

# **Organization Information**

Organization Name \*

Heritage Collegiate Leadership Academy

Telephone Fax

9193765887 9842047746

Address Unit/Suite

7275 Circlebank Drive

Zip Code City
27615 Raleigh

State

North Carolina

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6/8/2022



# **NC Public Charters**



Primary Contact Name *	Opening Year *		
Kashi Bazemore	2024		
Is Management Organization Used  Yes No	Management Organization Name		
Primary Contact Relation To Board * Board Chair	Primary Contact Email * hclaboardchair@gmail.com		
Management Organization Contact Name	Management Organization Phone		
Primary Contact Phone * 9193765887	Management Organization Email		
PrimaryContact Address * 5601 Paul Road	Unit/Suite *		
Zip Code *	City *		
27616	Raleigh		
State *			
North Carolina			

#### **NC Public Charters**



# 1. Application Contact Information

# Q1.Name of Proposed Charter School

Heritage Collegiate Leadership Academy of Wake County DBA HCLA-WAKE

# **Applicant Comments:**

No additional comments

# Q2.Primary Contact's Alternate Telephone Number (xxx-xxx-xxxx)

• The primary contact will serve as the contact for follow-up, interviews, and notices regarding this Application

'Dr. Kashi Bazemore, HCLA-Wake Board Chair

5601 Paul Road

Raleigh, North Carolina 27616

919 376-5887

### **Applicant Comments:**

No Additional Comments

# Q3.Geographic County in which charter school will reside

Northeastern Wake County North Carolina

### **Applicant Comments:**

No additional comments.

### **Q4.LEA/District Name**

Wake County Public Schools System

# **Applicant Comments:**

No additional comments.

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# Q5.Zip code for the proposed school site, if known

27616 or in the surrounding area in Northeastern Wake County

Q6.Was this application prepared with the assistance of a third party such as a consultant or <u>Charter Support Organization (CSO) (https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=hejlslsh9el7BC8rRkMVLthGg%3d%3d&ptid=amlgTZiB9plushNjl6WXhfiOQ%3d%3d&secid=lyc2NlZPsdzgEk6V6aJ45g%3d%3d&PG=6&lRP=0)?</u>

e

No

# **Q10.Projected School Opening Month**

August 2024

Q11.Will this school operate on a year-round schedule?

- Yes (Year-Round)
- No

Q12.Complete the Enrollment Summary table (see resources), providing grade levels and total projected student enrollment for Years 1-5.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 1



### **NC Public Charters**

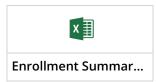


# **Applicant Comments:**

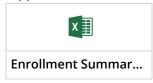
The HCLA-WAke Projected Enrollment Summary table for years 1-5 has been uploaded. The numbers are as follows:

Year	<b>Grade Levels</b>	Projected Student Enrollment
Year 1 (24-25)	K-6	440
Year 2 (25-26)	K-7	520
Year 3 (26-27)	K-8	600
Year 4 (27-28)	K-8	600
Year 5 (28-29)	K-8	600

#### Resources



# **Applicant Evidence:**



Uploaded on **3/27/2022** 

by Mildred Bazemore

Q13.Complete the Enrollment Demographics table (see resources), providing projected enrollment for each of the following demographic groups.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 1

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### **Applicant Comments:**

The Enrollment Demographics table has been uploaded. The HCLA-Wake planning team anticipates that the enrollment of the school will reflect the demographic percentages of the non-magnet schools located in the targeted Northeastern and Eastern Wake County such as Fox Road Elementary, Wilburn Elementary. Wildwood Forest Elementary, Riverbend Elementary, Riverbend Middle School, East Wake Middle School, East Middlebrook Middle, and Rolesville Middle. The HCLA-Wake Board of Directors anticipates the school's demographics to reflect the following:

Black/African American 45%

Hispanic 30%

White 10%

Asian 5%

Mixed Race 5%

Other 5%

The HCLA-Wake planning team also expects at least 40 percent of the students will be economically disadvantaged, at least 14 percent of the students will be classified as students with disabilities, and approximately10.5 percent will be English Language Learners. These percentages are based on the percentages from Wake County Public Schools district. The Board and the planning team anticipate that HCLA-Wake will be a school-wide Title I school.

While these projections closely reflect the enrollment of students at a 6-8 Wake County public middle school located in zip code 27616 (River Bend), the school's admission's policy will be followed and the enrollment process will not discriminate against any student who is eligible and desires to attend the school as long as seating is available. The 27616 and surrounding area community is diverse so the actual enrollment may or may not follow these projections. HCLA-Wake's enrollment philosphy is "those who will, let them come" as long as enrollment slots are available and the students and parents are interested in participating in the HCLA experience.

#### Resources





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# **Applicant Evidence:**



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Q14.Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan outlined above.



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The HCLA Board of Directors believe that the HCLA-Wake will draw the majority of its students from the Northeastern, North Central, and Eastern Wake County communities as many of the nonmagnet schools in that area appear not to be adequately meeting the needs of their students based on data from the North Carolina Public Schools Report Card from 2018-19. HCLA-Wake will accept any application of eligible students who lived within the vicinity of the school or from areas where transportation will be provided or where parents are willing to provide daily transportation. Upon reevaluating the school's mission, it is the belief of the board and the planning team that to begin the school at grades K-6 the first year allows for the early cultivation of students' basic skills and strategies exposure necessary to acquire and nurture a culture of high expectations, a high level of student motivation, and an intrinsic desire for learning and providing services to others less fortunate. Beginning with the primary grades is critical in cultivating the growth and development of students as they begin school and especially when the school grows with them as they progress through primary, elementary, and middle school. A goal is to ensure that every student gets to realize and maximize his/her potential in preparation to be successful at the next level of schooling and beyond. Beginning with grades K-6 allows for a smaller number of students to initiate the program before the school grows during the second year and maximizes to 600 students after the second year. The educational program set forth by this application will support and improve student learning by providing extensive services at every grade level beginning at grade K and progressing over time to include grades K-8. Those support services will include learning to incorporate technology, social, career, and academic counseling including dealing with trauma, instructional coaching, opportunities for Socratic discourse and seminars as well as using projects to facilitate learning and field trips to authenticate why learning is important and to provide services to the community.

Several members of the planning team and Board have had prior training and experience in planning and setting up an effective charter school for economically challenged and academically-challenged students. This includes the marketing, recruitment, planning, and setting up an effective operational educational program including acquiring academic resources and scheduling classes and activities at the school. It also includes hiring and negotiating benefits, setting up effective annual operational budget resolutions as well as setting up effective special programs such as a student transportation system, a school-based child nutrition program, and a school-wide Title I program.

The planning team including the planning board for HCLA\_Wake encourages the OCS to contact the staff in NCDPI Child Nutrition, the staff in the Transportation Department, and the Title I programs for references on the quality of the respective programs previously offered by HCLA.

### **NC Public Charters**



Q15. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- I certify
- I do not certify

# **Applicant Comments:**

The only application from which information in this application was taken is the previous application for Heritage Collegiate Leadership Academy-Wake County from 2021.

# **Q16.Explanation (optional)**

Components of this application were generated initially for HCLA-Wake during the application cycle in 2021.

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# 2. Non-Profit Corporation Information

Private Non-profit Corporation (NCGS 115C-218.1)

• The nonprofit corporation must be officially authorized by the NC Secretary of State upon application submission.

# **Q17.Organization Type**

- Non-Profit Corporation
- Municipality

# **Applicant Comments:**

No additional comments.

### **Applicant Evidence:**



INC-ArticlesofIncorp...

Uploaded on **3/27/2022** 

by Mildred Bazemore

Q18.Has the organization applied for 501(c)(3) non-profit status?

- Yes
- O No

# **Applicant Comments:**

No additional comments.

Q19. The private non-profit listed as the responsible organization for the proposed charter school has 501(c)(3) status:

#### **NC Public Charters**



- Federal Tax-Exempt Status (NCGS 115C-218.15)
- If the non-profit organization has yet to obtain 501(c)(3) status, the tax-exempt status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date the Charter Application is given final approval.
  - Yes
  - O No

# **Q20.**Attach Appendix F Federal Documentation of Tax-Exempt Status

☑ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

**Total Files Count: 10** 

# **Applicant Comments:**

A copy of the Federal Documentation of Tax Exempt Status document is attached.

# **Applicant Evidence:**



IRS Non-Profit Appro...

Uploaded on **3/27/2022** 

by Mildred Bazemore

# **Q21.Name of Registered Agent and Address:**

Mildred G. Bazemore

Heritage Collegiate Leadership Academy

5601 Paul Road

Raleigh, NC 27616

# Q22.Federal Tax ID

46-1809428



# **NC Public Charters**



# Applicant Comments :

No additional comments.



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# 3. Acceleration

Per State Board of Education policy CHTR-013 (https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=CHTR-013&Sch=10399&S=10399&C=CHTR&RevNo=1.12&T=A&Z=P&St=ADOPTED&PG=6&SN=true), the State Board of Education, in its discretion, may accelerate the mandatory planning year to increase the number of high-quality charter schools.

Q23.Do you want your application to be considered for acceleration?

- O Yes
- No



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# 4. Conversion

Q38.Is this application a Conversion from a traditional public school or private school?

- O Yes
- No



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# 5. Replication

Per SBE policy CHTR-016 (https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=CHTR-016& Sch=10399&S=10399&C=CHTR&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true), the State Board of Education (SBE) may, in certain well-defined instances, grant permission for a non-profit corporation board of directors (board) to replicate either its own successful model or to employ an educational management company (EMO) or a charter management organization (CMO) to replicate a successful model currently being operated under the management of the EMO or CMO. The SBE may also, in certain well-defined instances, grant permission for a non-profit corporation board to "fast track" such a replication by foregoing the planning year normally required for newly-approved charter applicants.

Q55.ls this application being submitted as a replication of a current charter school model?

- O Yes
- No

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#### 6. Alternative

\*A charter school meeting the eligibility criteria set forth in this policy and seeking designation as an "alternative school" must submit an application to the Office of Charter Schools describing in detail the school's mission as it relates to the request for the designation; the criteria the school plans to use that will meet the eligibility requirements set forth below, including the documentation the school will use to support its admissions process; how the school intends to serve the select population, educationally and otherwise; and the goals the school is setting for academic achievement for this population. The application must also include an admission plan that is well-defined and specifically limited to serving at-risk students as described in the application. A plan that is not well-defined will not be approved.

\*The school must, in its application, designate which of the alternative accountability options it is requesting under ACCT-038 (https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=ACCT-038&Sch=10399&S=10399&C=ACCT&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true). The option selected, if approved, cannot be changed except at the time of renewal (as outlined in CHTR-020.III (https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=CHTR-020&Sch=10399&S=10399&C=CHTR&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true)).

Q84.Do you want your application to be considered for an Alternative Charter School?

Yes

No



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# 7. EMO/CMO

Q86.Does the Charter School plan to contract for services with an "educational management organization" or "charter management organization?

- O Yes
- No



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# 8. Mission Purposes, and Goals

#### 8.1. Mission and Vision

The mission and vision statements, taken together, should:

- Identify the students and community to be served;
- Illustrate what success will look like; and
- Align with the purposes of the NC Charter School Law.

Q101.Please state the mission statement of the proposed charter school (35 words or less)

- The mission statement defines the organization's purpose and primary objectives, describing why it exists.
- The mission statement should indicate in measurable terms what the school intends to do, for whom, and to what degree.

Heritage Collegiate Leadership Academy will prepare its scholars to become career and collegebound service-oriented leaders who are motivated to make a difference in their communities and in the world.

Q102.Please state the vision statement of the proposed school.

- What will the school look like when it is achieving the mission?
- The vision statement outlines how the school will operate and what it will achieve in the long term.

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Heritage Collegiate Leadership Academy will contribute to the educational communities at the local, state, and national levels by identifying and implementing innovative learning techniques and strategies as well as best educational practices that can be replicated by other schools to positively impact student learning and student attitudes towards learning on a broader level. There will be an emphasis on the integration of an continuum of digital strategies to enhance access to a broader array of techniques and opportunities. The unique learning style of students will be emphasized as scholars embark upon the guest for excellence as they strive for academic, behavioral, and social engagement and progression in order to realize their potential. An emphasis is placed especially on techniques and strategies that work effectively with students with high-poverty, low-performance backgrounds, students with unique learning styles such as some students with disabilities who live with autism and ADHD, and are accustomed to accessing minimal or limited home and community resources. HCLA-Wake will encourage its scholars to seek equitable access to learning opportunities by using a variety of techniques and strategies to demonstrate their quest for academic excellence in realizing their potential in their lifelong pursuits with an emphasis on building and enhancing their reading, speaking, writing, research, data usage and analysis, organization, and advocacy skills. HCLA-WAKE anticipates serving high-poverty, previously low-performing students from diverse cultures in the Northeastern and the North Central regions of Wake County that are currently being served by non-magnet Wake County Public Schools that are low-performing schools in those communities.

At HCLA-Wake, the school's vision includes guidance from the quotes of four leaders who helped to change the world:

- "Education is the most powerful weapon that you can use to change the world." Nelson Mandela
- "The function of education is to teach one to think intensively and to think critically. Intelligence plus character-that is the goal of true education." Martin Luther King, Jr.
- "Be the change you wish to see in the world." Mahatma Gandhi
- "We are one, our cause is one, and we must work together if we are to succeed." Frederick Douglas

In addition, a quote from another leading researcher and trainer influences our belief regarding leadership:

• "If you want to change the world, focus on leaders, if you want to change leaders, focus on them when they are young." - Alan E. Nelson (Kidlead-Growing Great Leaders)

Q103.Educational Need and Targeted Student Population of the Proposed Charter



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**School** Provide a description of the Targeted Population in terms of demographics. In your description, include how this population will reflect the racial and ethnic composition of the school system in which it is located. Additionally, how it will reflect the socioeconomic status of the LEA, SWD population, and ELL population of the district? See G.S. 115C-218.45(e) (https://www.ncleg.net/EnactedLegislation/Statutes /PDF/BySection/Chapter\_115C/GS\_115C-218.45.pdf).



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The targeted demographic student population does not necessary reflect the overall racial and ethnic composition of the overall student population of Wake County Public Schools, but does reflect the general racial and ethnic population of communities and the non-magnet K-8 schools in the Northeastern and Eastern communities of Wake County. Many of the non-magnet K-8 schools in Northeastern Wake County are high poverty and low-performing schools as is evidenced by their performance on the 2018-19 NC Public Schools Report Cards. For instance, River Bend Middle School in Northeastern Wake County has a \$43 million beautiful building, (Grades 6-8 non-magnet), has 1,195 students and is located in ZIP Code 27616 with demographics as follows: poverty level 69 percent, Black 43.2 percent, Hispanic 39.7percent, White 8.6 percent, and other 8.5 percent. According to the 2018-19 North Carolina Public Schools Report Card, River Bend Middle School received a letter Grade of D. In addition, according to test data from 2018-19, the school has 30 percent of its students proficient in Reading, and 22 percent proficient in Mathematics.

The other anticipated student demographics for HCLA-Wake are 40 percent or higher for high-poverty students, 45 Percent Black/African American, 30 Percent Hispanic, 10 percent White, 5 percent Asian, 5 percent Mixed Race, 5 percent other. In addition, the Students with disability population is anticipated to be approximately 14 percent and possibly higher since the school is expected to draw a high number of students with ADHD and high-function Autism, while the English Language Learners population is anticipated to be around 10.5 percent. Most of these statistics are comparable to the overall student demographic statistics for Wake County public Schools overall.

It is because of the high-poverty and low-performance of students in the non-magnet schools in Northeastern and North Central Wake County that HCLA-Wake planners feel the need to target this community to provide academic options for its students, parents, and families. In addition, many of the HCLA-Wake's supporters, participants on the planning team, including Board Members, live in these extended communities of Northeastern and North Central Wake County. The Board and planners believe that the option of an academically challenging charter school with high expectations for all students and with a focus on academic rigor, leadership, and service to the community that targets high-poverty students, students with challenges such as Autism and ADHD, will be a welcomed addition to this community.

This school has been designed as a school to motivate economically and educationally disadvantaged students teaching them to value and appreciate themselves, their culture, and the world around them. The school will value diversity and the varied cultures in Northeastern and Eastern Wake County but will have high expectations related to academics and student behaviors for all students.



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Q104.What are the enrollment trends and academic performance outcomes of surrounding schools in the selected community? What elements of your educational model will meet the needs of your target student population?



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The enrollment trends of the non-magnet schools in the targeted communities in especially upper Northeastern Wake County appear to reflect a similar pattern to the expected enrollment of HCLA-Wake. A large percentage of the students come from low-economic backgrounds that make them eligible for the State and federally-funded child nutrition program. Many of the students speak English as a second language at home and are diverse racially and culturally. The average academic performance of students in many of the comparable non-magnet schools (Grades K-8) is below the state averages in reading and in mathematics as reflected in the 2018-19 NC State School Report Cards. The HCLA-Wake Board and planning team believe that many aspects of HCLA-Wake's educational program will uniquely meet the needs and enhance the skills of the targeted population which will assist the students in improving their academic performance, their social skills, and their attitudes towards learning.

