palm Charter School is governed by a board consisting of 5 members.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:16 AM</p>	Yes
2.2	<p>All governing board members have been fingerprinted and documentation is on file at the school.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:16 AM</p>	Yes
2.3	<p>All governing board members have participated fully in the FDOE requirement board training. (SBE Rule 6A-6.0784)</p> <p>Monitor Comments: All Board members have a certificate of completion of training.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:16 AM</p>	Yes
2.4	<p>Announcements for upcoming board meetings are publicly noticed and are posted in a public location at the school.</p> <p>Monitor Comments: Board meeting dates and times are advertised at the school, and on the school website.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:16 AM</p>	Yes
2.5	<p>A set of documents, organized chronologically, include governing board announcements, meeting agendas and minutes signed and dated by the chairperson or board secretary, and are readily accessible.</p> <p>Monitor Comments: The school has all documents filed in an organized manner.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:18 AM</p>	Yes
2.6	<p>There is evidence of at least two public meetings held in the district during the school year. These meetings are held at a location and time when stakeholders, including parents and community members, can attend the meetings.</p> <p>Monitor Comments: The school has 5 public meetings scheduled during the school year.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:18 AM</p>	Yes
2.7	<p>The governing board receives monthly financial reports, as evidenced in the board minutes.</p> <p>Monitor Comments: The board is presented with financial reports and is evidenced in the Board Meeting minutes.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:18 AM</p>	Yes

Visit Review Report for Royal Palm Charter School

2.8	<p>The governing board approves the annual budget, all budget amendments, and all purchases over an agreed-upon dollar amount, as evidenced in board policy and demonstrated in the board minutes.</p> <p>Monitor Comments: The board meeting minutes prove that the board approves the annual budget.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:18 AM</p>	Yes
2.9	<p>The school administrator is evaluated annually by the governing board and evidence is provided. (Most recent performance evaluation is available at the school.)</p> <p>Monitor Comments: The school utilizes Brevard Public School's evaluation tool to evaluate the administrator.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:20 AM</p>	Yes
2.10	<p>The state-required Charter School Annual Accountability Report was submitted on time and was accurate and complete.</p> <p>Monitor Comments: The Charter School Annual Accountability report has just opened for submissions.</p>	<p>Reviewed by Melinda Maier on 2/22/2022 9:20 AM</p>	In process
2.11	<p>Commendations</p> <p>Monitor Comments: The governing board members are trained, and they hold meetings in a public location.</p>	<p>Reviewed by Melinda Maier on 2/28/2022 2:15 PM</p>	Not Applicable
2.12	Recommendations	<p>Reviewed by Melinda Maier on 2/28/2022 2:15 PM</p>	Not Applicable

3. Health, Safety and Welfare

Visit Date: 02/22/2022

3.1	A safety and emergency plan has been written and is on file at the school.	Reviewed by Melinda Maier on 2/22/2022 9:22 AM	Yes
3.2	The school has evidence that it has conducted Active Shooter Drills as required by law.	Reviewed by Melinda Maier on 2/22/2022 9:22 AM	Yes
3.3	A copy of the annual Fire Safety Inspection is on file at the school.	Reviewed by Melinda Maier on 2/22/2022 9:22 AM	Yes
3.4	A copy of the annual County Health Department sanitation inspection is on file at the school.	Reviewed by Melinda Maier on 2/22/2022 9:22 AM	Yes
3.5	A copy of the current building floor plans including all rooms, corridors, doors, windows, and fire exits are posted in every occupied room. All rooms are labeled, and a Fire Exiting Path is indicated for each occupied space.	Reviewed by Melinda Maier on 2/22/2022 9:00 AM	Yes
3.6	Fire drills are performed monthly. Logs are on file at the school. Note: The school is required to perform a fire drill in the first and second weeks of school, in addition to its monthly drills (FL Fire Prevention Code).	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.7	There is documentation that all volunteers have been properly screened and cleared to work with students. Monitor Comments: The school uses the Raptor system for volunteers.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.8	There is a sign-in and sign-out process for visitors, including volunteers and outside staff.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.9	All property is annually inventoried, and the inventory record submitted to the district is current. The reviewer will conduct a spot check of the school's property inventory. Monitor Comments: The school has submitted a property inventory and a spot check in the principal's office was completed.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.10	A copy of the School's Bio-Hazard Plan is on file at the school and there is evidence that key personnel have been appropriately trained.	Reviewed by Melinda Maier on 2/22/2022 9:30 AM	Yes
3.11	Current emergency contact information for a student is on file, and it includes medical information, medical provider preferences and authorized adult contact persons.	Reviewed by Melinda Maier on 2/22/2022 9:30 AM	Yes

3.12	Medication is counted and a log is maintained that includes the date, time, and quantity. The log is initialed by the trained staff member conducting the count.	Reviewed by Melinda Maier on 2/22/2022 9:30 AM	Yes
3.13	Medications are kept in a locked, secure location. Key is accessible to assigned staff only. Key is Not accessible to students, unauthorized personnel, parents, or visitors.	Reviewed by Melinda Maier on 2/22/2022 9:30 AM	Yes
3.14	A log of the administration of prescribed medications includes date, time and dosage administered, and is initialed by the trained staff member.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.15	A log of student visits to the clinic includes date, time, and reason for visit and outcome, and is initialed by trained staff assigned to monitor the clinic.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.16	There is documentation that parents are notified of clinic visits which includes date, time, and reason for visit and outcome.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.17	There is documentation that all students with health concerns, allergies, etc. have been identified, confidentiality has been maintained, and all staff who have a need to know have been informed.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.18	A list of staff certified in CPR is available onsite and is easy to access in case of an emergency.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.19	The school has an automated external defibrillator (AED machine) available in case of an emergency. Monitor Comments: Royal Palm Charter School as an AED machine in the front office.	Reviewed by Melinda Maier on 2/22/2022 9:25 AM	Yes
3.20	The school has completed the FSSAT on time. Monitor Comments: Royal Palm Charter School completed the FSSAT on September 30, 2021 and was approved.	Reviewed by Melinda Maier on 2/28/2022 2:25 PM	Yes
3.21	The school maintains a safe -school officer contracted daily while students are present on campus	Reviewed by Melinda Maier on 2/22/2022 9:28 AM	Yes
3.22	Commendations Monitor Comments: Student's health and safety is a top priority to Royal Palm Charter School. They utilize Renweb for documentation of nurse visits for students.	Reviewed by Melinda Maier on 2/28/2022 2:45 PM	Not Applicable
3.23	Recommendations	Reviewed by Melinda Maier on 2/28/2022 2:45 PM	Not Applicable

4. Human Resources

Visit Date: 02/22/2022

4.1	Staff contracts, resumes, job descriptions and salaries are on file.	Reviewed by Melinda Maier on 2/22/2022 9:27	Yes
4.2	All employees have been fingerprinted at the District School and Security office, Brevard Public Schools, and verification is on file at the school.	Reviewed by Melinda Maier on 2/22/2022 9:27	Yes
4.3	Teachers are in compliance with state and federal certification requirements and certificates are on file. Monitor Comments: At Royal Palm Charter School, one teacher is out-of-field.	Reviewed by Melinda Maier on 2/22/2022 9:30	Yes
4.4	Teachers assigned to teach out-of-field have been submitted for the charter school governing board for approval. Monitor Comments: The School Board at Royal Palm Charter School has approved ESOL and out-of-field teachers.	Reviewed by Melinda Maier on 2/22/2022 9:30	Yes
4.5	Out-of-field teachers are in compliance with previous out-of-field assignments.	Reviewed by Melinda Maier on 2/22/2022 9:30	Yes
4.6	The school has evidence that parents have received proper out-of-field notification prior to the FTE survey period.	Reviewed by Melinda Maier on 2/22/2022 9:30	Yes
4.7	If the charter school is contracting with outside agencies for ESE services, the contract is on file at the school. (These include Speech/Language Pathologists, Physical Therapists and Occupational Therapists.)	Reviewed by Melinda Maier on 2/22/2022 9:30	Yes
4.8	The qualifications of the teachers have been disclosed to the parents. [1002.33(12)(f), F.S.]	Reviewed by Melinda Maier on 2/22/2022 9:30	Yes
4.9	Training/Staff Development activities, outside of what is offered by the district through ProGOE, have been documented, including topic, date, and list of participants. Monitor Comments: Franklin Covey offers professional development to teachers at Royal Palm Charter School and the information is correctly submitted into ProGOE.	Reviewed by Melinda Maier on 2/22/2022 9:30	Yes
4.10	Commendations Monitor Comments: Royal Palm Charter School takes necessary steps to make sure all teachers are licensed and if they are out of field, they ensure the teacher is working toward the correct licensure.	Reviewed by Melinda Maier on 3/1/2022 8:15	Not Applicable
4.11	Recommendations	Reviewed by Melinda Maier on 3/1/2022 8:15	Not Applicable

5. Registration, Record Keeping and Student Record Management

Visit Date: 02/22/2022

5.1	<p>Cumulative records are maintained for every student and include pertinent documents such as birth certificates, up to date immunization records and physicals, etc. These records are stored in a locked, fireproof file cabinet in a secure location.</p> <p>Monitor Comments: Royal Palm Charter School is very organized with their cumulative records.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:00</p>	Yes
5.2	<p>There is a list of personnel authorized to access records posted in the records area.</p> <p>Monitor Comments: Access to records is limited and there is a list provided.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:00</p>	Yes
5.3	<p>There is an access log in each student's file.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:00</p>	Yes
5.4	<p>A log of record requests is maintained for both incoming and outgoing records. The log includes the date of request, person and school making the request, date record was sent and to whom, or date record was received and by whom.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:00</p>	Yes
5.5	<p>The school uses an application form that ensures program access and equity for all students eligible to attend the school. (Please have copies of the school's application available for the reviewer)</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:02</p>	Yes
5.6	<p>Lottery process and documentation are available (if applicable).</p> <p>Monitor Comments: Royal Palm Charter School submitted the lottery process and results on September 7, 2021.</p>	<p>Reviewed by Melinda Maier on 3/1/2022 8:35</p>	Yes
5.7	<p>The school uses an enrollment form and process that ensures program access and equity for all students. (Please have copies of the school's registration packet available for the reviewer)</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:03</p>	Yes
5.8	<p>Attendance records are entered appropriately in AS400.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:03</p>	Yes
5.9	<p>Discipline records are maintained and are appropriately entered into AS400.</p> <p>Monitor Comments: Royal Palm Charter School maintains accurate discipline records.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:03</p>	Yes

