

# **FAU Charter Lab School in St. Lucie County**

An Innovative Partnership of  
St. Lucie School County District,  
Core Communities and  
Florida Atlantic University

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## **Vision and Mission**

- Vision: A regional, extended learning community focused on grades K-20 designed for ongoing innovation in teaching, research and service for the advancement of reforms to increase student performance across Florida.
- University charter lab school mission defined in Sections 1002.32 and 1002.33 F.S.

## Benefits

- Professional development site for FAU, IRCC, St. Lucie County School Board (SLCSB) and other regional partners.
- Additional space and program options for instruction, grades K-20.
- Educational research development and demonstration
- Regional resource for economic development, recreation, etc.

## Background

- Discussion initiated between FAU, Core Communities (CORE) and SLCSB in 2001 regarding a possible university charter lab school in Tradition Community, near the FAU Treasure Coast Campus.
- The BOT initially authorized negotiations between university staff and the partners on October 16, 2002.
- Administrative and statutory changes increased the project's complexity.

## Background – Cont.

- Statutory amendments changed the projected capital funding model. The BOT again approved the project on May 21, 2003 to conform.
- Programmatic progress was made and multiple financial models were proposed in 2003-04, which did not fit a quality grades k-12 school under the amended statutes.

## Background –Cont.

- In 2004-05, the possibility of a grades K-8 Phase I with the Phase II adding a possible high school was raised. The Florida Legislature appropriated \$15 million to FAU for the construction and \$500,000 for planning and start up.
- Meetings between the CEO's are convened regularly to review progress.

## General Transaction Plan

- The land (33 acres) has been deeded by CORE, the developer of the Tradition site, to the SLCSB in exchange for impact fee credits.
- FAU-BOT will concur with the formation of the university charter lab school (FAU-CLS) Not-for-Profit (NFP) corporation.
- FAU-BOT as sponsor, will consider the charter for the FAU-CLS from the NFP, as per statute for approval.

## Transaction Plan – Cont.

- With the NPF established, the BOT considers approval of a charter with the NPF to operate the school.
- As financing is finalized, the FAU-BOT would enter into an agreement with the SLCSB to authorize it to serve as the development, construction, and leasing agent for the university charter lab school facility, leasing to the NFP.

## Transaction Plan – Cont.

- FAU would transmit the \$15 million specifically appropriated for this purpose to SLCSB as provided in a future agreement.
- SLCSB would secure additional funding (some \$18-20 million) through bond proceeds or other SLCSB mechanisms.
- SLCSB would follow state purchasing and facility requirements to design, bid and construct a grades K-8 school (Phase I), leasing it to the NFP.

## Transaction Plan –Cont.

- Based on current statute, the university charter lab school will annually receive capital funding through a state categorical appropriation to FAU on behalf of the NFP, which would in turn transmit the committed portion of the funds to SLCSB as an annual lease payment for the school facility.
- The SLCSB would use the funds to service the facility bond debt.

## Transaction Plan – Cont.

- As the capital amount grows, an increasing annual portion of the capital funds would also be retained on behalf of the NFP by one of the partners to provide for future facility maintenance, repairs and equipment costs.
- Only state capital funds appropriated specifically for the school will be used for the lease. No FAU funds will be used for any operating or other costs.

## Transaction Plan –Cont.

- Operational costs would be entirely paid by state-provided FEFP funds allocated through FAU and administered through the FAU/Henderson School District (#72) as per the FAU-NFP charter. The NFP could contract with the SLCSB or others via a service and/or equipment agreements to meet the terms and conditions of the charter.

## Status

- The charter application was provided for information and to comply with statute. No BOT action was required.
- The Interim Funding and Reimbursement Agreement with SLCSB was approved by the BOT.
- The By-Laws and Articles of Incorporation for the required NFP are provided for information and concurrence of the BOT.
- The charter is provided for BOT action.

## Charter Highlights

- Begins school year 2008-09 covers 15 year term, with non-renewal, emergency termination and renewal provisions as required in statute.
- Includes requirements for annual reporting of stated goals, financial status and other related information.

## Charter Highlights-Cont.

- Representative population of St. Lucie County students served, initially grades K-8.
- If the charter school is terminated, all assets purchased through state-appropriated funds to FAU, reverts to FAU.
- Fees collected as per statute.

## Charter Highlights-cont.

- Services may be contracted with public or private entities, including audits, instruction, food services, cleaning, security, insurance, etc.
- Goals include student FCAT progress, innovative curriculum, teacher preparation, research and leadership.



## **BOT Future Action Required**

Fall 2006

- Joint construction agreements
- Other action may be necessary as the process matures.