A major difference will be that each student will be taught to use and have access to a digital tablet/computer that will allow each student to go beyond the classroom to employ strategies and to access resources in order to learn specific skills and concepts and to independently practice and demonstrate what they have learned by completing meaningfully and aligned activities which overtime will ensure skill and concept mastery and internalization. Additionally, HCLA-Wake will become an AVID (Advancement via Individual Determination) school-wide certified school in which the staff will receive the necessary training to become invested in research based and successful instructional mode. The teachers will be trained by the AVID program leaders and will learn to embrace its research and philosophy regarding key concepts for students' success at school. Before an expectation for staff to implement the AVID Executive Functions, the staff will be fully trained by its program leaders on the use of its techniques, concepts, strategies, and its support materials. The school-wide AVID program will require students to embrace the key concepts of the program and beginning at grade 5-8 students will participate in electives that focus in more detail on the strategies and techniques of the Executive Functions for student success. The Executive Functions that promote student success include initially training teachers on what it encompasses and how to set up basic systems, organization, and structure in the classroom such as lesson plans, accessing resources to support instruction, curriculum scope and sequencing as well as setting up classroom structures and the learning environment. The expectation is that teacher will learn to use systems effectively and then teach students how to do the same along with teaching them the value of employing such techniques in their daily activities at school and away from school. Teachers and students will be taught the importance of (1) materials management including setting up an organization system, (2) time management and planning including how to break down a project and prioritization, (3) goal setting including setting short-term and long-term goals and goal mapping,



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(4) decision-making including making tough and quick decisions and problem-solving, (5) study strategies such as following directions, editing your work, memory techniques, brainstorming, organizing information and notetaking as well as test preparation and test-taking skills, and (6) exploring the different learning styles and strengths, and internalizing the concept of multiple intelligences.

In addition, HCLA-Wake will be identified as a global school welcoming scholars with diverse cultural backgrounds and where the cultural pride of diverse scholars is encouraged. Also, at the beginning of the each school year, each teacher will be trained on and loaned a copy of the teaching techniques and strategies espoused by Doug Lemov from Uncommon Schools in "**Teach Like a Champion 3.0**" and the "**Teach Like a Champion Field Guide 3.0**." Also, teachers and students will be trained on accessing and using digital instructional models using programs such as **Zearn** for K-8 Mathematics, **Khan Academy** for instructional techniques, strategies, support, and independent practice in a variety of content areas and objectives, and **IXL** for instructional techniques, strategies, and support, and independent practice on a wide variety of content related to specifically-focused standards and objectives. Every scholar will have exposure to small group life-coaching and success-coaching. These strategies will be used to supplement traditional classroom instruction throughout the school year.

Each year, at the beginning of the academic year, each scholar at HCLA-Wake will be given a customized school planner with space for a daily and weekly organization entries and it lists daily the content areas such as ELA, MATH, Science, Notes, and teacher comments. The front page of the planner includes the academic calendar, information about what makes HCLA difference, it describes Eagle Pride and it explains the AVID WISCOR strategies which are Writing, Inquiry, Collaboration, Organization, and Reading. Students who previously used the customized planners have found them to be very useful. It also works well for teachers in assisting scholars with organization as all planners are designed the same and its layout encourages daily and weekly organization.

HCLA-Wake will follow the North Carolina Standard Course of Study in all content areas; however, it plans to personalize its curriculum delivery to meet the needs of the targeted population immersioning the strategies and techniques referenced above and others. A *proposed* partnership with Duke University and Dr. Jim Poole in the FASTBRAIN Project and with the Hill Center (Durham) on enhancing student reading will ensure that HCLA-Wake staff will be uniquely qualfied to support all scholars especially those identified as having special needs related to ADHD, Autism, and other unique learning needs and styles.

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HCLA-Wake will also be a trauma-informed school that also focuses on mindset and mindfulness. Also, as a trauma-informed school, it will embrace as a component of its academic framework the concept that for many students their outside-of-school relationships and environments cause them to experience trauma frequently or infrequently which may impede their ability to learn while at school. As a trauma-informed school, HCLA-Wake staff and students will be trained on what it means to be a trauma-informed school which means that the school's leadership and staff will have an understanding of what constitutes trauma, how to recognize it, and and how to respond to its effects on a child's ability to learn.

In addition, scholars will be exposed daily to the principles of ethics, character-based service leadership, and integrity as integral components of their learning process. The Board and the planning team believe that these techniques along with others discussed throughout this application uniquely prepare HCLA-Wake to meet the learning needs of the targeted student population in Northeastern and Eastern Wake County.

Q105.What will be the total projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect when compared to the Local Education Agency (LEA) of the same offered grade levels? (i.e. If the proposed school will be grades 9-12, only compare the total enrollment to the total enrollment of the LEA in grades 9-12).

The total projected enrollment of HCLA-WAKE at the point of maximum capacity will be 600 students. The school will begin with 440 students the first year in Grades K-6, 520 students the second year in grades K-7, and 600 students in grades K-8 the third year and each year thereafter. The school's maximum capacity is a total of 600 students. According to estimated enrollment data from Wake County Public Schools for the 2019-20 school year, their total enrollment is 161,907 students. The proposed enrollment of HCLA-Wake, once it reaches full capacity, will be 600. That represents approximately .0037 percent of Wake County Public Schools district's total enrollment. For K-8 schools with approximately 90,000 students total enrollment, 600 students represent approximately .0066 percent of the total K-8 Wake County poublic schools' enrollment.

#### **Applicant Comments:**

No Additional Comments



# 2022 NC CHARTER APPLICATION NC Public Charters



Q106.Summarize what the proposed school will do differently than the schools that are now serving the targeted population. What will make this school unique and more effective than the currently available public-school options?

HCLA-WAKE will use the North Carolina Standard Course of Study Standards and resources in every content area; however, it proposes to use a variety of resources, strategies, techniques to meet the learning needs of the targeted student population. A stated throughout this application, it is the belief of the Board and the planning team that research-based programs used in the classrooms such as AVID, ZEARN Mathematics, the use of digital tablets/computers for blended learning and proven digital programs such as KHAN Academy and IXL at every grade level for supplementary reinforcement and the training of all teachers in each of the content area using "Teach Like A Champion 2.0" and the high expectations for all students will provide the targeted students at HCLA-Wake with an advantage in their strive for academic success. Many of the base schools in Northeastern and Eastern Wake County appear not to be meeting the academic needs of its students as is evidenced by many of the schools' performance according to the 2018-19 North Carolina Public Schools Report Cards.

Based on data from the 2018-19 North Carolina Public Schools Report Cards, many of the base schools in Northeastern and Eastern Wake County are currently not meeting the academic needs of all of their students as is evidenced by their letter grades of Ds on the 2018-19 NC School Report Cards. The following schools located in Northeastern and Eastern Wake County received a letter grade of D on the 2018-19 NC Report Cards: Baileywick Road Elementary, Beaverdam Elementary, Douglas Elementary, Forestville Road Elementary, Hodge Road Elementary, Lake Myra Elementary, Lockhart Elementary, Millbrook Elementary, Powell Elementary, Rogers Lane Elementary, Wakelon Elementary, Wendell Elementary, Wilburn Elementary, Wildwood Elementary, Zebulon Elementary, East Millbrook Middle, East Wake Middle, Dillard Drive Middle, and River Bend Middle.

HCLA-Wake proposes to set forth an academic program that will be rigorous, research-based, engaging, and motivational. Our instructional program will meet our scholars where they are but we will have high expectations in that we will expect each scholar to maximize his/her potential at all times.

Q107.Describe the relationships that have been established to generate support for the school. How have you assessed demand for the school? Briefly describe these activities and summarize their results



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Members of the HCLA-Wake Board and planning team have had discussions and conversations with parents, neighbors, friends, fellow church members, and community leaders in addition to meetings in Northeastern Wake County with community groups and church groups to share information about the proposed school and how it will differ from the Wake County Public Schools, other charter schools in the area, and private schools in the area. All meetings and contacts have resulted in parents and guardians expressing concerns about the lack of engagement, the lack of expectations, and the lack of educational options for special needs children and children who are high-poverty minority students.

Many have expressed concerns about the current state of public education in Northeastern and Eastern Wake County. Many Board members, planning team members and concerned citizens have lived in the Northeastern and Eastern Wake County communities for many years and have watched the options for a quality public education decrease in the last five years to where there are no other educational options for students who descendants in demographics categories such as high-poverty, ADHD, Autistic, and minority groups such as Black/African American, some mixed-race groups, and some Hispanic groups from Central and South America as well as the Caribbean Islands. Students in these categories make up the majority of students at many of the low-performing schools in Northeastern and Eastern Wake County. Parents in the targeted communities have indicated that they are anxious and look forward to having access to more public education options available in their community for their children to receive a quality education. HCLA-Wake's planning team and Board members believe that based on their response so far, that the community will send their children to a public charter school in the area if the school such as HCLA-Wake has a rigorous academic program that is engaging and responds to the needs of the targeted population in the community.

### **Applicant Comments:**

No Additional Comments

# Q108.Attach Appendix A: Evidence of Community/Parent Support.

- Provide evidence that demonstrates parents and guardians have committed to enrolling their children in your school.
- You must provide evidence through a narrative or visual of this educational need through survey data, or times and locations of public meetings discussing this proposed



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#### charter school.

• (Please do not provide more than one sample survey form).

☑ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

**Total Files Count: 5** 

#### **Applicant Comments:**

Panel members are attaching some evidence that members of the HCLA-Wake Board and team have contacted parents, families and concerned community residents in Northeastern and Eastern Wake County who have expressed an interest in enrolling their children in HCLA-Wake. As stated previously, many parents/guardians and community residents expressed concerns about the limited options available to students with some special needs, for students from high-poverty Black/African American and Hispanic sections of the communities in the area to receive a high-quality education as there were five years ago. Team members have been told that students who are eligible to receive free/reduced meals are not eligible to be placed in a magnet school outside of their immediate area or base-school community. Many parents have expressed concerns about the Wake County Public Schools Policy that prevents economically disadvantaged children from attending magnet schools outside of their base area and look forward to seeing more public school options available in Northeastern and Eastern Wake County communities.

Additional signed Petitions of Support documents are available but due to the size of the file, it is not possible to upload all of them.

#### **Applicant Evidence:**



Petitions of Support....

Uploaded on **4/17/2022** 

by Mildred Bazemore

# 8.2. Purposes of the Proposed Charter School

Q109. Select one or more of the six legislative purposes the proposed charter will achieve, as specifically addressed in the NC charter school statute GS 115C-218, and the proposed school's operations. The Six Legislative Purposes of a Charter School are:



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Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.
☐ Hold schools accountable for meeting measurable student achievement results.
<ul> <li>Provide parents and students with expanded choices in the types of educational opportunities that are available within the public-school system.</li> </ul>
☑ Improving student learning.
<ul> <li>Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.</li> </ul>
☐ Encourage the use of different and innovative teaching methods.

Q110.Provide a brief narrative to coincide with <u>each</u> applicable legislative purpose(s).



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While the HCLA-Wake Board and planning team hope to create a viable public education option for families, parents, and students in the targeted Northeastern and Eastern Wake County communities, its main purpose is to (4) improve student learning for the targeted student population.

The HCLA-Wake Board and planning team believe that many aspects of our school's educational plan will uniquely meet the needs of and enhance the skills of the targeted student population to motivate them to acquire a love for learning and to improve their academic performance.

First of all, teachers at HCLA-Wake will receive intense training on understanding the North Carolina Standard Course of Study and its resources for instructional delivery of the standards for the grade level and content they are expected to teach focusing on what students should know and be able to do at the end of the academic year. This will occur for each newly hired teacher prior to their entry into the classroom as a teacher. Each teacher at the AVID certified school will be taught the Executive Functions of Student Success as espoused by the AVID program from a teacher's perspective including setting up effective physical classroom structures and learning environments for students, effective practices dealing with the logistics of assigning and collecting homework, managing resource materials and time management, including activities and projects completed using digital tablets/computers. Teachers will be trained and will be expected to model organizational strategies for their students with the expectation that evidence of scholar behaviors related to organizational skills will be monitored by teachers in and outside the classroom throughout the school year.

Teachers will be trained on the use of digital platforms such as ZEARN Mathematics, Khan Academy, IXL in the applicable content areas and on using digital tablets/computers and platforms to support instructional delivery in the classroom and outside of the classroom in completing homework, activities and projects. Also, teachers will be trained on the book "Teach Like a Champion 3.0" by Doug Lemov from "Uncommon Schools" as well as the "Teach Like a Champion Field Guide 3.0" by Doug Lemov, Joaquin Hernanandez, and Jennifer Kim. The Field Guide is a practical resource guide for teachers on building effective instructional strategies and includes 75 videos. In addition, since HCLA-Wake will be a trauma-informed school in which teachers will be trained on understanding that within a high-poverty community many students lives may involve experiences with trauma in the home and/or in the community sometimes daily. Teachers at HCLA-Wake will be trained on strategies to use when working with students who are or have experienced trauma including internalizing the effects of trauma and how it impacts student learning. It is the belief of HCLA-Wake Board members and planning team that to implement an effective program to improve student



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learning, it is important to begin the focus with the training of the teachers. In addition to preclassroom professional development activities, teachers within a grade and teachers teaching the same content at different grades will be scheduled common planning periods sometimes weekly but surely periodically throughout the year for professional learning communities (PLCs) meetings to facilitate instructional discourse, alignment, and articulation. The goal is to ensure that all teachers at the school have a toolkit of strategies for instructional delivery that they will be able to use to meet the needs of all students at the school especially the targeted student population regardless of their level of functioning when they enroll at the school.

# **Applicant Comments:**

The information stated above provides a description of the strategies, techniques, programs HCLA-Wake will use to improve student learning and at the same time provide a viable public school option for students, parents, and families in the Northeastern and Eastern areas of Wake County. Data provided show that many of the non-magnet schools in that section of the Wake County are low performing and obviously not meeting the academic needs of students in those communities. The members of the HCLA-Wake Board and planning team believe that the strategies being proposed will provide differentiated instructional delivery to Black and Brown students in those communities who are low achieving and from economically-deprived neighborhoods. HCLA-Wake will ensure that teachers are well-trained to work with children with special learning needs and that they understand how trauma impacts learning and how to support children who have experienced trauma (whether physical abuse, sexual abuse, emotional abuse, physical neglect, emotional neglect, mental illness divorce, substance abuse or death of love one) while at the same time teaching a rigorous curriculum and maintaining high expectations for all students including the ones who have experienced trauma.

# 8.3. Goals for the Proposed Charter School

Q111.Provide specific and measurable goals for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.



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Heritage Collegiate Leadership Academy-Wake has set several preliminary goals for the school's education program using the SMART goals system; however, the goals will be re-examined at the point the school is getting ready to open at the beginning of the 2023-24 academic year. The governing board, the school's leadership and select staff members at that time will again use the SMART goal system to re-evaluate the goals based on the actual students planning to enroll in the school at that time. The school will use the student performance data to help in defining what the revised actual SMART goals should become. For now, and for the purpose of this application, the preliminary goals are set as follows:

- 1. HCLA-Wake will meet or exceed the expected growth on the NC School Report Card for the year that ends the 2025-26 academic year;
- 2. HCLA-Wake will receive a school letter grade of "C" or higher on the NC School Report Card at the end of the 2025-26 academic year;
- 3. HCLA-Wake will achieve a gain of plus "1" percentage points on its overall academic proficiency (Levels 3, 4, and 5) on the ELA End-of Grade Assessments at the end of the 2025-26 academic year;
- 4. HCLA-Wake will achieve a gain of plus "1" percentage points on its overall academic proficiency (Levels 3, 4, and 5) on the Mathematics End-of-Grade Assessments at the end of the 2025-26 academic year;
- 5. HCLA-Wake will achieve a proficiency percentage that is at or above the State overall percent proficient on the Grade 5 Science End-of-Grade Assessment at the end of the 2025-26 academic year; and
- 6. HCLA-Wake will achieve a return rate of at least 95 percent on the Teacher Working Conditions Survey at the end of the 2025-26 academic year.

The Executive Director of the school, along with the school principal, will communicate to the governing board the school's performance towards meeting its goals throughout the year at monthly board meetings as is applicable and appropriate or as data are available.

Goals will be re-evaluated at the beginning of each sacademic year to ensure that they are appropriate and aligned with the expectations and requirements of the NC Department of Public Instruction and the Office of Charter Schools.



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### **Applicant Comments:**

No additional comments.

# Q112. How will the governing board know that the proposed public charter school is working toward attaining their mission statement?

HCLA-Wake's governing board will know that the school is working toward attaining its mission in numerous ways:

The school's leadership will be required to report to the school's board of directors periodically a brief summary of how school's spending, activities, professional development, events relate back to the school's mission. That periodic brief reports will enable the board to get a sense of how well the school is encouraging staff and students to keep the mission in mind as they go about their daily business of making decisions and planning activities. In addition, the school's leadership will briefly summarize for the board a brief report from time to time of any activities, events, purchases, site visits, training, professional development, from the month prior to the board meeting that students and/or staff were involved in and how the activities or events relate back to the mission statement for the school. For instance, reports can be made about field trips to a college/university or community college, a field trip to a rest home in the community, students involved in internships, student volunteering at a food bank, students meeting with a politial candidate in the community, career day event at the school, a science project on ways of preserving water at the school, students taking leadership on recycling plastic containers at the school and any purchases of items that are justified by relating the items back to the school's mission. The goal is to encourage staff and scholars to make mission-driven decisions as they go about their business of promoting student learning.



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# 9. Educational Plan

# 9.1. Instructional Program

Q113.Provide a detailed description of the overall instructional program of the proposed charter school, including:

- major instructional methods
- assessment strategies, and
- explain how this instructional program and model meet the needs of the targeted student population



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# A. Major Curricular Focus and and Instructional Methods

HCLA-Wake will follow the North Carolina Standard Course of Study curricula standards and will use NCSCS instructional support materials as the basic guide for its grade-level curriculum and instructional delivery for all grade levels and all content areas to the extent that such resources are available.