5.10	There is documentation that parents are notified of discipline concerns (e.g., phone logs, referral, etc.).	Reviewed by Rachel Roberts on 2/22/2022 9:04	Yes
5.11	There is evidence of any involuntary withdrawal of a student (i.e. not offer a seat for the upcoming school year). All evidence must be in accordance with the Student Code of Conduct, Charter Contract, and applicable Due Process Rights laws.	Reviewed by Rachel Roberts on 2/22/2022 9:04	Yes
5.12	Recommendations	Reviewed by Rachel Roberts on 3/3/2022 11:00	Not Applicable
5.13	Commendations Monitor Comments: Royal Palm Charter School is very organized with student records and registration. The record keeping is up to date and the school has proper documentation.	Reviewed by Rachel Roberts on 3/3/2022 11:00	Not Applicable

6. Curriculum and Instructional Strategies

Visit Date: :02/22/2022

6.1	<p>Teacher lesson plans address BEST Standards, ELL, ESE/504, differentiated instruction, and small group.</p> <p>Monitor Comments: Royal Palm Charter School provided thorough lesson plans which address BEST standards and had ESE accommodations listed.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:05</p>	Yes
6.2	<p>The curriculum and instructional strategies for reading are consistent with state standards and grounded on scientifically based research.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:05</p>	Yes
6.3	<p>Resources are being utilized to identify and give specialized instruction for students who are reading below grade level.</p> <p>Monitor Comments: Royal Palm Charter School utilizes NEWA MAP for reading progress monitoring.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:05</p>	Yes
6.4	<p>There is evidence that the reading curriculum has differentiated strategies that will be used for students reading at grade level, below grade level, and above grade level.</p> <p>Monitor Comments: Royal Palm Charter School places different strategies within their lesson plans for students at different reading levels.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:05</p>	Yes
6.5	<p>Evidence that PMPs or other progress monitoring for possible retention students have been communicated to parents and are being implemented with fidelity.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:05</p>	Yes
6.6	<p>There is evidence that parents/guardians have been informed of guidelines for mandatory retention of third grade students.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:05</p>	Yes
6.7	<p>All 12th grade students have an accurate Graduation Plan in place.</p> <p>Monitor Comments: Royal Palm Charter School does not have any twelfth graders.</p>	<p>Reviewed by Rachel Roberts on 2/22/2022 9:05</p>	Not Applicable
6.8	<p>Commendations</p> <p>Monitor Comments: Royal Palm has a challenging curriculum, and they motivate all students. Royal Palm also implements strategies to help struggling students.</p>	<p>Reviewed by Rachel Roberts on 3/3/2022 11:30</p>	Not Applicable
6.9	<p>Recommendations</p>	<p>Reviewed by Melinda Maier on 3/3/2022 11:30</p>	Not Applicable

7. Assessment and Program Evaluation

Visit Date: 02/22/2022

7.1	A test coordinator is identified at the school. Monitor Comments: Royal Palm Charter School has an appointed testing coordinator.	Reviewed by Rachel Roberts on 2/22/2022 9:10	Yes
7.2	There is evidence that the test coordinator has received training in administering standardized tests.	Reviewed by Rachel Roberts on 2/22/2022 9:10	Yes
7.3	The school's testing material is stored in a secure location.	Reviewed by Rachel Roberts on 2/22/2022 9:10	Yes
7.4	There is documentation of instructional staff testing administration training.	Reviewed by Rachel Roberts on 2/22/2022 9:10	Yes
7.5	Students participate in all age-appropriate state assessment programs as evident by the percent (%) tested. Monitor Comments: Royal Palm Charter School had 99% of their students tested in 2020-21 School Year.	Reviewed by Melinda Maier on 3/1/2022 10:23	Yes
7.6	Students state assessment results are shared with teachers and parents/guardians.	Reviewed by Rachel Roberts on 2/22/2022 9:10	Yes
7.7	Parents/guardians are informed of student progress through quarterly progress reports and report cards.	Reviewed by Rachel Roberts on 2/22/2022 9:10	Yes
7.8	Commendations Monitor Comments: Royal Palm Charter School attends all training for testing through BPS and takes the responsibility of testing requirements seriously. They keep all testing materials in a locked cabinet.	Reviewed by Melinda Maier on 3/1/2022 9:15	Not Applicable
7.9	Recommendations	Reviewed by Melinda Maier on 3/1/2022 9:15	Not Applicable

8. Multi-Tiered System of Support (MTSS)

Visit Date: 02/22/2022

8.1	There is a designated staff member to review all incoming student records for 504, ESE, PMP and/or LEP eligibility. Monitor Comments: Ms. Turbush is the ESE Coordinator at Royal Palm Charter School.	Reviewed by Rachel Robertson 2/22/2022 9:23	Yes
8.2	There is a process for notifying the appropriate staff and implementing needed procedures, interventions or educational plans for incoming students already identified as 504, ESE, PMP, LEP or IEP.	Reviewed by Rachel Roberts on 2/22/2022 9:23	Yes
8.3	There is an MTSS documentation process in place for providing developmentally appropriate interventions for students who begin to exhibit a pattern of difficulty with academics, behavioral and attendance.	Reviewed by Rachel Roberts on 2/22/2022 9:23	Yes
8.4	Procedures are in place for determining eligibility and placement in the least restrictive environment and the provision of special education and related services to Exceptional Student Education students, including gifted.	Reviewed by Rachel Roberts on 2/22/2022 9:28	Yes
8.5	Commendations Monitor Comments: The School has an effective MTSS process, and they meet biweekly to address the needs of the students.	Reviewed by Rachel Roberts on 3/3/2022 12:00	Not Applicable
8.6	Recommendations	Reviewed by Melinda Maier on 3/3/2022 12:00	Not Applicable

9. Exceptional Student Education (ESE)

Visit Date: 02/22/2022

9.1	Lesson plans reflect appropriate instruction for students and/or accommodations.	Reviewed by Rachel Roberts on 2/22/2022 9:55	Yes
9.2	Exceptional Student Education records are maintained in a secure location in accordance with the law.	Reviewed by Rachel Roberts on 2/22/2022 9:55	Yes
9.3	There is evidence that personnel are trained in IEP development (PEER).	Reviewed by Rachel Roberts on 2/22/2022 9:55	Yes
9.4	Exceptional Student Education and related services are being delivered as indicated on students IEPs, 504 and AS400 schedules.	Reviewed by Rachel Roberts on 2/22/2022 9:55	Yes
9.5	254/255 (if applicable): There is a matrix of service form completed for every IEP that earned a matrix level of 254 or 255 (Domains reflect level of service; Access points, where applicable).	Reviewed by Rachel Roberts on 2/22/2022 9:55	Yes
9.6	All Exceptional Student Education (ESE) Files were up to date and in compliance with ESE compliance audit guidelines.	Reviewed by Rachel Roberts on 2/22/2022 9:55	Yes
9.7	10-day notice is given to parent/guardian to attend IEP's and Child Study Team Meetings.	Reviewed by Rachel Roberts on 2/22/2022 10:00	Yes
9.8	Commendations Monitor Comments: Royal Palm Charter School does an excellent job with the ESE files. They were organized and contained all needed documents. Services are delivered to the students as indicated on the student's plan. .	Reviewed by Melinda Maier on 3/3/2022 12:20	Not Applicable
9.9	Recommendations	Reviewed by Melinda Maier on 3/3/2022 12:20	Not Applicable

10. English Speakers of Other Languages (ESOL)

Visit Date: :02/22/2022

10.1	Identification and Placement: The school is meeting all requirements to ensure compliance with the META Consent Decree and the District ELL Plan for determining student eligibility and placement within the mandated timeline (Home Language Survey, Parent Notification of Testing Procedures, IPT Screener, Programmatic Assessment, Eligibility Letter).	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.2	Monitoring: All ELL students (LY and LF) have an updated ELL monitoring folder (self-audit completed yearly, plan date updated, schedule, eligibility documents, copy of annual assessment (CELLAWIDA), continuation of services letter, ELL committee minutes).	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.3	Monitoring: The school has assigned set personnel for the following roles: ESOL Contact; ELL Committee	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.4	Staffing: There is evidence of administrative monitoring of ESOL certification/endorsement (certification report, out of field board approval and notification to parents prior to Survey 2).	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.5	Staffing: The school follows staffing mandates and district guidelines regarding ESOL teachers and assistants.	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.6	Instructional Support: ESOL accommodations are in place and documented in lesson plans.	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.7	Parent Communication & Participation: ESOL parents are provided timely communication regarding student placement and progress (eligibility, continuation, ELL Committee, retention, assessments, etc.).	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.8	Parent Communication & Participation: ESOL parent participate in all school processes, procedures, and events with language support provided whenever feasible.	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.9	Title III: All Title III federal materials are labeled and inventoried.	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.10	Audit Binder: ESOL contact maintains a yearly audit binder documenting the various program components for district/state reviews.	Reviewed by Rachel Roberts on 2/22/2022 10:05	Yes
10.11	Commendations Monitor Comments: Royal Palm Charter School has an excellent ESOL binder and the school places emphasis on organization.	Reviewed by Rachel Roberts on 3/3/2022 12:40	Not Applicable
10.12	Recommendations	Reviewed by Rachel Roberts on 3/3/2022 12:40	Not Applicable