Other resources, media, methods, techniques, strategies, and programs described within this application in the various sections will be used to enhance the delivery of those curriculum standards and to ensure that instruction can be differentiated to meet the learning needs of every child at the school including those students with specific learning needs, those who are gifted, those with autism, and ADHD as well as those other students who because of past learning delays may require an approach to learning that differs from others in the classroom. In addition, the staff at HCLA-Wake will ensure that the scholars who are achieving at grade level do not lose their learning momentum in every content area and at every grade level. Teachers at HCLA-Wake will be trained at the beginning of the school year or upon their entry as a classroom teacher, on the standards from the NC Standard Course of Study beginning with clear expectations of what each child should know and be able to do at the end of each academic year in every content area and at each grade level. This emphasis initially will be placed on training teachers on (1) the "who" which will be made clear that it is expected that every child can learn with an expectation that every child will be able to learn to realize and to maximize his/her potential regardless of who they are, what their disability is, or where they come from; (2) the "what" is to be taught references the content standards and the learning expectations that every child has the opportunity to learn grade-level content standards which provides the basis for what children should know and be able to do once they have completed an academic year at a grade level in a specific content area; (3) the "where" meaning at which grade level and under which conditions to ensure equal access and opportunity for every scholar at the school, (4) the "when" is during which quarter according to staff generated pacing guides and the progression from the beginning to the end of the quarter and across quarters to the end of the academic year to ensure alignment from teacher to teacher who may be teaching the same content at the same grade level and vertical articulation for teachers who are teaching the same content at grade levels above and below to provide continuity for quarterly interim assessments, mid-year assessments, and end-of-year assessments for each academic year; and (5) the "how" will focus on the different strategies and methodology teachers will be expected to use to provide the appropriate instructional delivery to ensure that every child has equal access and opportunity to realize and maximize their learning potential. Not every child will be expected to learn using every strategy, but the expectation is that each teacher has a full array of instructional



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strategies in their toolkit from which to draw to meet the diverse learning needs of the diverse targeted student population the school is expected to enroll in Northeastern and Eastern Wake County, especially the students identified as ADHD (Attention Deficiet Hyperactive Disorder), scholars who are English language learners, and for students who typically are undeer achievers and students who come from economically- disadvantaged communities.

The "**how**" of the school will be based on a basic staff mindset that is supported by the following tenets:

- (1) All scholars can learn and therefore should have equal access and opportunity to realize and maximize their potential to learn though their pace and learning styles may differ.
- (2) As a trauma-informed school, we understand that many scholars from our targeted communities come from homes and communities where they experience trauma almost daily so as a staff, we are to support these students through engagement, counseling, and coaching, as needed, with the understanding that experiencing trauma has an impact on student learning but does not prohibit a student from learning.
- (3) All assigned academic projects, all school-sponsored events, and field trips should keep in mind the goal(s) to be achieved and how the activity connects back to the school's mission, vision, and academic goals.
- (4) Every scholar has the right to academic challenge, rigor, and instructional engagement regardless of whether their path after middle school is career-focused or college-focused.
- (5) As a no-excuses/high expectations school, the emphasis will be on high expectations for scholars' behavior as well as academics which will be enforced schoolwide using the highly structured positively-enforced disciplinary **PBIS** (**P**ositive **B**ehavioral **I**nterventions and **S**upports) model.
- (6) Technology and digital educational (online) instructional opportunities are to be combined with traditional classroom instruction, at every opportunity, through the Blended Learning Model of instruction to enhance and expand student learning.
- (7) The school will provide a cultural platform that promotes the cultural and ethnic pride of all scholars with the expectation that each group's culture is to be respected by other scholars and staff; and,
- (8) Every staff member at the school, regardless of what they do, has an impact on scholar learning



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at the school.

HCLA-Wake is committed to meeting scholars where they are, regardless of what their life goals are, and taking them along a journey to maximize their potential regardless of their ability level. The school will ensure experiences along the way that will help scholars to make real world connections to what they have learned in the classroom or on their digital support device regardless of whether they are using a tablet, a laptop, or some other digital device. The school makes the commitment to develop the whole child addressing their academic, social, emotional and behavioral needs throughout their learning experiences while enrolled.

Some of the instructional strategies that teachers at HCLA-Wake will be trained to use in addition to the others described throughout this application include the following:

- (1) AVID (Advancement Via Individual Determination)-as a schoolwide approach in grades K-8 and then electives for students beginning in grade 5-8. An instructional system that empowers students with the knowledge and skills to take charge of their own learning. When students are empowered to understand themselves as learner, it begins the journey of them becoming self-directed and intrinsically motivated learners. AVID schoolwide works through four key domains of operations: Instruction, Systems, Leadership and Culture. Teachers will be trained on AVID delivery as an instructional method at the beginning of the year with an expectation that there will be implementation and discussions relative to its premise and impact on student learning throughout the school year. As a schoolwide implementation model, it is expected to help educators integrate high-engagement college-preparedness strategies into all classrooms which will provide opportunities to all students regardless of their path through high school and beyond. By school opening in August 2023, AVID's strategies will become available digitally for future implementation at the classroom level and will include STEM connections and strategies.
- (2) Critical Thinking Strategies and training that involve a variety of methods such as Paideia Socratic Seminars, Debate across the Curriculum, Writing Across the Curriculum, Competitive Debate, Philosophy Chairs, Collaborative Study Groups and Impromptu Public Speaking, TED Ed Student Program. TED -Ed Talks will spark the curiosity of learners and inspire them to use their voices to share their ideas with the world. In this program students will learn how to discover, explore, and present their ideas in the format of TED-style talks. These strategies are expected to be introduced in early grades and to become fully implemented by grades 6-8. Students building skills in speaking, listening, researching, are all components of the ELA curriculum at every grade-level but are also critical for students to demonstrate critical thinking and student leadership.



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- **(3) Digital Programs** will be used throughout the year with all students. Digital programs such as ZEARN Mathematics for digital standards-based instructional support and strategies for internalization, for independent practice and for reinforcement in all mathematics content at all grade levels, IXL standards-based instructional support, and assessments in all content areas and at all grade-levels in addition to digital opportunities for independent practice, and Khan Academy for digital instructional support and assessment strategies for all content standards at all grades levels as well as digital opportunities for independent practice, will all be used routinely to support instructional delivery in the classroom and at home using digital support devices.
- **(4)** A major emphasis will be to train all teachers and support staff on the 62 techniques of Doug Lemov of Uncommon Schools in "**Teach Like a Champion 3.0**" Book and Field Guide with a emphasis on meeting scholars where they are in order to keep them motivated. In addition, each teacher will be assigned a loaner copy of the book and field guide each year. In addition, teacher "PLCs" additional training will be provided throughout the year during the "PLCs" (Professional Learning Community) meetings in which teachers and academic coaches are expected to work collaboratively in recurring cycles of collective inquiry and action research to achieve better results for the scholars they serve.

**Curriculum Emphasis:** The existing North Carolina Standard Course of Study will provide the basic framework for the academic content taught at HCLA-Wake at grades K-8. Even though the state's standards will provide the framework for the academic content and focus, there will be an expectation of academic rigor in which students will be required to demonstrate mastery by developing and presenting academic projects that are meaningful, real-world, and that integrate knowledge and skills from all students and ensuring a high degree of learning. Students will be required to use information from every discipline to learn to conduct research, write, present, and sometimes debate in the development of their academic projects. An emphasis will be on reading, writing, speaking including debating, thinking critically, inquiry, organization, categorization, and problem-solving in all of the content areas.

(1) English Language Arts Grades K-8: Even though the State Standards will provide the basic curricula framework, there will be an expectation of academic rigor in which students demonstrate critical thinking as they develop real-world projects and the leadership that they can take charge of much of their own learning as well as demonstrate mastery on the interim (State Check-ins or similar interim assessments) and state end-of-year assessments. The knowledge and skills students will learn in ELA will be applied in all content areas as they learn to practice they what they know and are able to do in conducting research, writing reports, speaking, thinking critically, and



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debating across the curriculum with those skills applied especially in grade level literature, science and social studies. Latin will be infused in with the teaching of ELA to enhance students' vocabulary and to build skills in determining the meaning of words;

- (2) Mathematics GradesK-8: The mathematics standards by grade will be followed in grades K-8. Teachers will be trained on delivering the mathematics curriculum in an interdisciplinary manner with a focus on applying concepts in real-world situations and situational problem-solving as well as in STEM (Science, Technology, Engineering, an Mathematics) integrating technology, digital platforms, scientific concepts and inquiry. Across the curriculum mathematics concepts such as data analyses, data presentation, and drawing conclusions based on data will be integrated across the curriculum with the basic concepts learned in mathematics in grades K-8. Teaching mathematics through STEM has the expectation that it will lead to new ideas and innovations as well as encourage teamwork, the use of technology, and the use of data;
- **(3) Science Grades K-8:** Students in grades K-8 will also be taught Science and scientific inquiry also using a similar method as in mathematics through STEM and using a interdisciplinary approach;
- **(4) Social Studies Grades K-8:** Social Studies will be taught in grades K-8 using the state standards as the framework for the content. It is expected that this content will also be taught using academic rigor, critical thinking, and an understanding of where places are, how the world works, and the role of the economic, legal, political, and other systems on every aspect of life. Skills learned in English Language Arts, Mathematics, science, and technology are to be used in social studies to ensure full engagement of all scholars in the learning of the content and concepts related to the social studies' academic framework.
- **(5) Physical Education, Health, Nutrition:** All students will have weekly exposure to physical Education, Health Education, and Nutrition on a rotating basis because the Board and members of the planning team believe that it is critical that all students are informed in this area and that information is shared with families and members of the communities in order to contribute to a more knowledgeable an therefore healthier community.
- **(6) Music Genres Appreciation or Fine Arts Appreciation:** will be taught to each scholar at least weekly and on a rotating basis to ensure that scholars learn, understand, and appreciate the different art forms and to encourage scholar involvement and participation in cultural events in the It is the belief of members of the Board, and it has been the experience of educators involved on the planning team that exposure to art and music while in the learning environment makes the learning experiences more versatile and engaging.



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- (7) Foreign Languages: Students will be offered one of two foreign languages at least weekly in the areas of Mandarin Chinese or Spanish at each grade level. Mandarin Chinese is being offered because of its use in the global marketplace and Spanish because of its common use in the community as a second language and because of its use in the local and global marketplace.
- **(8) Character Education:** will be offered to scholars through weekly community learning circles in which instruction, discussions, and activities focus on building character through appropriate behaviors, values, personal growth, development, and leadership.

# **B.** Assessment Strategies:

Scholars at HCLA-Wake will be assessed for progress and mastery throughout the academic year using some teacher-made assessments, IXL digital standards-based assessments and any approved NCDPI interim assessments such as the NCDPI NC Check-Ins interim assessments. All student assessments will be aligned to the standards taught during a given quarter or semester which will be determined using a content and instructional alignment process that involves teachers and school leaders working collaboratively to ensure test validity and alignment. In addition, HCLA-Wake will participate in all required end-of-grade state-mandated accountability assessments. Also, the school will participate in any special assessments required for students with special needs either because of a disability or because they are English Language Learners.

# C. Meeting the Learning Needs of the Targeted Populations:

While the planning team and Board fully understand that not every child will have access to or will benefit from all of the strategies, methods and techniques described in this application, many will. It is the belief of the experienced educators on the team that AVID with its emphasis on structure and organization, planning and building routines for teachers and scholars will contribute short-and long-term to improving student learning for the scholars of HCLA-Wake and its targeted population, who are students from traditionally underserved communities in Northeastern and Eastern Wake County. The use of digital resources routinely for each scholar for problem-solving and conducting research, the belief that all children can learn, conducting interim assessments to monitor students' progress and mastery along the way, using data to inform instructional focus along with differentiated teaching and learning in order to meet scholars where they are, will all contribute to improving student learning for the targeted population of traditionally underserved students from Northeastern and Eastern Wake County communities.

# D. Professional Development:

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At HCLA-Wake, emphasis on routines and procedures will be expected of the teachers and other adults on staff as well as the scholars enrolled at the school. The school's teaching staff and support staff, supported by the Board, will be provided professional development at the beginning of the school year and throughout the year to ensure they are comfortable employing their toolkit of strategies, methods, and techniques described within this and other sections of this application. Several experienced educators included on the planning team of the school have experience in training and working with staff on the implementation of the strategies, methods, and techniques described in this application as a focus of their professional development which includes their PLCs (professional learning communities).

HCLA-Wake will ensure that teachers are well-trained to work with scholars with special learning needs and that they understand how trauma impacts learning and how to support children who have experienced trauma (whether physical abuse, sexual abuse, emotional abuse, physical neglect, emotional neglect, mental illness divorce, substance abuse or death of love one) while at the same time teaching a rigorous curriculum and maintaining high expectations for all students including the ones who have experienced trauma.

# **Applicant Comments:**

No additional comments.

Q114.Will the proposed charter school serve a single-sex student population?

- Yes
- No

# **Applicant Comments:**

No additional comments.

# Q115.What is the objective of the single-sex charter school?

HCLA-Wake will not be a single-sex charter chool.

Q116.How is the charter school's decision to limit admission to a single sex related to that objective?



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HCLA-Wake will not be a single-sex charter chool.

Q117.What facts support the charter school's determination that limiting admission to a single sex will help it achieve its objectives?

HCLA-Wake will not be a single-sex charter chool.

Q118.Curriculum and Instructional Design Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade span (i.e. elementary, middle, high) the school would ultimately serve.



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HCLA-Wake will have a basic learning environment that is classroom-based typical teacher-directed classroom setting where the expectation is that there will be no more than approximately 25 scholars per class. Students will learn to work individually/independently and in small groups while participating in the classroom and while working on their academic projects. The school will have a physical education area and at least two technology labs through which all scholars will be expected to rotate. The instructional setting is expected to make use of multiple technologies such as computers, tablets, Smart Boards, and other digital learning programs and platforms. Also, the instructional setting will be set up to support remote learning opportunities on an as needed basis. At HCLA-Wake, a great deal of the scholars' independent practice (homework and classroom practice) will be conducted using digital programs such as IXL and teacher-created digital assignments.

Scholars will receive most of their classroom assessments using digital programs and platforms including their interim and end-of-year assessments as well as their standards and unit-based assessments. Data from all classroom-administered assessments will be used to inform instructional decisions for individual scholars as well as groups of students. HCLA-Wake plans to provide daily extended hours of instruction as the academic school day will begin at 8:00 a.m. to 3:30 p.m. for all scholars to provide time for any necessary instructional intervention student with special needs as well as enrichment opportunities for identified AIG students. The school will be in session for 185 days and/or 1025 hours for each academic year. The school will have primary, elementary, and middle school components (K-8) in its operation. The basic academic curriculum/instructional framework will be the North Carolina Standard Course of Study for all grades and all content areas, as appropriate.

Classrooms at HCLA-Wake will reflect school-wide systems, routines, structure, and procedures to support student learning. Each classroom's whiteboard will be arranged using the same format consisting of the date, the AIM, the agenda, and homework for the day. Teachers will also plan their lessons to be consistent with units, AIMS (desired outcomes), and objectives during common planning sessions directed by the school's instructional leadership team to ensure continuity and alignment from classroom to classroom and vertical articulation from grade to grade.

# **Applicant Comments:**

No additional comments.

Q119.Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. Provide evidence



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that the chosen curriculum has been successful with the target student population, how the plan will drive academic improvement for all students, and how it has been successful in closing achievement gaps.



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Heritage Collegiate is committed to fulfilling its mission to its scholars and the community its serves. As such, the curriculum it proposed to offer aligns with the school's mission, its proposed targeted student population, the North Carolina required assessments, and the North Carolina Accountability Model.

The North Carolina Standard Course of Study content standards will provide the basic academic content framework for each content area at each grade level taught at the school. These standards align with the school's mission, the school's goals, the state-required assessments, and the North Carolina Accountability Model. The data from the state assessments in the North Carolina State Report Cards from 2018-19 show that many schools in the state that follow the state curriculum are successful with Black and Brown students from low-income households who have special needs and may have been low performing at other schools. We believe that the difference is the school's plan based on its belief as depicted in its tenets and the numerous strategies, methods and techniques described in this application it plans to train teachers to use to meet scholars where they are and in providing the necessary support to help each scholar to maximize his/her potential. The proposed education plan for HCLA-Wake will be instrumental in helping all scholars at the school to become successful and will help to close the academic achievement gap for the targeted populations and other students in Wake County and North Carolina.

The Board and planning team believe that all scholars can learn and should have the support they need at school to assist them in being able to maximize their potential. All scholars will be prepared at each grade level as they progress through the educational system regardless of whether their goal is to complete college and then enter the world of work or enter a career straight after high school. Providing students with equal access and opportunity to learn challenging and rigorous concepts, ideals, and skills will prepare them regardless of the academic pathway they choose. Using academic content materials that focus on critical thinking, creating organizational systems and structure for themselves, building character, and have opportunities to build leadership skills will prepare scholars for their next level regardless of what that next level may be. Scholars at the school will receive training on building leadership skills and an ethical philosophy to support their character development. Concepts from the Kidlead Research Project by Dr. Alan Nelson will be used to work with teachers to work with scholars to build their leadership skills and to help them to develop a sense of purpose beyond themselves that is greater than mere social and economic attainment. HCLA-Wake will work with scholars to help them understand their role as citizens in their local community and in the world at large and how they are to prepare to fulfill their responsibility as future leaders and how what they do will in the future will impact their local communities and society at large.



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The Board and the planning team believe that the educational plan proposed for the school ties back to its mission, will help to improve the learning of all scholars at the school, will improve the learning of scholars with special needs and is aligned to the state assessments and the North Carolina Accountability Model. Also, we believe because this plan will improve the learning of all students at the school, it provides strategies that will help close the achievement gaps between students who are traditionally underserved and students who are motivated and and reside in more affluent communities.

# **Applicant Comments:**

No additional comments.

Q120.Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population for each grade span (i.e. elementary, middle, high) the school would ultimately serve.



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Heritage Collegiate will expect all its staff to be fully trained on the use of and to master innovative instructional strategies to help scholars become successful and to fulfill its mission, purposes, and goals. It is expected that teachers will participate in mandated professional development and other experiences to learn how to increase the rigor and engagement of their instructional delivery, to improve their content skill level, and to increase the academic achievement of their students. The staff of HCLA believes that the inclusion of these strategies will maximize the educational opportunities for all scholars at the school.

After being provided with the appropriate professional development, instructional support and coaching throughout the year through PLCs (Professional Learning Communities) collaborative sessions, and using resources such as the Teach Like a Champion 3.0 Resource Manual and Field Guide, the primary instructional strategies that the school will expect teachers to master are described below:

(1) AVID (Advancement Via Individual Determination) as a schoolwide investment and approach in grades K-8 with electives being offered for students beginning in grade 5-8. AVID is an instructional system that empowers students with the knowledge and skills to take charge of their own learning. When scholars are empowered to understand themselves as learner, it begins the journey of them becoming self-directed and intrinsically motivated learners. AVID schoolwide works through four key domains of operations: Instruction, Systems, Leadership and Teachers will be trained on AVID delivery as an instructional method at the beginning of the year with an expectation that there will be implementation and discussions relative to its premise and impact on student learning throughout the school year. AVID as a schoolwide investment is expected to help educators integrate high-engagement college-preparedness type strategies into all classrooms regardless of the content which will provide rigorous opportunities for all students regardless of their pathway through middle school, high school, and beyond. AVID instructional strategies more commonly known as WISCOR, which is an acronym for Writing, Inquiry, Collaboration, Organization, and Reading, provides a learning model that educators can use to guide students in comprehending concepts and articulating ideas at increasingly complex levels. In addition, for schools who are investing in implementing AVID school-wide, the AVID Center has available AVID STEM Connections that will offer lesson plans, activities, and ancillary materials to support teachers and students which will make it easier to incorporate STEM experiences into daily classroom activities across all content areas in grades K-8. Regardless of the pathway a scholar at HCLA-Wake chooses, career preparation or college preparation, HCLA AVID scholars will be prepared to become thoughtful and skillful problem solvers ready for the college and/or careers of the future regardless of their choice. HCLA-Wake will use the AVID Summer Bridge Programs to enhance its summer school programs and



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Saturday Academies with a goal to offer high level and real-world engagement in ELA, Science, Math, and Social Studies content experiences designed to accelerate learning by enhancing scholars' critical thinking, reasoning, problem-solving skills through interactive and collaborative lessons and activities. AVID, as a tool, will become one of the major emphases for instructional delivery and support at HCLA-Wake.

It is expected that HCLA-Wake will offer a comprehensive summer school program each year with an emphasis on academic intervention as well as academic acceleration. In addition, HCLA- Wake will offer half-day Saturday Academies at least once a quarter throughout the academic year.

- (2) Digital Programs/Blended Learning Digital programs such as ZEARN Mathematics will provide digital standards-based instructional support and strategies for internalization, for independent practice and for reinforcement of all mathematics content at all grade levels. IXL as an instructional support tool is also a standards-based digitally presented instructional support system with selfpacing assessments in all content area and at all grade levels in addition to digital opportunities for independent practice at school and while at home using their assigned tablet with feedback provided to their teachers electronically via of the internet. Khan Academy, as an option and at teacher discretion, can provide supplemental instructional support and assessment strategies for all content areas at all grade levels. It, too, provides opportunities for additional independent practice at home with immediate feedback to the scholar's teacher and parents, if desired. In addition, the digital tools such as the tablets, computers, smartboards for classroom use, will provide additional opportunities for scholars to access external resources when conducting research to collect data, information, and to complete assigned projects as a component of their project-based learning in every content area and at every grade level. Using Digital Tools is one of the methods HCLA-Wake will use to ensure that every scholar has access to external resources to enhance their learning and learning experiences.
- (3) Teach Like a Champion 3.0 Techniques (62 Techniques) Every teacher at HCLA-Wake will be expected to master most of the 62 techniques laid out in "Teach Like a Champion 3.0" by Doug Lemov and in Teach Like a Champion Field Guide by Doug Lemov, Joaquin Hernandez, and Jennifer Kim from UnCommon Schools. These professional guides include videos of "How to Make the Teach Like A Champion 3.0 Techniques Your Own." Teachers at HCLA-Wake will work together prior to school opening and work collaboratively throughout the year in PLCs (Professional Learning Communities) to make these techniques their professional reality and a part of their instructional toolkit.
- (4) High Expectations Model At HCLA-Wake it is expected that every teacher and every staff



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member at the school believes that every child can learn, and it is the responsibility of the school staff and teachers at the school to meet them where they are and teach and coach them into getting where they are trying to go realizing that not every child learns at the same pace. Teachers will use instructional modifications and interventions such as differentiated teaching and learning to ensure that every child has the opportunity to realize and maximize their potential. As a high expectation school, teachers will be trained to reject any and all obstacles for under-achievement and/or poor behavior because to accept less than expected is to lower one's expectations for scholars and what ones' belief is as to what they can do or is capable of achieving. Staff at HCLA-Wake will be trained on and establish a system of PBIS (Positive Behavior Intervention and Support) which is a system to address scholar behavior by shifting from a punishment-based system of "discipline" to one that actively teaches and promotes scholar engagement in desired behavior.

(5) Critical Thinking Skills - Strategies and training will involve a variety of innovative methods such as Paideia Socratic Seminars in which scholars participate in intellectual collaborative dialogue using questions, Debate Across the Curriculum, Competitive Debate, solving problems, making decisions, Philosophy Chairs, Collaborative Study Groups, and impromptu public speaking such as TED Ed Student Program. TED-Ed Talks will spark the curiosity of learners and inspire them to use their voices to share their ideas about and with the world. In this program at HCLA-Wake, scholars will learn how to research discover, explore, and present their ideas in the format of TED-Ed style. These strategies are expected to be introduced in the primary grades and fully implemented by grades 6-Some other strategies teachers at HCLA-Wake will be encouraged to teach scholars to promote critical thinking are encouraging creativity, teaching scholars have to find viable solutions to problems, brainstorming or think tanks projects when students think about what they are going to do before they actually do it, teaching scholars how to classify and categorize, teach scholars to compare and contrast issues and items, teaching students to make real-world connections to whatever concept they are learning, and to provide opportunities for collaboration with small groups with their peers.

The Board and planning team of HCLA-Wake believe that the instructional strategies listed above are critical to set HCLA-Wake apart from other schools in Northeastern and Eastern Wake County in meeting the needs of the targeted population of students with special needs including students with ADHD. Autism. English Language Learners and others who have traditionally been low performing in traditional schools in the community. It is our expectation that teachers learn how to use these methods strategically to work with special populations of students including those who traditionally have been un- or under-motivated to learn. We believe that the use of these strategies after teachers have been properly trained will result in higher academic achievement for all scholars

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at every grade and in each grade span at the school.

# **Applicant Comments:**

No additional comments.

Q121.Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion.

The HCLA-Wake instructional plan will have at its core the same curriculum standards that are offered at traditional schools in North Carolina. It will us the North Carolina Standard Course of Study as the basis for it curriculum framework. This decision has been made by the school's board of directors and planning team to ensure that every scholar is being taught the knowledge and skills that every child in North Carolina should know and be able to do once they complete each grade level content offered at the school. This assures what is being taught is consistent with what is being tested on the North Carolina State Assessments and what is required by the North Carolina Accountability Model. Following the NC Standards Course of Study as the foundation of all that is taught at the school ensures every scholar readiness to transition from grade to grade and from primary, to elementary, to middle school, to high school, college, and beyond.

The instructional strategies contained within this application point to the methods, techniques, and strategies that staff will use to delivery those standards to the scholars attending the school. In other words, it is the pedagogical frameworks that will be used at HCLA-Wake, when teaching, that distinguishes it from other schools. There will be common instructional routines, practices, and procedures that will allow scholars to be able to anticipate the flow of each class at the school. The high level of organization and structure sets scholars up for success regardless of the content or the grade level. At HCLA-Wake, staff will infuse AVID/coaching/mindfulness/growthmindset/character /leadership strategies which will foster a healthy efficacy for scholars which will ensure that scholars approach learning and growth seriously every day and with a high level of motivation.

# **Applicant Comments:**

No additional comments.

Q122.Describe in a brief narrative how the yearly academic calendar coincides with the



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# tenets of the proposed mission and education plan.

HCLA-Wake is committed to serving its scholars for a minimum of 185 days or 1025 hours for every given academic year. The school doors will open at 7:00 a.m. and closed at 4:00 p.m. each school day. The academic day will begin at 8:00 a.m. and end at 3:30 p.m. Students will be excused according to scheduled holidays and teacher workdays which will be included in the academic calendar approved by the governing board. Whenever a school day is dismissed or not convened due to inclement weather or some other emergency, the time will be made up as soon as the school schedule permits but before the end of the academic year as approved by the governing board. The scheduled extended day will be used to accommodate instructional intervention for low-performing scholars at the school and for instructional acceleration for high-performing students seeking additional challenge. The school's proposed extended instructional time is consistent with the requirements of the school's mission and its proposed educational plan.

Also, the Academic Calendar reflects the Saturday Academies which will be held at least once or twice quarterly and will be used to support AVID collaborative projects, STEM collaborative projects and activities as well as other real-world experiences for scholars which may include local field trips as long as they are focused and connect back to the mission and the school's education plan.

# **Applicant Comments:**

No additional comments.

Q123.Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning.



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The structure of the school day may vary by grade to ensure the full use of the Elective Courses to drive our PLCs (Professional Learning Centers) schedule. Elective teachers will have their PLCs at the beginning of each day since the first block will be content courses across the grades. Courses at HCLA-Wake will be 45 minutes long with a 5-minute transition built in. This means scholars will receive approximately 3.75 hours of instruction in each content area per week. The total amount of time for English/Language Arts (ELA) and mathematics will be doubled. In grades 3-8, teachers will teach literacy and Mathematics blocks. ELA and Social Studies (SS) will teach Reading/Literacy Blocks, and Mathematics and Science teachers will teach Mathematics Blocks. Essentially, this means our scholars will receive a total of 7.5 hours per week on mathematics and literacy instruction.

The academic school day is an 8-3:30 schedule. The schedule is optimal for the school day because it affords the time and attention to activities set forth in the education plan and professional development/support plan to ensure all proposed academic activities and get done according to schedule.

Q124.Describe a typical day for a teacher and a student in the school's first year of operation.



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A typical day for a teacher in the school's first year of operation will begin with him/her arriving at school no later than 7:30 a.m. prepared to begin receiving scholars as the academic day begins at 8:00 a.m. The teacher will then begin her morning duties and will use scholar leaders to help make his/her duties less cumbersome. The teacher will prepare scholars to receive breakfast in the classroom noting all scholars who are participating in the school lunch program versus those who do not. Breakfast will be served in the classroom while scholars engage in Morning Mindfulness activities during the Eagle Nest Homeroom Time. Scholar leaders will assist the teacher with the after-breakfast cleanup ensuring that all unused items are returned to the school lunch staff and that all trash is contained in the area allotted for meal trash. Then, the teacher will teach four content classes, having a planning period for PLC time or free planning time. Elective teachers will teach 4-5 content courses unless working parttime. Scholars will be fed during the lunch break which will occur during midday typically after the ELA/Literacy and Mathematics/Science blocks. Lunch, like breakfast, will be eaten in the classroom typically under the supervision of the homeroom teacher. Elective teachers will also have PLC or free planning each day usually in the morning. Like during breakfast, scholar leaders will be assigned to assist the teacher in handing out lunch meals while teacher tallies which scholars are participating in the school lunch program versus those who do not. Once lunch cleanup is completed in the classroom, the teacher will resume her teaching duties. The teacher will continue her teaching duties until around 3:25 p.m. at which time scholars and teacher will prepare for dismissal. The teacher follows school's procedure for dismissal. Students are dismissed to parents/guardians in carpool or prepare to load the awaiting school buses. Once scholars are dismissed, the teacher organizes the classroom to prepare for the next school day. The teacher then leaves the classroom at 4:00 p.m. to go home for the day following the school's procedure on whether to locked or leave the classroom door unlock for custodial cleaning. The leadership of the school will ensure that we are operating with the social and emotional well-being of our teacher in mind as well as that of our scholars.

Each teacher will teach 4-5 content classes daily with a planning period for PLC times or free planning time. Elective teachers will teach 4-5 content courses daily unless working part-time. Elective teachers will also have PLCs or free planning time each day. School staff meeting will be held on Wednesdays. Beginning teachers will meet every other week after school. Mentor teachers will be given coverage during the day by support staff to allow them time to observe less experienced teachers Our goal is to ensure that every teacher's day reflects the school's mission for our scholars; however, because our targeted population may require extra supports, we want to ensure that we are promoting the social and emotional well-being of our teachers in mind as well.

Teachers will be encouraged to use student helpers to carry out some of the logistical duties



# **NC Public Charters**



required in the classroom to ensure efficeency and organization that are non-academic.

Q125.Will this proposed school include a high school?

O Yes	
No	
Q131.Attach Appendix B: Curriculum Outline per Grade Span (for each grade span the school would ultimately serve). One sample curriculum outline (in graph form) in the	
Appendices for one core subject (specific to the school's purpose) for each grade span the school would ultimately serve.	
Upload Required File Type: pdf, image, excel, word, text Max File Size: 30	
Total Files Count: 5	
Applicant Comments :	
Due to the size of these documents, please access our complete curriculum, by content area and	
grade, by accessing the HCLA Livebinder using the information provided below:	
Access all HCLA curricular materials by using the information below: Click on the Link Below:	
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The access code is HCLA.



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# **Applicant Evidence:**



Uploaded on **4/18/2022** by **Mildred Bazemore** 

# Q132.Attach Appendix D: Yearly Academic Calendar (minimum of 185 instructional days or 1,025 hours)

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# **Applicant Comments:**

A sample draft copy of the HCLA-Wake academic calendar is attached that depicts an academic calendar year with a minimum of 185 days or 1025 hours. The academic school day will begin at 8:00 a.m. and end at 3:30 p.m. for all students. The school doors will open at 7:00 a.m. on each weekday Monday through Friday and will close at 4:00 p.m. for staff and students. To the extent feasible, the official HCLA-Wake annual academic calendar will be synchronized with Wake County Public School District's traditional academic calendar including all State and Federal holidays. Whenever school is not able to convene due to inclement weather or other emergencies or disasters, the school's leadership will make the decision of when to close school, but the Board of Directors will decide how and when to make up the time.

The sample academic calendar shows the schedule for professional development as well as the schedule for Saturday Academies which have been described in sections related to instructional strategies.

At the beginning of each school year, the school's academic calendar will begin with professional development for teachers and staff as well as academic planning sessions for teachers and staff. From at least 5 to 8 days will be devoted to these activities while additional time will be devoted to professional development and planning at scheduled times throughout the academic year.

Notices regarding school cancellations for emergencies, inclement weather and other causes will be posted on the school's website and public television stations.



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# **Applicant Evidence:**



Uploaded on **5/18/2022** Uploaded on **5/18/2022** by **Mildred Bazemore** by **Mildred Bazemore** 

Q133.Attach Appendix E: Daily and Weekly Schedule Provide a sample daily and weekly schedule for each grade band (K-5, 6-8, and 9-12) the school ultimately plans to serve.

☐ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

**Total Files Count: 15** 

# **Applicant Comments:**

A sample of the a daily and weekly schedule for each grade band K-5 and 6-8 is attached. These are the grades spans the school ultimately plan to serve.

# **Applicant Evidence:**



# 9.2. Special Populations and "At-Risk" Students

Q134.Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students.



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HCLA-Wake will use strategies such as the Tier 3 Response to intervention (RTI) program that identifies learning differences early in a scholar's academic trajectory. The USED strongly encourages schools to adopt the RTI approach, to avoid excessive classification of low-performing students who do not necessarily have a learning disability as do student with a disability. HCLA-Wake's team members believe that non-severe learning differences can be improved through individualizing/differentiating teaching and learning.

HCLA-Wake's approach is to serve every child daily with over an hour of intervention in the designated Learning Lab where students receive 1:1 and small group instruction with tutors. Consequently, the RTI model results in a smaller number of students being classified as students with a disability as all students are receiving a highly individualized instruction tailored to the unique set of needs and documented in their personal education plan (PEP). At HCLA-Wake, no student will be expected to fall through the crack as through identification, acceleration, and enrichment, all students will be able to realize and maximize their potential. Each student at the school, regardless of their level of academic performance, will have a Personal Education Plan (PEP) which identifies differentiated prevention and intervention strategies especially for students who are NOT achieving grade level performance in reading and mathematics. The PEPs will be closely monitored by the teachers and staff to ensure that the students are realizing established goals.

In areas such as reading and mathematics, students will be given tutorial intervention services, and opportunities for remedial instruction routinely as a component of their extended hours of instruction. All students in ELA and Mathematics will be administered an interim assessment at the completion of their curriculum goals that will provide data to help inform instruction for individual students requiring differentiated intervention strategies.

The entire instructional staff at HCLA-Wake will become involved in developing and implementing strategies for students who are at risk of becoming successful in meeting their academic goals. Teacher-led instructional team meetings will be encouraged to have high expectations for all students regardless of their need for special services. Students who are among the students who are at risk of failing will have access to all education programs at the school and services will be provided to them always in the least restrictive environment feasible.

The staff at HCLA-Wake will work with the state level staff on a continuous basis to ensure that state and federal mandates and expectations are carried out daily.

The staff will seek guidance from the NCDPI staff in this area annually or as required to ensure that the appropriate guidelines are being followed.

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Q135.Describe the extent to which one or more of the founding board members has experience working with special populations (students with disabilities, students with 504 Plans, ELs, students identified as gifted, and students at risk of dropping out). If no founding board members have experience working with special populations, describe the school's pre-opening plan to prepare for special populations.