11. Family Engagement

Visit Date: 02/22/2022

11.1	There is evidence of parents/guardian's involvement (i.e., volunteer logs). Monitor Comments: At Royal Palm Charter School, volunteers are in the classroom helping.	Reviewed by Melinda Maier on 2/22/2022 9:40	Yes
11.2	School Improvement Plan is available to parents.	Reviewed by Melinda Maier on 2/22/2022 9:40	Yes
11.3	The school maintains a website that enables the public to obtain information regarding the school, including the school's academic performance, the names of the governing board members, the programs at the school, any management companies, service providers, or education management corporations associated with the school, the school's annual budget, the school's fiscal audit, the school's grade pursuant to §1008.34, F.S., the minutes of governing board meetings.	Reviewed by Melinda Maier on 3/1/2022 10:30	Yes
11.4	Commendations Monitor Comments: Royal Palm Charter School has an easy to navigate website. The School Improvement Plan is located on the website and a link is sent to the parents in a newsletter.	Reviewed by Melinda Maier on 3/1/2022 10:30	Not Applicable
11.5	Recommendations	Reviewed by Melinda Maier on 3/1/2022 10:30	Not Applicable

12. Transportation

Visit Date: 02/22/2022

12.1	This charter school has on file information regarding all students transported by school bus.	Reviewed by Melinda Maier on 2/22/2022 9:48	Not Applicable
12.2	This charter school has on file information related to any situation where a parent or other driver is contracted by the school to provide student transportation.	Reviewed by Melinda Maier on 2/22/2022 9:49	Not Applicable
12.3	This charter school has on file evidence that any vehicle which is owned or leased by the school and is used to transport students is certified and properly insured. There is documentation that the bus driver has current certification and that the required camera(s) are in the buses.	Reviewed by Melinda Maier on 2/22/2022 9:49	Not Applicable
12.4	This charter school has documentation of bus evacuation drills for October and/or February as appropriate.	Reviewed by Melinda Maier on 2/22/2022 9:52	Not Applicable
12.5	This charter school has documentation of monthly inspections of bus(es) owned by the school.	Reviewed by Melinda Maier on 2/22/2022 9:52	Not Applicable
12.6	<p>Commendations</p> <p>Monitor Comments: Royal Palm Charter School does not provide transportation for their students.</p>	Reviewed by Melinda Maier on 3/01/2022 11:50	Not Applicable
12.7	Recommendations	Reviewed by Melinda Maier on 3/01/2022 11:50	Not Applicable

13. Title 1 (If Applicable)

Visit Date: 02/22/2022

13.1	Title I teachers and Instructional Assistants are in compliance with staffing plan and aligned to schedules.	Reviewed by Joann Hall and Dan Keane on 2/22/2022 9:45	Yes
13.2	The Title I Parent Notebook offers parents in a Title I school the right to review all teachers and paraprofessionals qualifications required in Every Student Succeeds Act (ESSA). This notebook must also contain other Title I program documentation that must be readily available to parents such as notification of school report card, approved school improvement plan, etc. Monitor Comments: Use audit folder #10 to guide contents.	Reviewed by Joann Hall and Dan Keane on 2/22/2022 10:20	Yes
13.3	Title I audit folder document review. The school must have evidence of a process of conducting an annual comprehensive needs assessment. Evidence of meetings and the data reviewed during this process must be contained in the audit folder.	Reviewed by Joann Hall and Dan Keane on 2/22/2022 10:40	Yes
13.4	The school must have a working form of the Mandatory Notifications for New Students to ensure that all incoming students are receiving required documents.	Reviewed by Joann Hall and Dan Keane on 2/22/2022 9:45	Yes
13.5	Commendations Monitor Comments: Title I Tools is kept up to date.	Reviewed by Joann Hall and Dan Keane on 2/22/2022 12:45	Not Applicable
13.6	Recommendations	Reviewed by Joann Hall and Dan Keane on 2/22/2022 12:45	Not Applicable

14. Student Handbook

Visit Date: 02/22/2022

14.1	The Student-Parent Handbook informs parents that medication that must administered at school must be hand-delivered by the parent or other authorized adult and must be in its original prescription bottle. Written permission from the parent authorizing the school to administer the medication must be provided.	Reviewed by Melinda Maier on 3/1/2022 12:48	Yes
14.2	The school's Student-Parent Handbook addresses attendance requirements, excused absences, and procedures for parents to follow regarding excused absences.	Reviewed by Melinda Maier on 3/1/2022 12:48	Yes
14.3	The school's Student-Parent Handbook addresses the District's Code of Conduct, in addition to the school's unique Code of Conduct as described in the approved application.	Reviewed by Melinda Maier on 3/1/2022 12:50	Yes
Monitor Comments: Royal Palm Charter School utilizes BPS handbook as the adopted handbook for the school.			

15. Review of Non-compliance (If Applicable)

Visit Date: 02/22/2022

15.1	Total number of notices sent to school in current school year	Reviewed by Melinda Maier on 3/01/2022 2:30	none
15.2	Current compliance status on Charter Tools Monitor Comments: Royal Palm Charter School's compliance status is compliant.	Reviewed by Melinda Maier on 3/01/2022 2:30	Compliant
15.3	Commendations Monitor Comments: Royal Palm Charter School does a great job with compliance and currently has a 98% compliance score.	Reviewed by Melinda Maier on 3/01/2022 2:30	Not Applicable
15.4	Commendations		
15.5	Recommendations		
15.6	Recommendations		



Brevard Public Schools

Royal Palm (6509)
Charter School Annual Report

May
2022

7145 Babcock Street S.E., Palm Bay, FL
(321) 723-0650

Grades Served: K-8

For more information:

<http://www.royalpalmcharter.com/>

School Leader: Shannon Sviben

Contact Info:

shannon.shupe@royalpalmcharter.com

Board President: Lori Grodecky

Contact Info:

lorigrodecky@yahoo.com

Charter Innovation: Year Round
School

Initial School Year: 2000-21

Term of Contract: 15 years

Contract Expiration: 06/30/2031

Title I Status: Yes

**High Performing
School Designation:**

NO

Designation from the FLDOE based
on school grades and results of
annual financial audits

Corrective Action Plan:

NO

A charter school is put on a corrective
action plan for additional monitoring
of academic, financial or operational
deficiencies.

Financial Emergency Status:

NO

A charter school is deemed in finan-
cial emergency status by the
Commissioner of Education if it fails
to make certain payments as outlined
in state statute.

State Grade/School Improvement Rating:

2020-2021

N/A

2019-2020

N/A

2018-2019

C

2017-2018

C

School grades are part of Florida's accountability system that provide an easily understandable metric to measure the performance of a school and how well each school is serving its students.

Student Demographics:

Enrollment

2021-2022

332

2020-2021

320

2019-2020

344

2018-2019

335

Subgroups (current year)

Economically Disadvantaged (ED)

68.4%

Students w/Disabilities (SWD)

14.5%

English Language Learners (ELL)

*

Race/Ethnicity (current year)

American Indian/AK Native

*

Asian

*

Black/African American

17.2%

Hispanic

17.5%

Multi Racial

6.3%

Pacific Islander

*

White

58.1%

Data are suppressed when the total number of students within a subgroup (across all categories) is less than 10 and is noted by an asterisk ().

Academic Performance

Student Proficiency (%)

	2020-2021	2018-2019	2017-2018
ELA	55%	58%	50%
Math	46%	50%	48%
Science	39%	35%	47%
Social Studies	N/A	81%	71%

Learning Gains (%)

	2020-2021	2018-2019	2017-2018
ELA (All)	56%	47%	52%
ELA (Lowest 25%)	52%	33%	43%
Math (All)	46%	48%	49%
Math (Lowest 25%)	26%	41%	47%

Subgroup Proficiency (%)

	2019-2020				2018-2019				2017-2018			
	ELA	Math	Science	Social Studies	ELA	Math	Science	Social Studies	ELA	Math	Science	Social Studies
ED	N/A	N/A	N/A	N/A	57%	48%	26%	82%	52%	45%	43%	75%
ELL	N/A	N/A	N/A	N/A	*	*	*	*	*	*	*	*
SWD	N/A	N/A	N/A	N/A	27%	30%	*	*	35%	35%	*	*

Data are suppressed when the total number of students within a subgroup (across all categories) is less than 10 and is noted by an asterisk ().

Operational Compliance

2021-2022 Compliant (95%) as of 5/12/22

2020-2021 Compliant (93%)

2019-2020 Compliant (90%)

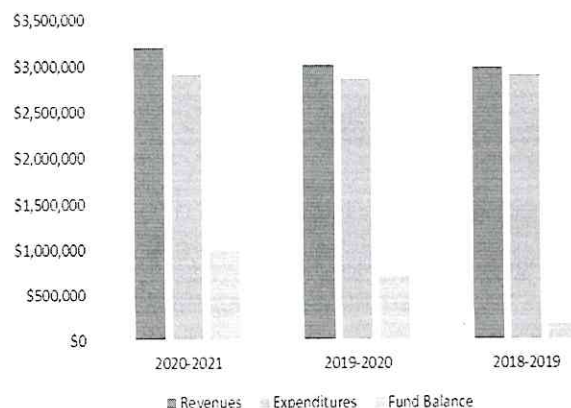
2018-2019 Non-Compliant (54%)

The Compliance Rating is based on the timelines and completeness of the school's compliance with the charter contract, certain local, state and federal legal requirements, and directives/regulations issued by the FLDOE or similar jurisdictional agencies as calculated by the District's online charter school compliance system, Charter Tools.