Many of the members of the HCLA-Wake planning team and founding board have experience working with special populations as many are career and trained educators whose previous jobs have required them to become involved with special student populations as a teacher or as a school administrator. Some have worked in high performing schools and school districts while others have worked in very low performing schools and school districts. Members of the HCLA-Wake planning team and founding board have worked in the assessment of special population students, while others have led and participated in IEP identification, generation, and monitoring, Section 504 identification, generation, and monitoring as well as ELS identification and planning sessions, some have taught special needs students including at risk students, some have worked in setting up special needs student files, some have participated in special needs audits, while others have worked with gifted students providing oversight on rigorous curriculum programming and instructional delivery for gifted students.

The HCLA-Wake planning team and founding board members fully understand the mandates in place at the State and federal levels on providing services, instruction, and assessments as well as maintaining the confidential records of students in the special population categories and will ensure that all mandates are fully carried out according to those expectations. The school level staff will establish a relationship with state level staff in this area to ensure that school policies and planning for these students meet with state and federal expectations, guidelines, and regulations.

Q136.Explain how the instructional plan and curriculum will meet the needs of English Learners (EL), including the following:

- 1. Methods for identifying EL students (and avoiding misidentification).
- 2. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for EL students.
- 3. Plans for monitoring and evaluating the progress and success of EL students, including exiting students from EL services.



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4. Means for providing qualified staffing for EL students.



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The staff at HCLA-Wake will use the process established by the Federal Title II guidelines and NCDPI to identify English Language Learners (ELL) in the following ways:

- 1. The staff at HCLA-Wake will use the process established by the Federal Title II Guidelines and the NCDPI to identify ELL. The staff will follow the training and guidelines set forth by the NCDPI staff on which assessment and the steps the school needs to take to appropriately identify students who are ELL. Currently the WIDA Placement Test or the W-APT is the assessment used in North Carolina for initial identification and placement of kindergarten students believed to be ELLs, while the WIDA Screener is the assessment used in grades 1-12. The leadership at HCLA-Wake will ensure that a staff person is designated to take responsibility for contacting NCDPI and receiving the necessary training to be sure that the appropriate policies and procedures are followed to identify and place students identified as ELL. The assigned person on staff will contact NCDPI and ensure that they are included in all training and the receipt of all resources necessary to meet the needs of these The person will become a part of the training provided to ensure that the appropriate assessment is used, that the assessment is properly administered, and the appropriate timelines are followed. The NCDPI and federal guidelines will be followed for identification and to avoid any mis-identification. It shall be the responsibility of the principal to ensure that a person is designated for this responsibility and that the person has a cop of the NC ELL Identification and Placement Guidelines.
- 2. ELL Students at HCLA-Wake will be included in the regular classes with an allowance of support services using designated and approved accommodations for the students. ELL students at the school will have access to the comprehensive education program at the school and will be provided such in the least restrictive instructional environment Any designated need for accommodations is to be documented for instruction and for administering student assessments.
- 3. HCLA-Wake staff will follow the State Board of Education guidelines based on the federal Title II Guidelines to determine when the ELL students are eligible to exit the ELL program without any negative The ELL students' parents/guardians will be involved in the identification, monitoring, and termination decisions of all ELL students identified. The staff at HCLA-Wake will have high expectations for all students regardless of their need for special services. ELL students' access to services at HCLA-Wake will always be provided in the least restrictive instructional environment feasible.
- 4. HCLA-Wake will use federal funds and/or federal grants to generate revenue to support a part-time position, (possibly contracted) ELL position depending upon the number or identified ELL students enrolled at the The part-time position may be a shared position or set up to be an independent part-time position. The extent of funding and the number of hours designated to the position will determined by the number of ELL students identified at the school annually.

The HCLA-Wake leadership will seek professional development assistance from NCDPI for the designated ELL staff person as soon as the person is hired and designated to work in that capacity.



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According to the NCDPI website, their goal is to prepare educators with the knowledge and resources needed to meet the diverse needs of ELLs, including how to implement effective programs and curricula.

Q137.Explain how the school will identify and meet the needs of gifted students, including the following:

- 1. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.
- 2. Plans for monitoring and evaluating the progress and success of gifted students; and means for providing qualified staffing for gifted students.

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The staff at HCLA-Wake will seek guidance from the NCDPI staff in this area annually and as required to ensure that the most recent guidelines are being implemented and followed.

1. HCLA will meet the needs of Academically/Intellectually Gifted (AIG) student by first ensuring that they are appropriately identified. The staff will identify students for its AIG Program using the system devised by Joseph S.Renzulli, Director of the National Research Center on the Gifted and Talented, University of Connecticut--"A Practical System for Identifying Gifted and Talented Students". Renzulli's system for identifying gifted and talented students is based on a board range of research that has accumulated over the years on the characteristics of creative and productive individuals (Renzulli,1986). His research shows that highly productive people are characterized by three interlocking clusters of ability, these clusters being above average (though not superior) ability, task commitment, and creativity.

Renzulli's identification system suggests that personnel look for a talent pool of approximately 15 percent or higher ability students needing supplementary services, although it can be adjusted depending on the availability of resources. The teaching staff will have to

- modify the regular curriculum for above average ability students,
- participate in various kinds of enrichment and mentoring activities, and
- work cooperatively with other staff and special program assignments.

The Renzulli System has 6 steps:

- Step 1: Test Score Nominations Step 2: Teacher Nominations
- Step 3: Alternate Pathways (parent and peer nominationsk tests of creativity, self-nominations)
- Step 4: Special Nominations (Safety Valve No 1) (Special nominations represent the first of two "safety valves")
- Step 5: Notification and Orientation of Parents
- Step 6: Action Information Nomination (Safety Valve No. 2)

Renzulli cautions that Step 1 become minimized especially when considering primary age students, disadvantaged populations, or culturally different groups.

The staff will employ the steps in Renzulli's research and model for identification. The school will use test results from the NC Reading and Mathematics end of year tests results for step 1. Students who score at the 90 percentile or higher in reading and/or mathematics will become eligible for



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identification. Teachers will be taught how to differentiate instruction to ensure that AIG students are challenged daily. AIG identified students will be encouraged to serve as peer tutors and to take other leadership roles at the school. AIG performance on all assessments and their classroom performance will be closely monitored to ensure that their needs are met and that they are being challenged on a continual basis. Services through differentiation or flexible grouping in reading and mathematics will be a part of the AIG students' daily learning experiences. If a student is in grade 3 but reads at a grade 5 level, that student will be permitted to do some work in reading groups routinely at the higher grade. All staff at HCLA-Wake will be trained on this differentiated reading method and flexible grouping. In differentiated learning groups, the school gets to serve all kids by meeting them where they are. Teachers will be permitted to modify, extend, or compact the curriculum using this method.

(2) Once enrolled in AIG, students at HCLA-Wake will NOT have to be retested unless it is determined that additional services may be needed. The school will have an annual process in which staff will review the level of services and students' performance. The AIG team will meet routinely to discuss students' progress in the program and to report students' progress to students and their parents/guardians. A master teacher at the school will be designated as the AIG Coordinator with some extra allotment to serve in this capacity. "Maximizing Gifted Students' Potential in the 21st Century' by Brulles and Winebrenner will be used as a guide for services to AIG students at HCLA-Wake

The staff plans to work with the AIG Division of NCDPI to set up a plan to establish a state-recognized middle school AIG program to the extent that it is feasible to be offered at HCLA-Wake.

# 9.3. Exceptional Children

The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation *Individuals with Disabilities Education Improvement Act (IDEA), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities.* **All public schools are responsible for hiring licensed and 'highly qualified' special education** 



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**teachers pursuant to law.** Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.

Q138.**Identification and Records** Explain how you will identify students who are enrolled within the charter school that have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act.



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HCLA-Wake's board of governors and its planning team are fully aware of the expectations form state and federal officials that as a North Carolina public charter school, it cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Act (IDEA) and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities.

The staff will identify students with disabilities by accepting referrals for identification as a student with a disability based on a referral for 1) Section 504 which is a part of the Rehabilitation Act of 1973, a civil rights law that prohibit discrimination of students on the basis of a handicapping condition, or 2) an Exceptional Children's Program in which the Individuals with Disabilities Education Act (IDEA) has a defined list of disabilities. When a teacher, parent/guardian, or other involved person suspects that a child may be a child with a disability, he/she will provide in writing the reason for the referral, addressing the specific presenting concerns and the student's strength and perceived needs. The referral is to be given to the school principal, the child's teacher or other professional staff person at the school. The principal at HCLA-Wake will accept and review all written referrals for students with disabilities; and provide assistance to parents/guardians and others who make an oral referral that it must be in writing. The designated school staff will then conduct the initial evaluation in accordance with NC 1503-2.4 through NC 1503-2.7 which:

- must be conducted; eligibility determined and for an eligible child, the IEP (Individualized Education Program) developed, and placement completed within 90 days of receipt of a written referral; and must determine--
- if the child is a child with a disability under NC 1500-2.4; and b) determine the educational needs of the child with a d

HCLA-Wake is committed to providing students with disabilities (whether the scholar is identified under Section 504 or an IEP) an appropriate education in the least restrictive environment that will develop them mentally, physically, emotionally, and academically. Given that the current ratio of students with disabilities in Wake County is approximately 14 percent of the overall enrollment, it is expected that the ratio for HCLA-Wake will be similar (14 percent) if not greater than the overall Wake County ratio. It is expected that there will be a need for at least one but most likely two licensed and highly qualified special education teacher who will work full time with support staff to assist with working with the students with disabilities. One teacher will serve as the program lead while the other will be truly be a special education teacher. It may become necessary to hire several over time as we estimate that there should be one licensed special education teacher for every 30-35 students identified.



# **NC Public Charters**



The governing board and school leadership will be expected to use funds from the EC grants but will also use resources from state and federal funds to support a well-established system of support for students with disabilities who are enrolled at the school.

The staff of HCLA will seek guidance and and current guidelines regarding services to students with disabilities under Section 504 and IDEA once the governing board is is moving forward to open the school.

Q139.Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed. Include how the school will avoid misidentification of special education students.

#### NC Public Charters



HCLA-Wake will identify students who may be eligible for special education under the federal "Child Find" (NC 1501-2.8) mandate by accepting referrals in the admission process for students with disabilities who reside any place in Wake County. Students' admission will be based on the application process and the lottery, however, any student with a disability whose application because of their admission number warrants admission will be admitted regardless of their circumstances or the severity of their disability. Students will be admitted in grades K-8 in the following manner:

- (i) All students with disabilities ages 3-21 residing in Wake County including children who are homeless or are wards of the State regardless of the severity of the disability, and who need special education and related services, are identified, located, and evaluated.
- (ii) All children with disabilities ages 3-21 placed by their parents in a private school located in Wake County, regardless of the related services are identified, located, and evaluated; and
- (iii)A practical method will be developed and implemented by the staff to determine which children are currently receiving special education and related services. HCLA will also recognize that "Child Find" must also include:
- 1. Children who are suspected of being a child with a disability and in need of special education, even though they are advancing from grade to grade; and are
- 2. Highly mobile children, including migrant children. As the school staff recruits students from all over Wake County, using a variety of strategies, the chances of identifying student under "Child Find" and having them enroll at the school is greatly enhanced.

The staff at HCLA-Wake will seek guidance from the NCDPI Exceptional Children's Division on clarity and an update regarding "Child Find" once the governing board is planning to open the school.

Q140.Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed, including the following:

- 1. Requesting Records from previous schools
- 2. Record Confidentiality (on-site)
- 3. Record Compliance (on-site)

## **NC Public Charters**



HCLA-Wake's staff's plan for managing the records of students with disabilities who have IEPs and Section 504 accommodations is as follows:

- a. If a child with a disability transfer to HCLA-Wake from another school, no release is required to transfer educational records between the old school and HCLA, however, the student's record will be kept secure and confidential.
- b. In order to maintain the confidentiality of student records at HCLA, the following will be done:
- 1. Records will be stored in a secure locked location.
- 2. An access list will be posted on the storage cabinet indicating who, within the school, has permission to view the records.
- 3. An access signature sheet will be provided in the record for individuals who are not on the posted access list who may need to access students' records.
- 4. The access sheet must include the name of the person reviewing the record, the date of the review, and the purpose of the review.

The staff at HCLA-Wake will be informed of the process for accessing the records of student with disabilities. The special education lead teacher will assist the school's principal by overseeing this process for accessing student records to ensure that it is properly implemented and to ensure that student confidentiality is maintained at all times.

The designated special education teacher(s) for HCLA-Wake will be responsible for maintaining the confidential records for both students with IEPs and students identified under Section 504 of the Rehabilitation Act.

Q141.Exceptional Children's Programming Explain how you will meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible.

## **NC Public Charters**



HCLA-Wake proposes to meet the learning needs of students with mild, moderate, severe disabilities the same way it will for students not identified as students with disabilities by meeting scholars where they are and providing them with the coaching and support to help them realize and maximize their potential. It is expected that children with disabilities will be included in regular classrooms in the least restrictive environment feasible yet will develop them mentally, physically, emotionally, and academically. HCLA has the philosophy that all children can learn though not all at the same pace, with the same level of support or using the same strategies. This philosophy will definitely be applied when working with students with disabilities. All teachers at HCLA will be taught differentiated teaching and learning as a part of their instructional toolkit. It is expected that this instructional strategy will be used routinely when working with students with disabilities. The staff is expected to use a variety of strategies noted in the educational plan. While differentiated teaching and learning will have a great emphasis, strategies such as leadership training, blended learning which encourages the use of digital support tools under the Blended Learning rotational model, as well as "no excuse" principles which encourages students to do their best at all times.

The staff at HCLA-Wake will be trained to believe that all students can learn and that it is our responsibility to facilitate student learning to ensure that every child has the opportunity to realize their potential.

Q142.Describe the specific educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities. How will the school ensure students' access to the general education curriculum?

HCLA-Wake's staff is expected to employ whichever teaching methods and support strategies determined to be necessary to support students with disabilities in order for them to become as successful as is feasible. The staff will be expected to use a variety teaching strategies noted in the educational plan such as differentiated teaching and learning, Blended Learning Rotations, and strategies from AVID such as organization and structure building self-confidence to help students with disabilities become successful as learners.

Q143.Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).

## **NC Public Charters**



Students with disabilities, regardless of their disability or it severity, will be assured of a Free and Appropriate Public Education (FAPE) while attending HCLA-Wake. The staff will be encouraged to conduct research of all federal and State regulations, guidance, and resources to ensure that all students enrolled are able to receive a free and appropriate public education regardless of the needs of the students with disabilities.

# Q144.Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents, and relevant staff.

The expectation at HCLA-Wake is that the school leader (principal) will ensure that student's IEPs are monitored periodically and especially at the end of each academic quarter by the assigned special education teacher and her/his paraprofessionals to ensure that the scholars are meeting their IEP goals and to establish new ones, if necessary, and to determine students' needs at that time. Parents, teachers, relevant staff, and the students should be made aware of any and all student's progress as often as is feasible; but, officially, never less than quarterly.

# Q145.Describe the proposed plan for providing related services and to have qualified staffing adequate for the anticipated special needs population.

All related services needed by students with disabilities such as transportation, developmental, corrective, and supportive services in order to develop them mentally, physically, emotionally, academically, and vocationally will be made available to students enrolled at the school, on an as needed basis. The governing board and staff will pursue all available local, state, and federal guidance, regulations, and resources to ensure that the educational needs of students with disabilities at the school are met. Related services specifically relate to services such as but are not limited to:

speech-language pathology, and auditory services, interpreting services, psychological services, physical and occupational therapy, recreational therapy including therapeutic recreation, early identification and assessment of students with disabilities, counseling services, including services for diagnostic and evaluation purposes.

Related services may also be services in school as well as parent counseling and training. HCLA-Wake will take the steps necessary to ensure that the individual needs of students with disabilities who are enrolled at the schools are met regardless of the severity of their disability or the level of need identified.



# **NC Public Charters**



# 9.4. Student Performance Standards

# Q146.Describe the student performance standards for the school as a whole.

HCLA-Wake will have the following additional performance standards which may be adjusted once the first year enrollment is determined as the mission of the school is to meet students where they are and enhance and accelerate them from there on to where over time they are progressing every year in all academic areas.

- (1) The school will meet the overall state standard for growth by the end of 2025-26.
- (2) The school will meet the over state standard for growth each year after 2025-26.
- (3) The school will each year have an overall percent proficient in ELA that is equivalent to the State's effective 2025-26.
- (4) The school will each year have an overall percent proficient in mathematics that is equivalent to the State's effective 2025-26.
- (5) The school will meet the financial/budget goals of the school as stated in the annual budget resolution for the year 2025-26.
- (6) The school will meet the goal of 95 percent of teachers returning their Teacher Working Conditions Surveys for the year 2025-26.
- (7) The school will maintain a teacher certification percentage of at least 75 percent annually effective 2025-26.

Q147.Explain the use of any evaluation tool or assessment that the proposed charter school will use in addition to any state or federally mandated tests. Describe how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.



# **NC Public Charters**



The HCLA-Wake leadership team will work with its teachers on how to build their skills in constructing meaningful and effective on-going classroom assessments to monitor their scholar's performance on specific unit, goals, objectives, content, concepts. Teachers will be encouraged to use a variety of formats for teacher-created assessments to ensure that all scholars have access to the assessments. To make assessments more efficient and data-generation friendly, teachers will be encouraged to use online assessments, whenever feasible. Teachers will be trained on the generation and use of a pacing guide to help direct and pace instruction so that interim assessments of all types such as the state's North Carolina Check-In assessments and standards-based assessments are aligned with the teacher-directed instructional delivery each quarter.

The teacher training on the generation of assessments and the use of assessment data to inform instructional delivery will be conducted during their professional learning communities (PLCs) sessions so all teachers at a grade level who teach the same content will be trained on the process during the same session to encourage alignment from classroom to classrooms and to encourage the importance of working collaboratively to create meaningful and effective classroom assessments that are aligned to the instruction of all teachers teaching that specific content at that grade level This same format and process for developing or selecting in-house assessments will be followed regardless of the content area.

The planning team believes that on-going assessments that are meaningful and effective produce the most useful real-time data that teachers can use timely to redirect instruction and to ultimately to impact student learning. In addition, to keep the governing board and school administrators as well as the public and others informed regarding student performance, the school leaders will report at least quarterly a summary of all student test data.

Also, teachers will be encouraged to use unit and standards-based assessments that are components of the IXL purchased online program as those assessments are administered online and provide immediate feedback and reporting.

Q148.Explain the policies and standards for promoting students, including students with special needs, from one grade level to the next. Discuss how and when promotion criteria will be communicated to parents and students.



# **NC Public Charters**



HCLA-Wake will generate promotion standards and a promotion policy that will be evaluated and approved by the school's leaders and governing board. The policy will address how students are to perform at a grade level in order to be promoted to the next grade level including required student performance at grade 8 in order to be promoted and recommended for high school. The policy will also include a section on promoting students identified as students with a disability on a case by case basis which will address scholars' requirements related to their performance on meeting their IEP goals. Promotion criteria will be communicated to parents/guardians at the first meeting of parents (PTSO) of enrolled scholars at the school. Also, a copy of the board approved promotion policy will be provided to each parent/guardian at that time. A sample copy of a school's promotion policy is attached. A governing-board approved promotion policy will be generated prior to school opening in the fall of 2024 and will be included in the school's family handbook which will be available online on the school's website at the beginning of each academic year.

Per North Carolina General Statute 115C-288, the principal of the school, using all available student information, will make the final decision on grading and classifying students except as provided in

G.S. 115C-83.7 related to state-mandated student promotion standards at grade 3.

Policies and standards for promoting and retaining students will be among the first of the standards to be generated by the school's leadership and approved by the Board during the planning year. The promotion and retention policies will be consistent with any applicable state statutes and State Board of Education policies and regulations. These policies and standards will be reviewed annually by school leadership and the governing board to ensure that they remain consistent with state statutes and SBE policies.

# **Applicant Evidence:**



Sample HCLA\_Stude...

Uploaded on **4/17/2022** by **Mildred Bazemore** 

Q149.Provide the public charter school's exit standards for graduating **ALL** students. These standards should set forth what students in the **last grade served** will know and be able to do. Be sure to include plans for students at risk of dropping out.



# **NC Public Charters**

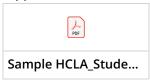


HCLA-Wake will use the state curriculum standards as guidelines for creating exit standards for scholars at grade 8. The graduation standard for grade 8 will required scholars to successfully complete their year-long grade 8 academic project, meet the school's attendance policy, have a passing grade of at least a "D" in either science or social studies, and pass at least 50 percent of their elective courses. Scholars in the last grade (grade 8) should be able to demonstrate proficiency (Achievement Level III or higher) on the State-mandated assessments in English/Language Arts, Mathematics, and Science. These standards apply to all students including students who are at risk of failing the grade. Scholars will be given options to compete their course requirements at grade 8 by attending a school-sponsored summer school academic program. Scholars graduating from grade 8 at HCLA will be awarded a certificate indicating that he/she has successfully completed the requirements of Heritage Collegiate Leadership Academy and is therefore eligible for enrollment in high school.

The grade 8 exit standards will be included in the promotion standards policy which will be approved and made available prior to the opening of the school in the fall of 2024.

Promotion and Retention policies for the school will be made available to students and parents/guardians prior to enrollment, will be available in the family handbook and will be posted on the school website along with any revisions changes to the policy should any occur. Exit Standards will be made available to grade 8 students at the time of their enrollment as a grade 8 students but will be available on the website once the school opens in August 2024.

# **Applicant Evidence:**



Uploaded on **4/17/2022** by **Mildred Bazemore** 

# 9.5. School Culture and Discipline

Q150.Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social



# **NC Public Charters**



development.



# **NC Public Charters**



At HCLA-Wake, we understand the critical role that school culture pays in the academic success of our scholars. We will be a trauma-informed school (sensitive to the impact of trauma on student learning) that uses the PBIS (Positive Behavior Intervention and Support) system. We will be a school-wide AVID school focusing on systems, organization, and structure at all levels to improve teacher teaching and to improve student learning. As a model that accepts no excuses for high expectations and high motivation for students, the staff will be trained to have these beliefs for all students including students with special needs. Every scholar will be expected to work towards realizing his/her potential at all times.

At HCLA we will focus on "growth mindset" which encourages scholars to believe in the power of one's self and one's own brain and that focusing on developing the right mindset early on is crucial for a successful happy life. According to reported research behind growth mindset, children learn putting forth effort and using the right strategies when they are trying to get something done, it can help them to get better at getting things done, they begin to feel an inner power, and will put forth a greater effort. When they come to know that their brain will enable them to learn more, to grow, they become more confident and resilient, will try harder and are less afraid to fail. HCLA will also use SMART goals to teach scholars how to set goals while at the same time will teach teachers also how to use the SMART Goals system to set goals for themselves as well as for scholars.

HCLA will schedule a Culture Camp for students the week prior to the opening of school at the beginning of each academic year and working on culture at the school will continue throughout the year to make culture/character/leadership development/mindfulness as integral parts of the school day throughout the academic year. In addition, HCLA will focus on culture in addition to academic activities during the Saturday Academies. Parents will become an integral part of this process An expectation of high Parent/guardian engagement at HCLA will afford us the opportunity to train parents/guardians on the culture of the school and its expectations. At HCLA, scholars will be trained on culture with the same level of intensity as the teachers/staff.

Other culture activities at the school will include Peer Mediation, Advocacy training, Social and Emotional learning, John Wooden Pyramid of Success, Life coaching techniques and strategies, Leadership through Alan Nelson's Kidlead and John Maxwell, as well as the 7 Habits of Highly Effective People by Stephen Covey. Global Education concepts will be included at the school along with an appreciation for diversity and diverse cultures. Scholars will be required to dress professionally on Professional Dress Fridays is an a part of the emphasis on culture.

At HCLA-Wake, the staff and scholars will talk a lot about Eagle Pride--described in the following manner:

# **NC Public Charters**



PRIDE represents the larger pride we have in our school as well as each individual letter included in the acronym. It also includes our overall demonstration of leadership, character, service, and scholarship. It is pride in our accomplishments, as we work hard to achieve our goals.

- Purpose is to have goals for each action and interaction throughout the year. Respect is treating others with politeness, consideration, and appreciation.
- Respect is treating others with kindness, politeness, consideration and appreciation.
- Integrity is being true to one's own values and doing the right thing especially when no one is looking.
- Determination is mustering the strength and will to do what you know you should do, even though you are afraid of embarrassment, failure, or danger.
- Excellence is striving for a high standard in your daily actions no matter how big or how small.

How do HCLA Scholars demonstrate Eagle Pride---

# **Purpose:**

SLANT (Sit up, Listen, Ask and answer questions, Nod your head, Track the speaker

Make each day a step toward a career or college

Participate in their classes and in the community

# Respect:

Treat everyone with kindness and courtesy

Honor Differences

Voice Concerns Appropriately

# Integrity:

Do the right thing because it's right, not out of fear of a consequence

Take ownership of one's own behavior

Be honest with themselves and others

### **Determination:**

Take Initiative



# **NC Public Charters**



Immerse themselves in new academic experiences

Stand up for what they know is right and challenge what they know is wrong

# **Excellence:**

Be a critical thinker

Put their character virtues in their own words and show them in their actions

Show pride in their work and in their school

# How Do Eagles SOAR even when the going get rough?

S--See it

O--Own it

A--Acknowledge it/Apologize

R--Recover

The basic ethics principle of Heritage Collegiate Leadership Academy is the Golden Rule-

"Do Unto Others As You Would Have Them Do Unto You".

Q151.Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for acculturating students who enter the school mid-year.



# **NC Public Charters**



For the first entering body of scholars, a Summer Culture Camp orientation session will be held during the week prior to the opening of school. Each scholar at the school will be provided with a "HCLA Student Planner" that contains information about the school and the school's culture. Rallies will be held at the beginning of assembly meetings, information will be on the website and teachers will be encouraged to teach and allude to the school beliefs, customs, and practice throughout the week especially during "morning meetings". Posters will be placed strategically along the walls in the hallways and in the classrooms and in special art rooms and computer rooms. Teachers will be provided information about the school's culture during "PLC", professional development sessions at the beginning of the year and throughout the academic year at their collaborative group meetings. Parents/guardians and incoming scholars who enter the school mid-year will get a full dose of information about the school's culture and ethos at the time of registration and enrollment. Once enrolled, the scholars will get refreshing information during all assemblies and other school gatherings throughout the academic year.

Q152.Provide a brief narrative that delineates how student conduct will be governed at the proposed charter school and how this plan aligns with the overall mission and proposed Education Plan of the charter school. Be sure to include:

- 1. Practices the school will use to promote effective discipline.
- 2. A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.
- 3. An explanation of how the school will take into account the rights of students with disabilities in regard to these actions that may or must lead to suspension and expulsion.
- 4. Policies and procedures disseminating due process rights, including grievance procedures, for when a student is suspended or expelled.



### NC Public Charters



At HCLA-Wake, the behavior of our scholars is a top priority. The school's discipline policy will support and reinforce the mission of the school. The scholars' commitment to the school's discipline policy will lead to a nurturing school environment that sets the stage for engagement and academic excellence and success. The staff is committed to upholding high expectations for students and for themselves as staff members. As such, they remain responsible for establishing a positive school culture that motivates scholars. The staff will model and identify appropriate conduct and behaviors in varying environments throughout the course of the school day and academic setting. Learning how to transition behavior in various settings remains as valuable component of the versatility required of scholars as they transition through life. The school will set high standards for scholars, families, and staff in order to educate enrollees as academic scholars. To ensure that scholars at the school will someday move on to become high school graduates, college graduates, and/or career professionals who are world leaders who make worthy contributions and whose decisions are made based on their moral beliefs and integrity, scholars at the school must learn self-control and discipline. They must remain focused in order to access the challenging rigorous curriculum and set high expectations set forth at the school. This can only be accomplished with the active participation of the entire community and staff affiliated with the school.

# 1. The practices the school will use to promote effective discipline:

In addition, staff and scholars at HCLA will be trained on a program that will be implemented on the sustained use of Positive Behavior Intervention and Support (PBIS). This technique will help staff and scholars to shift from a punishment-based system of "discipline" to one that actively teaches and promotes student engagement in desired behavior when making decisions related to student behavior. A description and summary of the PBIS Model is below:

- 1. **System Model:** The PBID efforts are focused on ensuring that HCLA has effective and efficient systems in place to respond to the behaviors of scholars. The PBIS team will set and promote school-wide behavioral expectations, organize the school's data systems to be more useful, examine the office discipline and referral system and will work to improve our classroom discipline support system.
- 2. **A Team Approach**: PBIS Teams are established to have representatives from teacher(s), administration, and support staff. The PBIS team works to assure the application of PBIS Principles. The team is a resource for all other staff within the school who are concerned about effective teaching and promoting the desired behaviors of scholars and how to effectively address scholar inappropriate behavior.



# **NC Public Charters**



- 3. Staff define with specifics each school-wide expectation for each school setting.
- 4. Staff actively teaches the expected appropriate social behaviors as they would teach academic
- 5. Staff promotes desired behaviors through the use of reinforcement.
- 6. The data-base approach: The PBIS Team uses data to gauge how well the scholars are doing, and to measure the impact of HCLA's discipline policies and strategies.

All HCLA teachers will play a vital role in the implementation of PBIS as a school-wide discipline strategy for all scholars at the school. The teachers' responsibilities are as follows:

- Pre-teaching expectations using the 'Leader in Me'-/PBIS Ma
- Helping students to internalize the Student Code of Conduct
- Explaining consequences to off-task behavior
- Modeling and teaching "Leader in Me" 7 habits lessons
- Providing a risk-free, consistent classroom environment, and
- Asking for assistance from the PBIS Team with the "frequent flyers".(b). While learning other disciplines, scholars will also be expected to learn the revised HCLA-Student Code of Conduct. The following delineates the HCLA Student Code of Conduct scholars are expected to follow at all times:
- (1) Scholars are to focus on their academic responsibilities during school hours;
- (2) Scholars are to be respectful and kind to each other, to the staff, to their families, and to the people in their community.
- (3) Scholars are to adhere to the dress code for scholars outlines in the HCLA Family/Student
- (4) Scholars are to attend class regularly and should always arrive on time.
- (5) Scholars are to accept responsibility for helping to maintain the school's physical environment and
- (6) Scholars are to follow the golden rule at all times, "Do unto others as you would have them do unto you".
- 2. A preliminary list and definitions offenses which many result in the suspension or explusion of students:
- (1) Scholar causes or attempt to cause or threatens to cause physical injury to another person on



# **NC Public Charters**



campus or at a school-sponsored event,

- (2) Scholar Possesses, sells or otherwise furnishes any firearm, knife, explosive, or other dangerous object,
- (3) Scholar Unlawfully possesses, uses, sells, or otherwise furnishes, or becomes under the influence of any controlled substance, alcoholic beverage, or an intoxicant of any kind while at school,
- (4) Scholar Unlawfully offers, arranges or negoiates, to sells any controlled substance or an intoxicant of any kind, and then delivers them either to sell, delivers or otherwise furnishes to any person on campus,
- (5) Scholar commits robbery or extortion,
- (6) Scholar causes or attempt to cause damage to school property or private property that belongs to others,
- (7) Scholar steals or attempts to steal school property, or the private property of others,
- (8) Scholar possesses or uses tobacco, vaping devices, or any product containing tobacco, hemp, marijuana, edible or chewable intoxicants, while at school,
- (9) Scholar commits an obscene act, or engage in habitual profanity or vulgarity,
- (10) Scholar unlawfully offers, arranges or negotiates to sell any drug paraphernalia,
- (11) Scholar disrupts classroom or school-sponsored activities,
- (12) Scholar knowingly receives stolen property, and
- (13) Scholar knowingly participates in gang activity.
- **c**. Scholars with disabilities may be suspended for inappropriate behavior while at school but school leaders can do so only by following State and federal regulations and guidelines. Guidance in this area will become a component of the school's discipline policy that will be approved by the school's governing board.
- **d**. Scholars who are suspended or reprimanded have the right to appeal the principal's decision to the executive director of the school and, if not satisfied, to the governing board, which makes the final decision. The school will have a board-approved grievance policy that will be approved by the

# **NC Public Charters**



governing board that will be posted on the school's website and included in the Family/Student Handbook.

A sample of the document being created for approval by the governing board is attached and contains a four categories of infractions and recommended consequences. This document will be re-evaluated by the new staff of HCLA-Wake for input and buyin before it is finalized and presented to the governing board.

The information contained within this application will be expanded during the planning year by HCLA staff and approved by the governing board in order to further clarify the discipline and PBIS model to be used at the school by staff and students.

# **Applicant Evidence:**



Uploaded on **4/17/2022** by **Mildred Bazemore** 

# 9.6. Certify

Q153. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- O No

# **Applicant Comments:**

No additional comments.

# Q154.Explanation (optional):

There is no further explanation required for this question.



**NC Public Charters** 





### **NC Public Charters**



# 10. Governance and Capacity

# **10.1. School Governing Body**

Q155.Organization Street Address (if you have one)

• On the Organization Information page, you already provided the mailing address.

Heritage Collegiate Leadership Academy- Wake County DBA HCLA -Wake

5601 Paul Road Raleigh, NC 27616-5319

# 10.2. Governance

The private nonprofit corporation or municipality is the legal entity that has responsibility for all aspects of the proposed charter school. Its members should reflect the ability to operate a charter school from both business and education perspectives.

Q156.Using the attached resource as a template, please complete the table depicting the initial members of the nonprofit organization.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 3

### Resources



Initial Members of t...



# **NC Public Charters**



# **Applicant Evidence:**



Uploaded on **4/21/2022** 

by Mildred Bazemore

Q157.Describe the governance structure of the proposed charter school, including the governing board's functions, primary duties, roles, and responsibilities as it relates to overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator.

# **NC Public Charters**



The governing board of Heritage Collegiate Leadership Academy-Wake will ensure that the school's compliance with all applicable local, state, and federal laws and regulations included ones related to finances. The following principles will guide board members;

- Duty of Care;
- · Duty of Loyalty; and
- Duty of Obedience.

The board's specific responsibilities will include, but not be limited to the following;

- 1. Defines, and refines the organization's mission, vision, and direction,
- 2. Recruits, supports, and evaluates the school's leaders,
- 3. Ensures effective organizational planning,
- 4. Ensures adequate resources,
- 5. Manages resources effectively,
- 6. Determines, monitors, and strengthens the organization's programs and services,
- 7. Enhances the organization's public standing,
- 8. Ensures legal and ethical integrity and maintains accountability,
- 9. Recruits and orients new board members, and
- 10. Assesses board performance.

In addition, the Board will provide leadership in the recruitment, hiring, supervision, and evaluation of the lead school administrator.

# **Applicant Comments:**

No other comments at this time.

Q158.Describe the size, current and desired composition, powers, and duties of the governing board.



# **NC Public Charters**



According to the bylaws for Heritage Collegiate Leadership Academy, the board will consist of a minimum of three (3) and a maximum of fifteen (15) board members. The original founding board consisted of nine (9) members. The governing board for Heritage Collegiate Leadership Academy-Wake County is expected to have at least five members with a maximum of no more than seven members. The current board members were selected either because of their ties to the community or because of their unique skills and careers. The board members with the education backgrounds will help to ensure that the school will be an educational and operational success. The board, as a group, will carry out the duties of a charter school board as listed above and evaluate the success of the school and school leader on at least an annual basis.

Q159.Describe the founding board's individual and collective qualifications for implementing the school design successfully, including capacity in such areas as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent/community engagement.