Financial Performance

Total Governmental Funds

	2020-2021	2019-2020	2018-2019
Revenues	\$3,205,607	\$3,007,647	\$2,979,980
Expenditures	\$2,905,032	\$2,855,227	\$2,897,369
Fund Balance	\$990,439	\$710,782	\$165,502



The table shows how much money the charter school received (revenue) and how much it spent (expenditures) in a given year. The fund balance represents what the charter school has in reserves. A negative fund balance indicates the school owes more than it has in reserves.

Enrollment Update as of 6/17/22

	22-23 Enrolled	Openings
VPK	30	0
K	36	0
1ST	35	1
2ND	36	0
3RD	36	0
4TH	40	4
5TH	44	0
6TH	24	1*
7TH	44	0
8TH	44	0
	369 (339)	

Strategic Planning 2022-23

Staff

Vega return to VPK/Noel Partner
 K Teacher - Jennifer Stimpson
 1st grade teacher - Elissa Gilbert
 3rd grade teacher - Jere Wilder
 4th Grade Teacher - Nanette Irizarry
 6th grade M/S - TBD - Brooke Steelman
 6th grade ELA - Madison Howard
 MS History - move Justin Clermont
 MS ELA - Monica Surrena
 ESE Teacher - move Theresa Steelman
 Gifted Only - Kerri Bolling
 Elem PE - Stefani Shafer
 MS PE - Vanessa Fish
 K/1 ESE/Teacher Asst - Suellen Mellott (Wright)
 1/2 Teacher Asst - Darlene McKendrick
 VPK Director - Karen Wright
 Cafeteria Manager - TBD
 Library/Music - TBD

Teacher Schedule

STEM instead of Music
 Additional PE Day OR Leadership Class instead of Library

Teacher Pay	46,800 Base & 2% increase for remainder	Teacher Salary Increase
Continue paying 100% employee benefits		
Continue longevity bonuses		
Renew app Observation System	1520	
Curriculum		
Brainpop Subscription	2550	
Discovery Ed Online Renewal		
Stemscopes	30,925	ESSER
Secret Stories	2,000	
Go Math Materials	52,000	ESSER
FL Ready		
Measure Up		
Edgenuity	22000	ESSER
NWEA (MAPS)	4375	ESSER
Learning A-Z	4593.6	
ESE Materials		
Pearson KTEA	720.5	
Multi Health Systems	425	
UPAR	7250	ESSER
IPADS	2500	ESSER
Materials		
Art Supplies	1000	
PE Supplies	1000	
Music Supplies	1000	
Social/Emotional		
Franklin Covey Materials/Renewal	25000	ESSER
Furniture		
Rocker Chairs		
Standing Tables		
Technology		
Laptop Cart	12,000	ESSER
Update Teacher Laptops	8500	ESSER
Training		
Secret Stories Phonics	5000	ESSER
CKLA k-5/Amplify ELA	20850	ESSER
Amplify ELA 6-8	10000	ESSER
Building		
Install Additional Security Cameras	2000	Safety & Security Grant
Purchase additional phones/lines	2000	
Repair Perimeter Fence		
Cut down brush around Perimeter	3,000	
Lunch		
Horizons Software System	5000	
	225689.1	

SPECIALS		Monday	Tuesday	Wednesday	Thursday	Friday A	Friday B
8:40-9:20	Rizzotti	STEM	PE	Art	PE	Leader	PE
8:40-9:20	Leedy	PE	STEM	PE	Art	PE	Leader
9:25-10:05	Wilder	STEM	PE	Art	PE	Leader	PE
9:25-10:05	Graham	PE	STEM	PE	Art	PE	Leader
10:15-10:55	Irizarry	STEM	PE	Art	PE	Leader	PE
10:15-10:55	Boneta	PE	STEM	PE	Art	PE	Leader
11-11:30	LUNCH						
11:35-12:15	Stimpson	STEM	PE	Art	PE	Leader	PE
11:35-12:15	Rexach	PE	STEM	PE	Art	PE	Leader
12:20-1:00	Philpott	STEM	PE	Art	PE	Leader	PE
12:20-1:00	Gilbert	PE	STEM	PE	Art	PE	Leader
1:05-1:45	Blank	PE	STEM	PE	Art	PE	Leader
1:05-1:45	Todd	STEM	PE	Art	PE	Leader	PE

**ROYAL PALM CHARTER SCHOOL
PRELIMINARY BUDGET
2022-2023**

ENROLLMENT	332
FUND BALANCE, BEGINNING	1,216,278
REVENUES	
FEFP	\$ 2,286,270
ESSER GRANT	459,315
Title 1	156,363
Capital outlay	188,739
Food service revenue	91,182
Before/After care	60,332
Sales surtax	259,720
Planners/fieldtrips/clubs/yearbook	17,133
TOTAL REVENUES	3,519,054
EXPENDITURES	
INSTRUCTION	
Classroom teachers	1,243,619
Total Instruction Salaries	1,243,619
Retirement	37,309
Payroll taxes	96,061
Health insurance	166,612
Workers compensation	6,785
Total Instruction Benefits	306,767
Contracted services	61,400
Textbooks & other curriculum materials	166,867
Travel	4,800
Supplies	15,000
Equipment	11,000
Substitutes	27,000
Total Instruction Other	286,067
Total Instruction	1,836,453

**ROYAL PALM CHARTER SCHOOL
PRELIMINARY BUDGET**

2022-2023

PUPIL PERSONNEL SERVICES

Guidance counselor	48,689
Total Pupil Personnel Services	48,689

Retirement	1,461
Payroll Taxes	3,763
Health Insurance	6,837
Workers compensation	292
Total Pupil Personnel Benefits	10,893

Supplies	250
Total Pupil Personnel Other	250
Total Pupil Personnel Services	59,831

INSTRUCTIONAL RELATED TECHNOLOGY

Technology support and service	64,000
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BOARD

Legal Fees	15,000
Contracted services - Audit	12,000
Insurance	30,000
Licenses & Fees	300
Total Board	57,300

**ROYAL PALM CHARTER SCHOOL
PRELIMINARY BUDGET
2022-2023**

SCHOOL ADMINISTRATION

Administration salaries	328,750
Total Administration Salaries	328,750

Retirement	9,863
Payroll Taxes	25,342
Health Insurance	35,026
Workers Compensation	1,973
Total Administration Benefits	72,202

Contracted services	68,691
Other purchased services	1,200
Supplies	10,000
Equipment	-
Dues and fees	31,036
Total Administration Other	42,236
Total School Administration	443,189

FOOD SERVICE

Food service workers	73,125
Total Food Service Salaries	73,125

Retirement	2,194
Payroll taxes	5,725
Health insurance	13,674
Workers compensation	585
Total Food Service Benefits	22,178

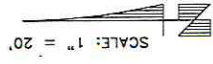
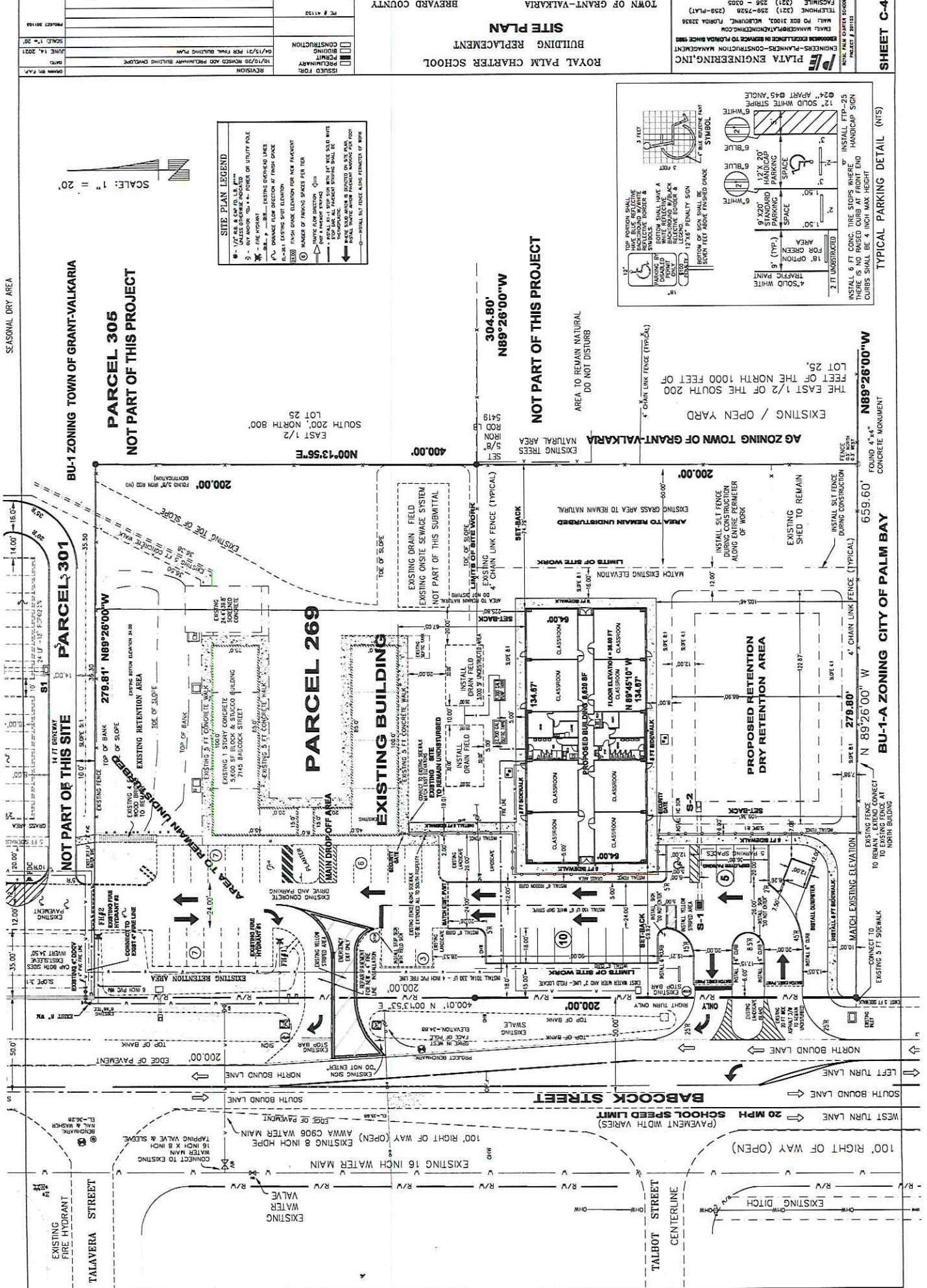
Contracted Services	65,488
Total Food Service Other	65,488
Total Food Service	160,791