The founding board members for the Heritage Collegiate Leadership Academy in Wake County come from diverse backgrounds in business, sports, aviation, K-12 education teaching and administration, higher education including the community college and the state universities, law training, medical profession, professional Athelete, and community leadership. Their unique talents, careers, and qualifications will greatly assist in the successful implementation of the school design. Several of the HCLA-Wake Board members also have extensive experience in parent and community engagement in working with students parents and the community in providing and identifying the source for a a variety of services.

Q160.Explain how this governance structure and composition will help ensure that

- 1. The school will be an educational and operational success;
- 2. The board will evaluate the success of the school and school leader; and
- 3. There will be active and effective representation of key stakeholders, including parents.

# **NC Public Charters**



- 1. The composition of the current board of directors will include educators from the different levels K-12, community college, and university level.
- 2. The governing board will evaluate the success of the school and school leader using an evaluation rubric that will be developed by the board and reviewed by the school's leadership at the beginning of the school year,
- 3. The Heritage Collegiate Advisory Council will be comprised of key stakeholders from the community including parents. Their role will be to serve in an advisory capacity to the board and school leaders.

Q161.Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be recruited and added to the board?

The founding board members were recruited and selected based on the overall needs of the corporation in its planning to open a state-approved charter school. Each founding member was strategically selected based on the expertise that he/she was able to bring to the corporation's planning team at the planning stage of writing the application and setting up the structure for the charter school. Any vacancy occurring in the Board of Directors may be filled by the affirmative vote of a majority of the remaining board members. The board member so elected shall serve the unexpired term of the board member that he/she replaces. Currently the HCLA-Wake Planning Board of Directors consists of five members.

Q162.Describe the group's ties to and/or knowledge of the target community.







Several members of the current founding board and planning team are either long-term residents of the Northeast or Eastern Wake County communities or they are employed at schools or businesses or both in the targeted community and/or have experience in setting up a K-8 charter school. Most founding board members and planning team members currently live in either Northeastern or Eastern Wake County or the surrounding community. All members have lived or worked in the targeted community and understand its needs especially in meeting of the educational needs of the underserved student population in Northeastern and Eastern Wake County.

# Q163.Outline the strategic board calendar detailing how often the board will meet according to the bylaws established.

The governing board annual calendar will be set by the governing Board once it is known that the application has been approved. It is expected that the board will meet monthly on a specific day of the week at the same time for instance, the first Monday of each month from 6-8 p.m. Information will be provided to board members regarding the regular board meetings schedule and thhe meeting calendars will be established annually. The guidelines for setting up board meetings will be taken from "Board Meetings: A Guide for Charter Schools" by Marci Cornell-Feist." A copy of which will be made available to each governing board member.

Q164.What kinds of orientation or training will new board members receive, and what kinds of ongoing professional development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.

# **NC Public Charters**



Board Members for HCLA-Wake will be provided ongoing orientation and training throughout the planning process, including the planning year, The orientation and training sessions for the governing board will be scheduled as a component of the board calendar and will be provided throughout the calendar year at scheduled board meetings with some special call meetings depending upon the need.

For new Board members and once the board switches to the Governing Board, training will be provided at the point that the board begins its planning year. Guest lecturers will be commissioned to train board members once funds are available to do so. Until then, board members will be trained using the "Board Structure' booklet which provide -- A Guide to Bylaws, Officers, Committees, Responsibilities, and More for Exceptional Charter Schools and "Board Meetings" -- A Guide for Charter Schools by Marci Cornell-Feist. The content of these books will guide the specific topics to be addressed and requirement for participation; Training will include the following topics:

- 1. Scheduling, Board Calendar
- 2. Meetings, Agenda, Minutes, and Supporting Documents
- 3. Roles and Responsibilities
- 4. Laws and Procedures
- 5. Improving Discussion and Decision-Making
- 6. Financial Monitoring and Accountability
- 7. Managing Crises and Transitions
- 8. An Overview of NC Grant Makers and Philanthropic Organizations
- 9. Real and Perceived Conflicts of Interests

In addition, topics will be discussed at school board meetings based on input from members of the Board.

Q165.Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual



# 2022 NC CHARTER APPLICATION NC Public Charters



or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

Conflicts of Interest. The Chairman of the Board of Directors shall inform the Board of Directors of any direct or indirect conflict of interest which the Chairman of the Board of Directors has with regard to any transaction contemplated by the Board of Directors (a "Conflict of Interest"). A Conflict of Interest shall exist in Board actions including, but not be limited to, actions concerning a transaction:

(i) in which the Chairman of the Board of Directors has a material financial interest, or

(ii)in which the Chairman of the Board of Directors is presently serving as a director, trustee, officer, or general partner of another party.

Pursuant to the provisions of Section 55A-8-31 of the General Statutes of North Carolina, the Chairman of the Board of Directors may participate in the discussion but may not vote on the transaction and when the Chairman of the Board of Directors does not vote because of a Conflict of Interest, the act of the majority of the Board of Directors voting shall be the act of the Board of Directors if a quorum is present at the meeting.

At the beginning of each Board Meeting, A "Conflict of Interest" statement will be read by the Board Chair. Board members will be reminded at each Board meeting that if they have a conflict of interest regarding any item being discussed at the meeting, they are to acknowledge such and refrain from voting on that particular issue.

Q166.Explain the decision-making processes the board will use to develop school policies.

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Upon identifying the need for a new policy, the Board of Directors shall follow the following steps:

- 1) Board-level discussion;
- 2) Assign a team to draft a new policy;
- 3) Write a first policy draft;
- 4) Ask legal counsel to review draft policy;
- 5) Present draft policy to the board for approval;
- 6) Continue to review and revise board policies on an ongoing basis.

With regard to personnel policies, the board has the final authority. The board is the ultimate employer of the staff in the sense that it is the board that makes personnel policy and decisions. Personnel policy may be recommended by the charter school leadership and/or by the personnel committee, but only the board can make final decisions. The board gives final approval of wage and salary scales, fringe benefit programs/packages, vacation plans, and so forth. Finally, the board, usually acting through its personnel committee, may occasionally be called upon to function as a grievance committee with respect to an employee who has a dispute with the charter school administrator and who seeks relief from the higher authority of the Board of Directors.

Q167.Describe any advisory bodies, councils, or associations listed in the organization chart or to be formed, including the roles and duties of that body, and the reporting structure as it relates to the school's governing body and leadership.

There will be an HCLA Advisory Council for the school. The role of members of the HCLA Advisory Council shall be to advise the Board. These individuals have been selected for the expertise they bring in areas such as testing and accountability, college preparatory curriculum development, community outreach, fund raising, etc. Key stakeholders will serve on this council. Parents will also be selected to serve in this capacity. HCLA will also have a legally established Parent, Teacher, Student Organization (PTSO) that will be called upon to advise the Board and in some instances, the leadership of the school, on an as needed basis.

Q168.Discuss the school's grievance process for parents and staff members.



# 2022 NC CHARTER APPLICATION NC Public Charters



Below is the draft copy of Heritage Collegiate Leadership Academy-Wake Proposed GRIEVANCE POLICY:

A student, parent/guardian or employee may initiate the grievance process to appeal any final decision of school personnel within the school. A student, parent, or guardian wishing to initiate the grievance process shall make a written request for a conference with the principal to discuss the grievance to seek resolution. The request shall detail the basis for the grievance, name the specific policy, rule or law believed to have been violated, and specify the relief being sought. The grievance shall be filed within thirty (30) calendar days after the act or condition that provides the basis for the grievance. The principal shall grant the conference within five (5) school days following receipt of the request. The principal will state in writing his/her position on the issue to the student, parent/guardian or employee within five (5) school days following the conference.

If the grievance is not resolved at the principal's level, the student, parent/guardian or employee may appeal the principal's decision in writing to the executive director of the school. The appeal must be made within five (5) school days following receipt of the written response from the principal. The executive director shall review the grievance within five (5) school days following receipt of the appeal. If the executive director or his/her designee determines that additional time is needed to develop the factual record, the grievance may be put on hold for fifteen (15) additional days (or longer if by mutual agreement) to allow time for an investigation. A written response shall be made to the student, parent/guardian or employee, and principal from the executive director within ten (10) school days following the review.

If the grievance is not resolved at the level of the executive director, the student, parent/guardian or employee may appeal the executive director's decision in writing to the Board of Directors of the school by submitting the written appeal to the Chairman of the Board of Directors. The written appeal must be made within ten (10) school days following the student, parent/guardian or employee's response from the executive director of the school. The board shall offer a final written decision within ten (10) days. If the grievant fails to comply within the time periods or other procedures outlined in this policy, the grievant waives any further rights of appeal and the grievance will be considered resolved. The grievance may be voluntarily withdrawn by the grievant at any level or time. Once a grievance is withdrawn, it cannot be reopened. If at any time during the grievance process the school grants the grievant the relief requested, the grievance shall be terminated at that time.



# **NC Public Charters**



The principal shall disseminate the grievance policy to students, families and employees at the beginning of each school year. The above is the previous Heritage Collegiate Leadership Academy's Grievance Policy. This policy will be re-evaluated and re-presented to the governing board of HCLA-Wake before it becomes the official grievance policy of the Heritage Collegiate Leadership Academy-Wake County.

# Q169.Attach Appendix G Organizational Chart

• A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies, or parent/teacher councils).

☑ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

**Total Files Count: 5** 

# **Applicant Evidence:**



Q 167\_HCLA Organiz...

Uploaded on **4/15/2022** 

by Kashi Bazemore

# Q170.Attach Appendix H Charter School Board Member Information Form and Resume

- A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form
  - Upload Required File Type: pdf, excel, word Max File Size: 30 Total Files Count: 50

# **Applicant Comments:**

Files exceeded the file size limit. Additional board questionnaires are available upon request.



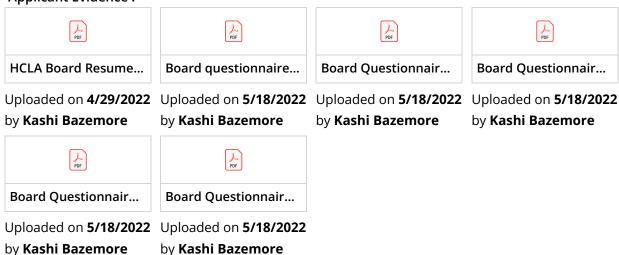
# **NC Public Charters**



### Resources



# **Applicant Evidence:**



# Q171.Attach Appendix I

- 1. Charter School Board Member Background Certification Statement and
- 2. Completed Background Check

# for Each Board Member

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

**Total Files Count: 50** 

# Resources

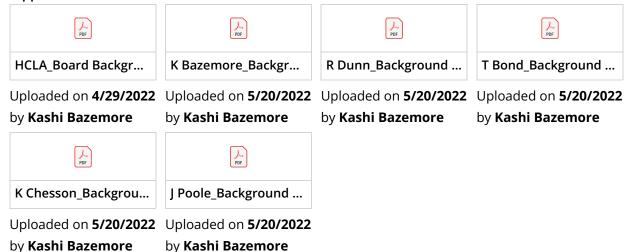




# **NC Public Charters**



# **Applicant Evidence:**



Q172.Attach Appendix J Proposed By-Laws of the Nonprofit Organization or Municipality The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law.

☑ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

**Total Files Count: 3** 

# **Applicant Evidence:**



Uploaded on **4/15/2022** 

by Kashi Bazemore

# Q173.Attach Appendix K Articles of Incorporation or Municipal Charter

- If the applicant is a non-profit board of directors, attach a copy of the articles of incorporation from the NC Department of the Secretary of State.
- If the applicant is a municipality, attach a copy of the municipal charter.
  - Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

**Total Files Count:** 5

# **NC Public Charters**



# **Applicant Comments:**

A copy of the NCLA Articles of Incorporation from the North Carolina Secretary of Stte Office for Heritage Collegiate Leadership Academy is attached.

# **Applicant Evidence:**



Uploaded on **4/18/2022** 

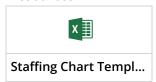
by Mildred Bazemore

# 10.3. Staffing Plans, Hiring, and Management

Q174.Projected Staff Complete the staffing chart below outlining your staffing projections. Adjust or add functions and titles as needed to reflect variations in school models. Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings, and align with the proposed budget.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 10

# Resources



# **Applicant Evidence:**



Uploaded on **4/22/2022** 

by Mildred Bazemore

Q175.**Staffing Plans, Hiring, and Management** Explain the board's strategy for recruiting and retaining high-performing teachers.



# **NC Public Charters**



Heritage Collegiate's governing board and its administrative leadership staff, together, will devise job descriptions for teachers at the school that reflect the school's mission and instructional focus. The job descriptions and advertisements will specify what teachers are expected to be - individuals who have at least a bachelor's degree in the area of certification and believe in the public charter concept. They must be progressive thinkers who are capable of functioning in a climate of "no-excuses," high expectations, and innovative ideas. The ads will specify that teachers at Heritage Collegiate must be committed to the mission of the school and willing to learn the instructional strategies to be employed at the school such as blended learning and differentiated teaching/learning models.

At HCLA-Wake, we will honor the NC Salary Schedule. We will also match the local teacher supplement provided by WCPSS. The goal is to hire highly qualified teachers who have some experience, who have at least a bachelor's degree, and North Carolina certification in the grade level and content they are expected to teach. Also, the school will look to hire teachers who are motivated to teach motivated students. The staff for Heritage Collegiate is projected to align with the projected enrollment, the school's mission, the educational plan and programming, and the projected budget for the school. The governing board will offer professional development for staff at the beginning of the school year and on an ongoing basis and will ensure that experienced and inexperienced teachers are supported daily. Instructional teams will be encouraged and developed across grades and within content to ensure a system of mentoring, coaching, and support among teachers employed at the school.

Q176.If already identified, describe the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Provide specific evidence that demonstrates the capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in. If no candidate has been identified, provide the job description or qualifications, and discuss the timeline, criteria, and recruiting/selection process for hiring the school leader.



### **NC Public Charters**



The principal/head for Heritage Collegiate Leadership Academy-Wake has not yet been identified. The school candidate for principal/lead will be an experienced highly-qualified individual whose belief in public charter education aligns with the school's mission and purpose. It is expected that the school leader will have a background in education administration, is familiar with or has worked in a charter school setting, is intelligent, personable, is a leader, manager, works well leading professional adults and is a innovative thinker who believes in digital learning as a major component of the school's teaching and learning process.

Q177.Attach in Appendix O the School Leader's Resume If the school leader has been identified, include the school leader's one-page resume in Appendix O.

# **Applicant Comments:**

The school leader is not yet identified. Once the school leader is identified, a complete resume will be filed with the NCDPI Office of Charter Schools.

# **Applicant Evidence:**



Uploaded on **4/18/2022** by **Mildred Bazemore** 

Q178.Provide a description of the relationship that will exist between the charter school employees and the school's board of directors.



# **NC Public Charters**



The relationship that will exist between Heritage Collegiate's employees and the non-profit board is that all employees will be employees of the board of directors even though only the Executive Director and the principal will actually be recruited and hired by the board. It will be the responsibility of the Executive Director and the principal to recruit and hire other staff members which are then approved by the governing board. They will develop and use a school team to interview prospective applicants for all positions after developing uniformed interview questions to be asked of all applicants for a specific position. The school's leadership will then conduct the criminal background checks, check the applicant's references, and make a recommendation to the governing board that will give the final approval for the hiring and rejection (if applicable) of the individuals. This employment practice applies to all employees of the school whether they are contracted staff, paraprofessional, or professional.

The governing board has to give final approval for the hiring and termination of empoyees even though HCLA-Wake will operate as an "At Will" employer.

Q179.Outline the board's procedures for hiring and dismissing school personnel, including conducting criminal background checks.



# **NC Public Charters**



The proposed governing board procedures for hiring and dismissing personnel, including conducting criminal background checks are as follows:

Before any hiring of school personnel, the school principal is responsible for creating job descriptions for each position. A list of proposed positions is presented to the board along with brief job descriptions and salary ranges for each position. From there, the school personnel positions will be posted in every location where potential applicants who are looking for positions may be searching. Positions will be posted at NCDPI, Employment Security Commission, NC Works, local newspapers, INDEED, Facebook, TWITTER, HCLA Website, Linked-in, and any other social media outlets feasible. The person at the school designated as the personnel lead will provide an application to each person who contacts the office requesting an application. In addition, a copy of the employment application for HCLA will be posted on the HCLA's Website. A timeline will be set as a deadline for each position.

Once the application deadline passes, the applications for a given position are collected and reviewed by an assigned personnel committee of staff members. The applications are then ranked by the personnel committee. Usually the top three candidates are called and scheduled for interviews. If any one of the three top candidates drops out for any reason, that applicant is replaced with the next ranked application. The personnel committee generates a list of about 12 questions to ask each of the applicants. All applicants will be asked the same questions unless an applicant's comments suggest the need for further probing. Once all of the three final candidates are interviewed, the committee meets to discuss the top three candidates for the position and are asked to ranked them based on their application, credentials, and responses to the interview questions. The candidate ranked as number one will be offered the position. If that person is no longer available or interested, the number two person is offered the position and so on. Once a candidate agrees to accept the position, a criminal background check is conducted, and if the report is acceptable, the director of the school submits the recommended candidate's name and credentials and along with a proposed salary to the governing board, who will typically go into closed session to approve, quesiton, or disapprove the hire. If the board approves the candidate, the candidate is hired by the school principal.

The school principal will submit the necessary information to ensure that every candidate recommended for a position complete the information necessary to conduct a criminal background check. The results from the criminal background check must be available for review at the time of the director's recommendation to the governing board.

For a dismissal, usually the request for dismissal comes from the principal with the necessary



# **NC Public Charters**



justification for the dismissal. Usually the principal will discuss the proposed dismissal with the Director before conducting the dismissal. If the employee is not satisfied with the dismissal and/or the justification for the dismissal, they have the right to appeal the matter to the director of the school. If the employee is dissatisfied with the director's decision, the employee may appeal to the governing board who will make the final decision regarding the employee's dismissal. In other words, the employee is expected to follow the school's grievance policy in response to a dismissal.