**ROYAL PALM CHARTER SCHOOL
PRELIMINARY BUDGET**

2022-2023

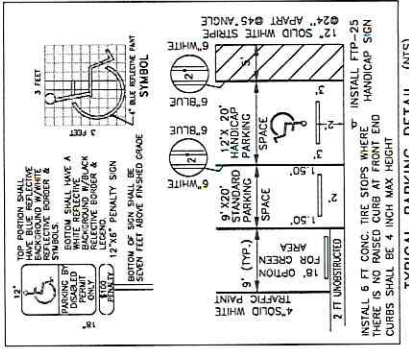
PLANT OPERATIONS	
Insurance	8,200
Other purchased services	65,000
Utilities	47,980
Supplies	13,500
Building and equipment	75,500
Total Plant Operations	210,180
PLANT MAINTENANCE	
Contracted services	10,500
COMMUNITY SERVICES	
Aftercare workers	67,700
Total Community Services Salaries	67,700
Retirement	2,031
Payroll taxes	2,770
Health insurance	6,837
Workers compensation	214
Total Community Services Benefits	11,852
Aftercare supplies	890
Equipment	13,000
Total Community Services Other	13,890
Total Community Services	93,442
DEBT SERVICE	
P&I Debt Service	233,496
Dues and fees	50,000
Principal & Interest New expansion (ESTIMATED)	100,000
	383,496
TOTAL EXPENDITURES	\$ 3,398,733
EXCESS REVENUE OVER EXPENDITURES	\$ 120,321
FUND BALANCE, ENDING	\$ 1,336,599

 6-22-22



SCALE: 1" = 20'

SITE PLAN LEGEND	
	EXISTING BUILDING
	PROPOSED BUILDING
	EXISTING PARKING
	PROPOSED PARKING
	EXISTING ROAD
	PROPOSED ROAD
	EXISTING UTILITY POLE
	PROPOSED UTILITY POLE
	EXISTING FIRE HYDRANT
	PROPOSED FIRE HYDRANT
	EXISTING WATER MAIN
	PROPOSED WATER MAIN
	EXISTING SEWER LINE
	PROPOSED SEWER LINE
	EXISTING STORM DRAIN
	PROPOSED STORM DRAIN
	EXISTING EASEMENT
	PROPOSED EASEMENT



TYPICAL PARKING DETAIL (N/S)

ROYAL PALM CHARTER SCHOOL
BUILDING REPLACEMENT
SITE PLAN

TOWN OF GRANT-VALKARIA
BREVARD COUNTY

SHEET C-4

FOUND 4"x4" CONCRETE MONUMENT

BU-1-A ZONING CITY OF PALM BAY

N 89°26'00" W

279.30'

659.60'

AG ZONING TOWN OF GRANT-VALKARIA

EXISTING / OPEN YARD

THE EAST 1/2 OF THE SOUTH 200 FEET OF THE NORTH 1000 FEET OF LOT 25.

AREA TO REMAIN UNDISTURBED

EXISTING TREES

304.80' N89°26'00"W

400.00'

NOO°13'56"E

EAST 1/2 SOUTH 200' NORTH 800' LOT 25

AREA TO REMAIN NATURAL DO NOT DISTURB

4" CHAIN LINK FENCE (TYPICAL)

SETBACK 14.15'

LIMITS OF SITE WORK

EXISTING DRAIN FIELD

EXISTING ON-SITE SEWAGE SYSTEM

NOT PART OF THIS SUBMITTAL

TO REMAIN UNDISTURBED

EXISTING 5 FT CONCRETE WALK

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AMERIS BANK

June 10, 2022

Royal Palm Charter School, Inc.
Attn: Ms. Shannon Sviben (Shupe), Principal
7135 Babcock St. SE
Palm Bay, Florida 32909

(Via Email)

Dear Shannon:

On behalf of Ameris Bank (hereinafter "Lender"), I am pleased to extend to you this Letter of Interest. A Letter of Interest is not a commitment to lend, but rather a detailing of the terms and conditions that we will attempt to obtain on your behalf.

TERMS & CONDITIONS

Borrower: Royal Palm Charter School, Inc.

Guarantor(s): N/A

Loan Amount: \$1,680,000.00

Loan Type: USDA Community Facilities Guaranteed Loan

Purpose: Demolish two existing buildings currently being used for classrooms located at 7147 (2,520 SF modular bldg) and 7155 (3,467 SF bldg currently not used) SE Babcock St., Grant-Valkaria, FL 32909 and cover all costs to construct one new 8,620 SF permanent replacement building for the same use.

Term: The Loan will have a term of 348 months from the note date. The first 12 months will be the construction period of the loan, the remaining 336 months will be the amortizing period of the loan.

Interest Rate: Wall Street Journal Prime Rate plus 1.5% floating, with adjustments every 3 years. If the loan were to close today, the initial interest rate would be 5.50%.

Interest shall be calculated on a 360-day basis, actual days lapsed.

Repayment: Interest-only payments for 12 months, followed by principal and interest payments for 336 months. If the loan were to close today and begin amortizing, the monthly principal and interest payment would be approximately \$9,889.78.

Prepayment Penalty: When, in any one of the first eleven years from the date of the initial disbursement, Borrower voluntarily prepays any amount of the outstanding principal balance of the loan, Borrower must pay to Lender a prepayment fee for that year as follows:

For the duration of the construction period of the loan - 10%, then

Upon conversion to the amortizing period of the loan the prepayment will be a declining amount over ten years equivalent to Year 1 – 10%; Year 2 – 9%; Year 3 – 8%; Year 4 – 7%; Year 5 -6%; Year 6 – 5%; Year 7 – 4%; Year 8 – 3%; Year 9 – 2% and Year 10 - 1%. After the tenth year of the amortizing period of the loan there will be no prepayment penalty.

Use of Proceeds: The loan proceeds, in addition to Borrower's injection, will be used as follows:

Use of Proceeds	Ameris Bank	Owner's Equity	Other	Total
Phase I work		218,427		218,427
Phase II Work:				
Construction	1,377,593			1,377,593
Contingency (5%)	68,880			68,880
Bond/Const Completion	43,394			43,394
Interest Reserve	71,746	20,000		
Construction Monitoring	24,108			24,108
Pre-Const. Items	94,279			
Ameris Bank Origination Fee		8,400		
USDA Guaranty Fee		20,160		
Closing Costs& 3rd Party Reports		43,186		43,186
Totals:	1,680,000	310,173		1,990,173
Percentages:	84.41%	15.59%	0.00%	100%

Out of Pocket Costs: If the loan does not close, all third-party expenses incurred on behalf of this loan request will be paid by Borrower. These expenses include (but are not limited to) attorney fees, appraisal fees, environmental assessment fees, etc.

Collateral: The loan will be secured by the following:
(Add Collateral Table Here if applicable)

Asset Type	Address	Lien Position
Commercial Real Estate	7135-7155 SE Babcock St., Grant-Valkaria, FL 32909	2nd
FF&E	7135-7155 SE Babcock St., Grant-Valkaria, FL 32909	2nd

Appraisal: A satisfactory appraisal ordered and reviewed by Lender will be required. Collateral will need to appraise for no less than \$3,885,000 and be acceptable to the Lender and USDA.

Environmental: A satisfactory Phase 1 Environmental Report and NEPA report to the satisfaction of USDA will be required.

Financial Feasibility: a satisfactory financial Feasibility report will be required. This may need to be prepared by an independent third party.

Life Insurance: N/A

Tax and Insurance: Borrower shall maintain liability, property, and other insurance as required. Lender will be named as Mortgagee/Loss Payee on all policies. Borrower must keep current all applicable property taxes.

Financial Reporting: Borrower will provide Lender with annual federal income tax returns and audited financial statements prepared in accordance with Generally Accepted Accounting Principles within 120 of each fiscal year end.

Other Conditions: This loan is being considered under the USDA Community Facilities Guaranteed Loan Program. In addition to the conditions set forth herein, this proposal is subject to and conditioned on the Lender's receipt of a USDA Guarantee of 80% of the loan amount. The USDA Conditional Commitment, if issued, may contain additional terms and conditions. All conditions applicable to both a USDA approval and an Ameris Bank approval must be met by the Borrower.

Borrower will be expected to execute all loan documents required by Lender and Lender's attorney.

Borrower may be required to maintain certain annual financial covenants for the life of the loan. These covenants will be calculated using the audited fiscal year end financial statements. Typical covenants include a minimum Debt Service Coverage ratio (DSC), a minimum Current Ratio, and a maximum Debt-to-Net Worth ratio.

The Loan will adhere to standard Ameris Bank construction loan requirements (including construction risk management by a third-party firm).

Time is of the Essence

Borrower agrees that time is of the essence regarding this transaction. Accordingly, Lender may use the funds collected as a part of this document for ordering standard / customary third-party reports. These reports may include (but are not limited to) appraisals, business valuations, title reports, construction budget reviews, etc.

Please indicate your preference below:

- ☐ Yes, I agree with the preceding paragraph and wish to have third-party reports ordered prior to loan approval.
- ☐ No, I do not agree to have third-party reports ordered in advance of loan approval. I understand that by waiving this option the time between loan approval and closing may be extended considerably (example: an appraisal typically takes 3-4 weeks from the ordering date to the completion date).

Initials of authorized signer: _____

Initial Deposit

Regardless of the above selection, Lender requires an expense deferral deposit ('EDD') of \$11,500 for preparing a loan presentation for submission to our loan committee. If the loan request is not approved on terms and conditions materially similar to those contained herein, the EDD will be refunded to you (less any out of pocket expenses incurred). If you withdraw your application prior to its presentation to loan committee – or if you decline to accept an approval letter that is materially similar to the terms contained herein - the EDD will

become fully earned and nonrefundable. If you accept an approval letter from us, the deposit will be credited to you at closing.

Lender Fees

Lender will charge a loan origination fee of ½% of the loan amount. This charge to the Borrower represents a reasonable amount for loan packaging services, which includes assisting Borrower with completing an USDA CF loan application and related documents. At closing, Lender will document the services provided. We are estimating this fee to be \$8,400 (but will be adjusted at closing to reflect ½% of the loan amount). It is itemized in the project cost grid on Page 2.

Disclaimer: While Borrower is not required to obtain or pay for unwanted services (such as a packaging fee), acceptance of this proposal constitutes a request for Lender to perform reasonable and customary services at market-rate costs.

If the terms of this letter are acceptable, please sign where indicated below, and remit the above-referenced EDD amount within 10 business days of this letter's issuance date. The financial remittance may be made in one of the following ways:

1. Mail us a check to the address shown below this document's signature area.
2. Wire the funds to us. Instructions are below this document's signature area.

Please call or email Julia Butler with any questions regarding the check or wire process. Her phone number is 678-553-8569, and her email address is julia.butler@amerisbank.com.

We appreciate the opportunity to provide financing for your business. If you have any further questions, please contact me at (586) 531-7330.

Sincerely,

Doug Dunkelberg

Doug Dunkelberg – Business Development Officer
Government Guaranteed Lending Division

Applicant's Acknowledgment:

Royal Palm Charter School, Inc.

By: *Shannon Sviben*
Shannon Sviben, Authorized Signer

Lori Grodecky
Board President - Lori Grodecky

Accepted and agreed to this 22 day of June, 2022.

Mailing instructions

Julia Butler
Ameris Bank - GGL Division
3490 Piedmont Rd NE, Suite 750

Atlanta, GA 30305

Wire Instructions

To: Ameris Bank
Address: 225 South Main Street - Moultrie, GA 31768
Phone: (678) 553-8569
Routing: 061201754
Customer Name: Royal Palm Charter School, Inc.
Credit Funds to: Acct. # 152011 (Ameris Bank's GGL Department / Julia Butler)

Additional Items Needed for Full Underwriting:

Business

1. Copy of the Fixed Price Construction Contract
2. Detailed cost estimates (if updated from the ones already provided dated for March 2022)
3. Business Plan with 3 years of financial statement projections to include P&L, Balance Sheet, and Statement of Cashflows
4. Written assumptions used in preparing the financial statement projections.
5. Key Management Resumes
6. Current list of Board of Directors/Officers with addresses and board terms (this helps establish community support)
7. Evidence of significant community support in the form of a written certification from any affected local government body within the service area of the facility. The certificate of support should include sufficient information to determine that a community facility will provide needed services to the community, will have no adverse impact on other community facilities providing similar services and must be signed by an authorized official of the local government.
8. Enrollment Statistics 2019, 2020, 2021
9. Financial feasibility analysis/report – We will try to update this. However, the USDA regs have changed since the last loan and USDA could require this to be done by an independent third party.
10. Interim Financial Statement to include a Balance Sheet and P&L for April 30, 2022 or later
11. Business Debt Schedule
12. FF&E Inventory List
13. Ameris Bank Application/Loan Request Form with a brief description of business and loan request
14. Copy of the Charter Agreement with State of Florida
15. Organizational documents – only if there have been changes since 2019
16. How will RPCS manage the existing students while the building is being built?
17. Does RPCS have any type of waiting list for students wanting to attend?
18. What type of rating does RPCS currently have? Did RPCS ever obtain the B rating discussed back in 2018?
19. Does RPCS expect any changes to the Florida Education Finance Program (FEFP) program funding and is that increased each year to address inflation, etc?

Additional Items may be required during the underwriting process that will be requested from the Lender or the USDA.

AIA® Document A101® – 2017

Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum

AGREEMENT made as of the Seventh day of June in the year Two Thousand Twenty-two
(In words, indicate day, month and year.)

BETWEEN the Owner:
(Name, legal status, address and other information)

Royal Palm Charter School, Inc.
7145 S. Babcock Street
Palm Bay, FL 32909
Telephone Number: 321.723.0650

and the Contractor:
(Name, legal status, address and other information)

Haddow Construction, Inc., Subchapter S Corporation
P.O. Box 560870
Rockledge, FL 32956
1085 Adamson Road
Cocoa, FL
Telephone Number: 321.631.7063
Fax Number: 321.638.8785

for the following Project:
(Name, location and detailed description)

Royal Palm Charter School Phase 1 of 2022 Expansion
7155 SE Babcock Street,
Grant-Valkaria, FL 32909
Preconstruction, grounds demolition and earthwork, preparation of property for Building Construction Phase II.

The Architect:
(Name, legal status, address and other information)

American Design Consultants, P.A.
451 Bluemist Way
Arden, NC 28704
Telephone Number: 321.302.6799

The Owner and Contractor agree as follows.

ADDITIONS AND DELETIONS:

The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed. A vertical line in the left margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

The parties should complete A101®-2017, Exhibit A, Insurance and Bonds, contemporaneously with this Agreement. AIA Document A201®-2017, General Conditions of the Contract for Construction, is adopted in this document by reference. Do not use with other general conditions unless this document is modified.

TABLE OF ARTICLES

- 1 THE CONTRACT DOCUMENTS
- 2 THE WORK OF THIS CONTRACT
- 3 DATE OF COMMENCEMENT AND SUBSTANTIAL COMPLETION
- 4 CONTRACT SUM
- 5 PAYMENTS
- 6 DISPUTE RESOLUTION
- 7 TERMINATION OR SUSPENSION
- 8 MISCELLANEOUS PROVISIONS
- 9 ENUMERATION OF CONTRACT DOCUMENTS

EXHIBIT A INSURANCE AND BONDS

ARTICLE 1 THE CONTRACT DOCUMENTS

The Contract Documents consist of this Agreement, Conditions of the Contract (General, Supplementary, and other Conditions), Drawings, Specifications, Addenda issued prior to execution of this Agreement, other documents listed in this Agreement, and Modifications issued after execution of this Agreement, all of which form the Contract, and are as fully a part of the Contract as if attached to this Agreement or repeated herein. The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations, or agreements, either written or oral. An enumeration of the Contract Documents, other than a Modification, appears in Article 9.

ARTICLE 2 THE WORK OF THIS CONTRACT

The Contractor shall fully execute the Work described in the Contract Documents, except as specifically indicated in the Contract Documents to be the responsibility of others.

ARTICLE 3 DATE OF COMMENCEMENT AND SUBSTANTIAL COMPLETION

§ 3.1 The date of commencement of the Work shall be:

(Check one of the following boxes.)

- ☐ The date of this Agreement.
- ☐ A date set forth in a notice to proceed issued by the Owner.
- ☒ Established as follows:
(Insert a date or a means to determine the date of commencement of the Work.)
Upon issuance of Building Permit.

If a date of commencement of the Work is not selected, then the date of commencement shall be the date of this Agreement.

§ 3.2 The Contract Time shall be measured from the date of commencement of the Work.

§ 3.3 Substantial Completion

§ 3.3.1 Subject to adjustments of the Contract Time as provided in the Contract Documents, the Contractor shall achieve Substantial Completion of the entire Work:

(Check one of the following boxes and complete the necessary information.)

Init.

[] Not later than () calendar days from the date of commencement of the Work.

[X] By the following date: July 15, 2022, assumes weather conditions cooperate and materials remain available.

(Paragraph deleted)

(Table deleted)

(Paragraph deleted)

ARTICLE 4 CONTRACT SUM

§ 4.1 The Owner shall pay the Contractor the Contract Sum in current funds for the Contractor's performance of the Contract. The Contract Sum shall be Two Hundred Thirty-Nine Thousand Eight hundred Seventy-Six Dollars and 30 Cents (\$ 239,876.30), subject to additions and deductions as provided in the Contract Documents.

(Table deleted)

(Paragraphs deleted)

(Table deleted)

(Paragraphs deleted)

§ 4.3 Allowances, if any, included in the Contract Sum:

(Identify each allowance.)

Item	Price
Any material price increase will be passed on to the Owner.	

(Paragraphs deleted)

(Table deleted)

(Paragraphs deleted)

ARTICLE 5 PAYMENTS

§ 5.1 Progress Payments

§ 5.1.1 Based upon Applications for Payment submitted to the Owner by the Contractor, the Owner shall make progress payments on account of the Contract Sum to the Contractor as provided below and elsewhere in the Contract Documents.

§ 5.1.2 The period covered by each Application for Payment shall be one calendar month ending on the 25th day of the month, or as follows:

§ 5.1.3 Provided that an Application for Payment is received by the Owner not later than the 25th day of a month, the Owner shall make payment of the amount certified to the Contractor not later than the 10th day of the following month. If an Application for Payment is received by the Owner after the application date fixed above, payment of the amount certified shall be made by the Owner not later than ten (10) days after the Owner receives the Application for Payment.

(Federal, state or local laws may require payment within a certain period of time.)

§ 5.1.4 Each Application for Payment shall be based on the most recent schedule of values submitted by the Contractor in accordance with the Contract Documents. The schedule of values shall allocate the entire Contract Sum among the various portions of the Work. The schedule of values shall be prepared in such form, and supported by such data to substantiate its accuracy, as the Owner may require. This schedule of values shall be used as a basis for reviewing the Contractor's Applications for Payment.

Init.

§ 5.1.5 Applications for Payment shall show the percentage of completion of each portion of the Work as of the end of the period covered by the Application for Payment.

§ 5.1.6 In accordance with AIA Document A201™–2017, General Conditions of the Contract for Construction, and subject to other provisions of the Contract Documents, the amount of each progress payment shall be computed as follows:

§ 5.1.6.1 The amount of each progress payment shall first include:

- .1 That portion of the Contract Sum properly allocable to completed Work;
- .2 That portion of the Contract Sum properly allocable to materials and equipment delivered and suitably stored at the site for subsequent incorporation in the completed construction, or, if approved in advance by the Owner, suitably stored off the site at a location agreed upon in writing; and
- .3 That portion of Construction Change Directives that the Architect determines, in the Architect's professional judgment, to be reasonably justified.

§ 5.1.6.2 The amount of each progress payment shall then be reduced by:

- .1 The aggregate of any amounts previously paid by the Owner;
- .2 The amount, if any, for Work that remains uncorrected and for which the Architect has previously withheld a Certificate for Payment as provided in Article 9 of AIA Document A201–2017;
- .3 Any amount for which the Contractor does not intend to pay a Subcontractor or material supplier, unless the Work has been performed by others the Contractor intends to pay;
- .4 For Work performed or defects discovered since the last payment application, any amount for which the Owner may withhold payment, or nullify a Certificate of Payment in whole or in part, as provided in Article 9 of AIA Document A201–2017; and

§ 5.1.7 Retainage

§ 5.1.7.1 For each progress payment made prior to Substantial Completion of the Work, the Owner may withhold the following amount, as retainage, from the payment otherwise due:

(Insert a percentage or amount to be withheld as retainage from each Application for Payment. The amount of retainage may be limited by governing law.)

There shall be no retainage on this Project.

§ 5.1.7.1.1 The following items are not subject to retainage:

(Insert any items not subject to the withholding of retainage, such as general conditions, insurance, etc.)

No retainage on this Project.

§ 5.1.7.2 Reduction or limitation of retainage, if any, shall be as follows:

(If the retainage established in Section 5.1.7.1 is to be modified prior to Substantial Completion of the entire Work, including modifications for Substantial Completion of portions of the Work as provided in Section 3.3.2, insert provisions for such modifications.)

§ 5.1.7.3 Except as set forth in this Section 5.1.7.3, upon Substantial Completion of the Work, the Contractor may submit an Application for Payment that includes the retainage withheld from prior Applications for Payment pursuant to this Section 5.1.7. The Application for Payment submitted at Substantial Completion shall not include retainage as follows:

(Insert any other conditions for release of retainage upon Substantial Completion.)

§ 5.1.8 If final completion of the Work is materially delayed through no fault of the Contractor, the Owner shall pay the Contractor any additional amounts in accordance with Article 9 of AIA Document A201–2017.

Init.

§ 5.1.9 Except with the Owner's prior approval, the Contractor shall not make advance payments to suppliers for materials or equipment which have not been delivered and stored at the site.

§ 5.2 Final Payment

§ 5.2.1 Final payment, constituting the entire unpaid balance of the Contract Sum, shall be made by the Owner to the Contractor when

- .1 the Contractor has fully performed the Contract except for the Contractor's responsibility to correct Work as provided in Article 12 of AIA Document A201-2017, and to satisfy other requirements, if any, which extend beyond final payment; and

(Paragraph deleted)

§ 5.2.2 The Owner's final payment to the Contractor shall be made no later than 30 days after the issuance of the final inspection of Phase I by Grant-Valkaria, or as follows:

§ 5.3 Interest

Payments due and unpaid under the Contract shall bear interest from the date payment is due at the rate stated below, or in the absence thereof, at the legal rate prevailing from time to time at the place where the Project is located.

(Insert rate of interest agreed upon, if any.)

%

ARTICLE 6 DISPUTE RESOLUTION

§ 6.1 Initial Decision Maker

The Architect will serve as the Initial Decision Maker pursuant to Article 15 of AIA Document A201-2017, unless the parties appoint below another individual, not a party to this Agreement, to serve as the Initial Decision Maker.

(If the parties mutually agree, insert the name, address and other contact information of the Initial Decision Maker, if other than the Architect.)

Plata Engineering, Inc.
P.O. Box 361003
Melbourne, FL 32936
321.259.7528

§ 6.2 Binding Dispute Resolution

For any Claim subject to, but not resolved by, mediation pursuant to Article 15 of AIA Document A201-2017, the method of binding dispute resolution shall be as follows:

(Check the appropriate box.)

- ☐ Arbitration pursuant to Section 15.4 of AIA Document A201-2017
- ☒ Litigation in a court of competent jurisdiction
- ☐ Other *(Specify)*

If the Owner and Contractor do not select a method of binding dispute resolution, or do not subsequently agree in writing to a binding dispute resolution method other than litigation, Claims will be resolved by litigation in a court of competent jurisdiction.

ARTICLE 7 TERMINATION OR SUSPENSION

§ 7.1 The Contract may be terminated by the Owner or the Contractor as provided in Article 14 of AIA Document A201-2017.

§ 7.1.1 If the Contract is terminated for the Owner's convenience in accordance with Article 14 of AIA Document A201-2017, then the Owner shall pay the Contractor a termination fee as follows:

Init.

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(1249324866)

(Insert the amount of, or method for determining, the fee, if any, payable to the Contractor following a termination for the Owner's convenience.)

Percentage of Contract completed.

§ 7.2 The Work may be suspended by the Owner as provided in Article 14 of AIA Document A201-2017.

ARTICLE 8 MISCELLANEOUS PROVISIONS

§ 8.1 Where reference is made in this Agreement to a provision of AIA Document A201-2017 or another Contract Document, the reference refers to that provision as amended or supplemented by other provisions of the Contract Documents.

§ 8.2 The Owner's representative:

(Name, address, email address, and other information)

Shannon Shupe Sviben
7145 S. Babcock Street
Palm Bay, FL 32909
Telephone Number: 321.723.0650
Email Address: Shannon.Shupe@royalpalmcharter.com

§ 8.3 The Contractor's representative:

(Name, address, email address, and other information)

Joseph W. Haddow
P.O. Box 560870
Rockledge, FL 32956
1085 Adamson Road
Cocoa, FL
Telephone Number: 321.631.7063
Fax Number: 321.638.8785
Mobile Number: 321.403.1568
Email Address: hci@cfl.rr.com

§ 8.4 Neither the Owner's nor the Contractor's representative shall be changed without ten days' prior notice to the other party.

§ 8.5 Insurance and Bonds

§ 8.5.1 The Owner and the Contractor shall purchase and maintain insurance as set forth in AIA Document A101™-2017, Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum, Exhibit A, Insurance and Bonds, and elsewhere in the Contract Documents.

(Paragraph deleted)

§ 8.6 Notice in electronic format, pursuant to Article 1 of AIA Document A201-2017, may be given in accordance with AIA Document E203™-2013, Building Information Modeling and Digital Data Exhibit, if completed, or as otherwise set forth below:

(If other than in accordance with AIA Document E203-2013, insert requirements for delivering notice in electronic format such as name, title, and email address of the recipient and whether and how the system will be required to generate a read receipt for the transmission.)

§ 8.7 Other provisions:

Init.

ARTICLE 9 ENUMERATION OF CONTRACT DOCUMENTS

§ 9.1 This Agreement is comprised of the following documents:

.1 AIA Document A101™-2017, Standard Form of Agreement Between Owner and Contractor
(Paragraphs deleted)

.5 Drawings

Number	Title	Date
By Plata Engineering	Drawings	6/2/2022

.6 Specifications

Section	Title	Date	Pages
By Plata Engineering	Specifications	6/2/2022	

.7 Addenda, if any:

Number	Date	Pages
N/A		

Portions of Addenda relating to bidding or proposal requirements are not part of the Contract Documents unless the bidding or proposal requirements are also enumerated in this Article 9.

(Table deleted)


(Paragraphs deleted)

(Paragraphs deleted).9 Other documents, if any, listed below:

(List here any additional documents that are intended to form part of the Contract Documents. AIA Document A201™-2017 provides that the advertisement or invitation to bid, Instructions to Bidders, sample forms, the Contractor's bid or proposal, portions of Addenda relating to bidding or proposal requirements, and other information furnished by the Owner in anticipation of receiving bids or proposals, are not part of the Contract Documents unless enumerated in this Agreement. Any such documents should be listed here only if intended to be part of the Contract Documents.)

Exhibit 'A'

This Agreement entered into as of the day and year first written above.


OWNER (Signature) Lori Grodecky, Pres.
Shannon Shupe Sviben,
Principal/Executive Director
(Printed name and title)

CONTRACTOR (Signature)
Joseph W. Haddow,
President
(Printed name and title)

Init.

Haddow Construction, Inc.

P.O. Box 560870 ~ Rockledge, FL 32956 (321) 631-7063

License #CBC1259694

May 23, 2022

Shannon Shupe
Royal Palm Charter School, Inc.
7135 S. Babcock Street
Grant-Valkaria, FL

REVISED PROPOSAL

Phase I of 2022 Expansion

Phase I will include the following items to appease previously made agreements with Brevard County. Building Construction pricing will follow in Phase II.

I. Preconstruction:

- Most preconstruction items have been paid for, however, the following items may need to be paid by Owner:
 - Additional engineering
 - Impact fees
 - Permit fees

II. Sitework: (increased fuel cost)

- Mobilization \$ 4,500.00
- Erosion control (silt fence) and rock construction entrance 6,425.00
- MOT 450.00

III. Demolition: 24,200.00

- Remove all trees impacting construction
- Remove abandoned drain field
- Remove existing concrete drive as per plan
- Strip and haul away vegetation
- Remove existing dumpster enclosure

IV. Earthwork: (increased fuel cost) 24,000.00

- Build future building pad using on-site fill from retention pond
- Dig Phase I of retention pond
- Grade for concrete drive
- Final grade all disturbed areas as per plan

NOTE: Any imported fill will be charged by the truck load.

V.	Storm Drainage: (price increase of material)	\$ 35,500.00
	<ul style="list-style-type: none">◦ (2) mitered ends◦ (2) Type F boxes◦ 60 LF of 6" PVC◦ 110 LF 14 x 23 RCP◦ (1) control structure (to be installed in Phase 2)	
VI.	Water: (price increase of material)	3,500.00
	<ul style="list-style-type: none">◦ 180 LF 2" water line PVC	
VII.	Fire Water Line: (price increase of material)	22,800.00
	<ul style="list-style-type: none">◦ 340 LF 4" fire main◦ (1) 4" tie-in	
VIII.	Concrete Paving:	
	<ul style="list-style-type: none">◦ 6" paving of parking and drives, 3,000 psi with fiber mix as per plan◦ 460 LF of 'D' concrete curb◦ Concrete paving for dumpster enclosure (included)	55,080.00 9,200.00
IX.	Landscape & Irrigation	21,615.00
	<ul style="list-style-type: none">◦ Irrigation includes pump, temporary battery timer connected to existing well. Note: Assumes existing well is suitable for use.◦ 100% coverage as needed for Phase I◦ Landscaping per plan for Phase I	
X.	Signage & Striping:	4,500.00
	<ul style="list-style-type: none">◦ Stop signs and handicap signs◦ Striping and arrows	
XI.	Dumpster Enclosure:	4,500.00
	<ul style="list-style-type: none">◦ CMU's (block)◦ Stucco◦ Gates◦ Bollards	
XII.	Fencing:	3,800.00
	<ul style="list-style-type: none">◦ Temporary fencing between Phase I and Phase II	
XIII.	Contractor Fee @ 9%:	19,806.30
	Phase I Total:	\$239,876.30

Phase I Total:

\$239,876.30

Any alteration or deviation from the Specifications within this Proposal involving extra costs will be performed only upon an executed Change Order to the Contract amount. This Proposal is subject to acceptance within thirty (30) days and is void thereafter at the option of the undersigned.

Contract will follow acceptance of this Proposal.

Submitted by,



Joseph W. Haddow
President

ACCEPTANCE OF PROPOSAL:

You are hereby authorized to perform the above work based upon the prices, specifications and conditions as stated.

AUTHORIZED SIGNATURE OF ACCEPTANCE:



DATE:

5/23/2022

Erik J Brown
Royal Palm Charter School Board VP



7145 Babcock Street, S.E.
Palm Bay, Florida 32909
Phone (321) 723-0650
Fax (321) 722-1117
www.royalpalmcharter.com

Board of Directors Meeting Calendar 2022-2023

All meetings held at Royal Palm Charter School at 5:30 PM unless indicated otherwise

Wednesday, July 20, 2022

Wednesday, October 26, 2022

Wednesday, February 8, 2023

Wednesday, April 12, 2023

Wednesday, June 21, 2023



7145 Babcock Street, S.E.
Palm Bay, Florida 32909
Phone (321) 723-0650
Fax (321) 722-1117
www.royalpalmcharter.com

4/13/22 @ 5:30 PM

Board of Directors Meeting Agenda

Directors:

Lori Grodecky, President
Erik Brown, Vice President
Alisha D'Alessandro Rozynski, Secretary
Kyley Haynes, Treasurer
Rachel Costa, Member

- I. Call to Order** *Brown called meeting to order, Rozynski 2nd*
- II. Roll Call** *Brown, Rozynski, Haynes, Costa, and Becka in attendance via Zoom, Shupe on campus*
- III. Reports and Presentations:** *Rozynski motioned to adopt the agenda, Brown 2nd*
 1. Budget Update – *Becka reviewed budget docs attached as well as Engagement letter – Noted budget vs actual on target, still some outstanding Title 1 and ESSER fund reimbursements that are coming in. She reminded board that this (McDonough) is the auditing firm that the school used last year, there were no concerns and would recommend staying with this firm. Brown inquired about putting some of the school's funds in another account to ensure that all is covered by FDIC. Discussed money market through Chase bank as a possibility or something through Ameris or even investments. Mrs. Shupe said that she would contact the school's representatives with Chase bank and Edward Jones to inquire about possibilities to share at the next board meeting.*
 - i. BVA
 - ii. Balance Sheet
 - iii. Engagement Letter - Audit
 2. Admin Update – *Shupe Mrs. Shupe discussed the enrollment numbers for the new school year vs current enrollment – noted that the only grade level of concern is 6th grade, but that is because the current enrollment is so low. Lost students in that class during Covid and did not pick up the additional students in 4th grade to close the gap. Mrs. Shupe discussed openings for next school year and that she has already started hiring. Openings include K (already hired), 3rd, 4th, MS ELA (already hired) and elementary PE. Mrs. Cotti is moving to Jacksonville, Mrs. Bolling has taken a position with her husband at Halo, Mrs. White is officially retiring and Mrs. Vernon is coming out of the classroom, but she will be moving to Mrs. White's position as a reading resource teacher. Discussed that Brooke Steelman has been in the 6th grade room because unable to find a teacher, but she is doing a fantastic job as a long-term sub.*
 - i. Enrollment – see attachment
 - ii. Staff Update
 1. Openings for 22-23
 3. Discuss New Building *Mrs. Shupe gave an update about the building and shared the proposal for the building – it will be done in two phases – Phase 1 – parking lot and Phase 2 – building. The goal is to start the parking lot piece immediately after the last day of school in order to be completed before school starts. The estimated time frame for Phase 2 is 6 months – that building will be 8 classrooms and two offices – main office will stay where it is.*
 - i. Phase 1 & Phase 2 Timeline/Cost
 - ii. Funding progress
 4. Discuss Base Salary Increase *Mrs. Shupe told the board that the BPS base salary appears to be set at \$46,800 and members of the board agreed that RP should match this base in order to help with*

recruitment and retention of highly qualified teachers. Becka mentioned RP typically does a 2% increase for other staff, the board agreed to continue that for 22-23 school year as well. Brown motioned to add the BPS base salary and 2% increase to the consent agenda

5. Discuss Covid Premium Pay Mrs. Shupe mentioned that although the board approved the premium pay, the teachers had not received yet b/c the funds have not been released to the district yet.
6. Discuss BPS Speech \$275 Supplement Mrs. Shupe told the board that BPS gave their speech pathologists a \$275 supplement and wanted to recommend that be extended to Janelle – the board members were in agreement
7. Discuss Cell Phone Policy Mrs. Shupe reviewed the attached cell phone policy, members agreed that the policy was a good idea and they're interested in seeing what the response is from parents and students
8. Discuss 22-23 Calendar Mrs. Shupe reviewed the attached calendar, it follows the pattern of the previous years without much variation
9. Present Evaluation of Title 1 Program Mrs. Shupe reviewed the attached power point on the Title 1 program and asked if there were any questions – the board did not have any questions
10. Board Members Rozynski introduced Rachel Costa officially to the board. Haynes recommended that a parent, Johnathan Roy be considered for the board based on his construction knowledge and community involvement, the board agreed it could be a good option and recommended that she discuss with him and see his interests and would report back in June
 - i. Welcome Rachel Costa
 - ii. Other Suggestions?

IV. Consent Agenda: *Brown motioned to approve consent agenda with the addition of the BPS base salary and 2% increase and Approval of McDonough Engagement Letter Haynes 2nd*

1. Approve New Building Phase 1 & 2 Plan
2. Approve Speech Pathologist Supplement
3. Approve Cell Phone Policy
4. Approve 22-23 Calendar
5. Approve Board Meeting Minutes 2/9/22

V. Non-Consent Agenda:

1. Next Meeting: Wednesday, June 22, 2022 at 5:30PM *It was discussed that the board could meet earlier this day since no school, members agreed the meeting will be at 3:00PM on this date at the school*

VI. Public Comment:

VII. Motion to Adjourn:


Board Approval

6-22-22
Date

ROYAL PALM CHARTER

BOARD MEETING

NOTICE

WEDNESDAY, 6/22/22

3:30PM

PUBLIC INVITED

I. Reports and Presentations:

1. Financial Update
 - i. BVA
 - ii. Balance Sheet
2. Admin Update – Sviben
 - i. BPS Site Visit – review
 - ii. Enrollment – see attachment
 - iii. Strategic Plan
 1. Staff Changes
 2. Curriculum
 3. Purchases, etc
 4. 22-23 Preliminary Budget
3. Discuss New Building Progress
 - i. Phase 1 & Phase 2 Timeline
 - ii. Phase 1 Cost Increase
 - iii. Funding progress - LOI
4. Board Members
 - i. Other Suggestions?
5. Discuss Options for Interest/Investing
 - i. Chase Bank
 - ii. Edward Jones

Join Zoom Meeting

<https://us04web.zoom.us/j/73564351228?pwd=Yej4YB-20ajRfEoh-R2uwnAJYG5Fqg.1>

Meeting ID: 735 6435 1228

Passcode: ROYALPALM