The governing board has to give final approval for the hiring and termination of empoyees even though HCLA-Wake will operate as an "At Will" employer.

# Q180.Outline the school's proposed salary range and employment benefits for all levels of employment.

Heritage Collegiate Leadership Academy-Wake will use the salaries specified in the most recent North Carolina state salary schedule as a guide to hire professional, support, and operational employees along with a supplement in order to be competitive with Wake County Schools' salaries. A system of benefits will be determined during the planning year to ensure that the school's benefits are competitive as well since the school will not be eligible for the State Retirement System or the State Health plan. HCLA-Wake plans to remain competitive with Wake County Public School district in its salaries, benefits, and working conditions for staff at all levels of employment including contracted staff.

The governing Board of HCLA-Wake will make the final decision related to employee hiring, termination, and anyi necessary disciplining of employees of the organization.

Q181.Provide the procedures for handling employee grievances and/or termination.



# **NC Public Charters**



Heritage Collegiate's proposed grievance policy for employees involves using open communication as the initial approach to settling any issue or dispute between any employees at any level. If that does not resolve the matter, then the employee should first seek to reduce his/her complaint with the principal at Heritage Collegiate through an informal discussion. If such a discussion does not resolve the matter informally, and the employee believes that his/her complaint should become a grievance, then the employee takes a written copy of his/her complaint to the Executive Director at Heritage Collegiate at which time a written complaint of the employee's grievance is discussed. If the matter cannot be resolved at this stage, then the employee may initiate a formal grievance given to the Executive Director which is referred by the Executive Director to the governing board to resolve the complaint. In cases of employee termination, the Executive Director makes a written report to the governing board requesting a termination decision by the board related to the specific employee with all information and documentation related to the incident/matter filed with the recommendation. The governing board at Heritage Collegiate has the final authority to resolve employee grievances and to terminate employees which is usually conducted during a close session of the board of director's meeting.

A copy of the organization's proposed grievance policy has been included in this charter school application for review and is attached below.

# **Applicant Evidence:**



HCLA\_Grievance Poli...

Uploaded on **4/18/2022** by **Mildred Bazemore** 

Q182.Identify any positions that will have dual responsibilities and the funding source for each position.



# **NC Public Charters**



In order to ensure that the school carries out effectively its mission and purpose, the planning team for HCLA-Wake does not plan to have positions with dual responsibilities. However, if the school does hire dual responsibilities employees, the school leadership will ensure that the financial records are well and appropriately documented if the employees' salaries are paid from multiple funding sources.

# Q183.Describe the plans to have qualified staffing adequate for the anticipated special needs population and means for providing qualified staffing for EL and gifted students.

Heritage Collegiate will hire a special education resource teacher for each group of 30-35 students. Once the number rises to 60, then a second special education teacher will be added. This is expected to occur in the second year of the school's operation even though the school's model for providing services to students with disabilities will be one of inclusion and in the least restrictive environment possible. A general education core teacher will be designated to serve as the ELL coordinator for the school. A small stipend of approximately \$400 annually will be recommended for those extra duties. A highly qualified master teacher will be given the duties of AIG coordinator with a small stipend of approximately \$400 annually provided to support the teacher in this role. The budget is projected for two special education teachers because the targeted populations and the targeted communities are known as high poverty and educationally low performing student populations. This population of students will be monitored closely to ensure during the registration process to ensure that the school hires sufficient staffing for the students as special needs students.

Q184.Provide a narrative detailing the roles and responsibilities, qualifications, and appropriate licenses that each position must have to be hired by the school's board of directors and effectively perform the job function(s).



# **NC Public Charters**



The professional positions at Heritage Collegiate will be expected to have at least bachelor's degree (with a master's desired) with experience in the area(s) in which they are expected to teach. They are expected to have a current North Carolina teaching certificate for the grades and the content area they are expected to teach. They must bring a skillsset of instructional delivery strategies that are consistent with meeting the needs of students. They must be willing to "think outside of the box," be open to innovative ideas, and believe in the public charter school concept. They must be able to teach effectively and assess students to check for their level of learning and understanding. The Executive Director, the principal, and the school counselor are expected to have at least a master's degree in an area of expertise even though the governing board of the school may choose to employ candidates with less credentials for the roles of Executive Director and school principal. These leadership positions must have the necessary training, experience, and skills in leadership as well as the skills and the ability to direct, motivate, and evaluate staff. The school's counselor must have at least a master's degree in counseling. The counselor must be able to work with students in all areas of character development, personal counseling, group counseling and other aspect of student's personal growth and development. The paraprofessional staff and the office clerical staff must all have at least a high school diploma with skills in word processing, writing, light bookkeeping, spreadsheet development and usage, and presentation skills using software such as Microsoft PowerPoint. In addition, they should know how to use all technology at the school including the office and classroom equipment. All staff members must be able to consistently perform effectively and efficiently in their respective positions and will be evaluated formally at least annually with observations and ongoing evaluations occurring as determined to be necessary by the leadership of the school. All positions expected to be employed at the school will be reflected in the school's projected school's annual budget approved by the governing board.

# 10.4. Staff Evaluations and Professional Development

Q185.Identify the positions responsible for maintaining teacher license requirements and professional development.

Heritage Collegiate Leadership Academy's teachers including special needs students' teachers and counselors will be required to maintain professional licenses and meet the professional development requirements specified by North Carolina and federal laws to ensure that they are highly qualified for their respective positions.

Q186.Provide a detailed plan noting how the school will mentor, retain and evaluate



# **NC Public Charters**



staff in a format that matches the school's mission and educational program. The plan should also describe how the school will meet the teacher certification and licensure requirements for teachers as prescribed by state and federal law. Be sure this overview matches with the projected staff and funding of the proposed budget section.



#### **NC Public Charters**



Heritage Collegiate plans to mentor, train, and evaluate teachers using a variety of strategies necessary to support teachers to enable them to be successful facilitators of learning for all of its students. Even the teacher evaluation process will involve noting areas where improvement is required and planning for professional intervention so that teachers are empowered to be effective teachers.

The school's plan for professional development begins as soon as an individual is interviewed for his/her position. In an effort to determine the potential strengths and areas where development is needed, potential staff will be asked about their skills, interests, qualifications during the interviewing process. The next phase of professional development will occur at the point at which staff is hired. When candidates are given approval for employment, they will be informed that they will be given copies of three books that they will be expected to read in preparation for employment at Heritage Collegiate: "Teach Like a Champion" by Doug Lemov, "A Practical System for Identifying Gifted and Talented Students" by Joseph S. Renzulli, and "Maximizing Gifted Students Potential in the 21st Century" by Diana Brulles and Susan Winebrenner. In addition, at the beginning of the school year, just prior to school opening, all staff members (including the clerical staff) will come together for at least three days to receive professional development in all areas of determined need in relation to the school's mission and expectations of staff which shall include to review and understand the following working in a "no excuse" instructional environment and a culture of high expectations for everyone including staff and students, the teaching and assessment of the State's Standards in ELA and in mathematics, language immersion experiences for students in Spanish and Mandarin Chinese; the Blended Learning Rotational Model; AVID College Preparatory Program; Differentiated Teaching and Learning; A discussion of the three assigned readings; Pyramid of Success character education Services Program by Coach John Wooden; KidLead by Dr. Alan Nelson on teaching students to become leaders; Socratic Seminars, integrating life coaching strategies student success; Latin as a component of ELA; Working with English language Learners, Section 504, and IDEA requirements for students with disabilities; Debate Across the Curriculum; Principles of Project-Based and Service-Based Learning; and integrating critical thinking strategies into strategies into instructional delivery. External experts in their respective fields will be brought in initially to direct the professional development and training in areas where no staff is skilled to lead. Paraprofessionals will also be expected to participate in the training. Heritage Collegiate plans to work in partnership/collaboration with local universities and community colleges to the extent feasible, to sponsor professional development opportunities for educators at the school and in the community, if feasible. Continuing Education units of credit will be provided to staff for their participation in the scheduled professional development activities. Heritage Collegiate will use the



# 2022 NC CHARTER APPLICATION NC Public Charters



North Carolina Educator's Evaluation System to evaluate its professional teachers.

The professional development scheduled initially for the school's staff and for subsequent sessions will always focus on the areas identified by the school's leadership and staff in order to develop the professional skills required by the school and its mission. In addition to the five days of professional development at the beginning of the school year, the school will sponsor at least three half days (early release days for students) of professional development for staff throughout the year. The annual budget will reflect the professional development activities scheudled for each academic year and will reflect the assessed needs of the staff as well as align with the mission and purpose of the school.

Q187.Describe the core components of the professional development plan and how these components will support the effective implementation of the educational program. Describe the extent to which professional development will be conducted internally or externally and will be individualized or uniform.

The core components of the profession development activities will be provided initially during the week beginning of the academic year. The professional development provided initially and in the ongoing sessions will focus on helping teachers and support staff to understand the educational programs and instructional strategies teachers are expected to employ i their toolkit in order to meet the needs of the students at the school. Professional development will be offered internally and externally and in partnership with the local educational institutions addressed in item two and in partnership/collaboration with other local schools, and with the state department of public instruction, if feasible. Professional development activities will always align with the goals, mission, education programing, budget projections, and school's expectations as well as the needs identified by staff as areas where development is required in order for them to be successful. The needs and focus of the staff's subsequent professional development activities will be determined by the school's instructional leadership team and the school's leadership to be approved by the school's governing board.

Q188.Provide a schedule and explanation of professional development that will take place prior to the school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly



#### **NC Public Charters**



# challenging aspects of the curriculum and instructional methods.

The schedule and focus of the professional development activities have been outlined in item 2; however, as stated professional development at Heritage Collegiate will be planned to address the needs of staff in order to meet the challenging aspect of the curricular programming and the innovative instructional delivery strategies proposed in the educational program. An instructional leadership team will be developed at the school to work with the school's leadership to ensure that the professional development needs of the staff are addressed throughout the academic year always beginning each year with the pre-school opening professional development activities.

Q189.Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan.



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The school's academic calendar will reflect the days devoted to professional development. Initially, it will begin with approximately five days at the beginning of the school year and at least 3 half days (early release days for students) as needed throughout the academic year. All professional development days will be noted on the school calendar. The days are reflected on the school calendar and the costs are reflected in the projected budget for the school. The daily schedule will have to accommodate professional development activities only on three designated days throughout the academic year. The staffing structure supports all teachers being involved in the professional development activities at the beginning of the school year and on the three early release days.

In addition, the school's plan for professional development begins as soon as an individual is interviewed for his/her position. In an effort to determine the potential strengths and areas where development is needed, potential staff will be asked about their skills, interests, qualifications during the interviewing process. The next phase of professional development will occur at the point at which staff is hired. When candidates are given approval for employment, they will be informed that they will be given copies of three books that they will be expected to read in preparation for employment at Heritage Collegiate: "Teach Like a Champion" by Doug Lemoy, "A Practical System for Identifying Gifted and Talented Students" by Joseph S. Renzulli, and Maximizing Gifted Students Potential in the 21st Century" by Diana Brulles and Susan Winebrenner. In addition, at the beginning of the school year, just prior to school to school opening, all staff members (including the clerical staff) will come together for at least three days to receive professional development in all areas of determined need in relation to the school's mission and expectation of staff which shall include to review and understand the following working in a "no excuse" instructional environment and a culture of high expectations for everyone including staff and students, the teaching and assessment of the State's Standards in ELA and in mathematics, language immersion experiences for students in Spanish and Mandarin Chinese; the Blended Learning Rotational Model; A discussion of the three assigned readings; Pyramid of Success character education Services Program by Coach John Wooden; Kidlead by Dr. Alan Nelson on teaching students to become leaders; Socratic Seminars, integrating life coaching strategies for student success; Latin as a component of ELA; Working with English language Learners, Section 504, and IDEA requirements for students with disabilities; Debate Across the Curriculum; Principles of Project-Based and Service-Based Learning; and integrating Critical thinking strategies into instructional delivery. External experts in their respective fields will be brought in initially to direct the professional development and training in areas where no staff is skilled to lead. Paraprofessionals will also be expected to participate in the training. Heritage Collegiate plans to work in partnership/collaboration with local universities and community



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colleges and to the extent feasible, other local schools, to sponsor professional development opportunities for educators at the school and in the community. Continuing Education units of credit will be provided to staff for their participation in the schedule professional development activities.

# 10.5. Marketing, Recruitment, and Enrollment

Reaching the full capacity for enrollment will be critical to obtaining the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions 115C-218.45 carefully.

Q190.Marketing Plan Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).



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The school's planning team Heritage Collegiate will market its program to all families and students within the general Northeast Wake County community and the surrounding areas to ensure that the school begins and remains filled to capacity. The efforts of the Marketing team will involve ensuring diversity of the staff and the students at Heritage Collegiate. Marketing strategies will include reaching out to the entire community to ensure that all ethnic groups with the general area are made aware that the school is in existence and available to serve all students in the Northeast Wake County and the surrounding communities. Every effort will be made to ensure that the staff and students at the school reflect the ethnic/racial demographic diversity of Wake County and especially the Northeastern and Eastern Wake County communities.

The planning team will market to the community using a variety of strategies such as placing public service announcements in local newspapers and with the local cable companies. Also, it will develop pamphlets and other literature about the school to disseminate at local churches, highly attended social functions and events in the community, local day care centers including the Wake County Preschool Program, and local chapters of prominent sororities and fraternities, and local organizations in the community such as the Chamber of Commerce and the Rotary Club. In addition, announcements will be placed in the local newspaper, on Heritage Collegiate's website and its social media networks including Facebook, Linked-in, and Twitter. In addition, Heritage Collegiate will sponsor "Open-House Events" periodically throughout the planning year in which members of the community will be invited to visit the school and learn about the school's programming academic focus. Heritage Collegiate's marketing plan will be devised to ensure that all students have equal opportunity for access to the school. In addition to all of the above-mentioned strategies, the planning team will also go door-to-door to inform families and parents of the existence of the school.

The school's planning team will form the marketing team whose responsibilities will be to further develop the school's plan for marketing to the community and to ensure its implementation to ensure that students are recruited and will enroll as scholars at the school in the fall of 2023.

Q191.Describe how parents and other members of the community will be informed about the school.



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The planning team will market to the parents, families, and members of the community using a variety of strategies such as placing public service announcements in local newspapers and with the local cable companies. Also, the planning team will develop pamphlets and other literature about the school to disseminate at local churches, highly attended social functions and events in the community, local day care centers including the Wake County Preschool Program, and local chapters of prominent sororities and fraternities, and local organizations in the community such as the Chamber of Commerce and the Rotary Club. In addition, announcements will be placed in the local newspaper, on Heritage Collegiate's website and its social media networks including Facebook, Linked-In, and Twitter. In addition, Heritage Collegiate will sponsor "Open-House Events" periodically throughout the planning year in which parents will be invited to visit the school and learn about the school's programming academic focus. Heritage Collegiate's marketing plan will be devised to ensure that all students have equal opportunity for access to the school. In addition to all of the above mentioned strategies, the planning team will also go door-to-door to inform the community, families, and parents about the existence of the school.

At Heritage Collegiate Leadership Academy, we will go beyond communicating with parents for informational purposes. We will engage our parents. Parents will be encouraged to attend Board Meetings. We will host Parent Academies during the last hour of each Saturday Academy for scholars. Parents will be encouraged to to get the criminal background check required to volunteer at the school. We want to meet with our parents face-to-face. We want them to see our school in action. Engagement requires intention. We will make parent engagement a priority. In addition, parents will always feel welcome to visit the school.

Q192.Describe your plan to recruit students during the planning year, including the strategies, activities, events, and responsible parties. Include a timeline and plan for student recruitment/engagement and enrollment, with benchmarks that will indicate and demonstrate suitable recruitment and enrollment practices over time.

Many of the school's marketing and recruitment team's efforts will be fully implemented during the planning year when the limited staff of HCLA-Wake will use every available recruitment strategy, set up information stations all around the community including the two North Raleigh Malls, give presentations to local churches, and every family event held in Northeast Wake County including neighborhood Flea markets. We will also visit local strip malls and any other place where families gather for recreation or to access information.



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Q193.Describe how students will be given an equal opportunity to attend the school. Specifically, describe any plans for outreach to: families in poverty, academically low-achieving students, students with disabilities, English learners, and other students atrisk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.

During the planning year HCLA-Wake staff will attend churches, go into low income housing developments and neighborhood activity centers low income housing developments and neighborhood activity centers low income housing communities and student hangouts in the North Wake County communities to ensure that the school's marketing and outreach reaches every family and every child that may be interested in attending the school.

Q194.What established community organizations would you target for marketing and recruitment?



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The marketing team at HCLA-Wake will target churches, hangouts, neighborhood churches, after-school programs, shopping malls, convenience stores, recreation centers, gyms, the local Boys and Girls Clubs, and just about any place in the Northeastern and Wake County communities that we feel we give all parents information that shares information about the school including how it will differ from traditional schools. Members of the planning team are also working to target community businesses for recruitment but also for working partnerships to work collaboratively to meet the needs of the children and the parents in the targeted communities.

In addition, the planning team for HCLA-Wake has made contact with members of several local graduate chapters of Greek organizations such as Omega Psi Phi, Alpha Kappa Alpha, Delta Sigma Theta, Zeta Phi Beta, Alpha Phi Alpha to work with the school by serving as mentors and sponsors, and community organizations such as TRIBOB to assist with marketing and recruitment. The rotary Club, TED TALKS, Capital Debate League, Tarheel Debate League, and Toastmasters International have agreed to offer support to the school and staff whenever feasible with professional development and support. Wake Tech North will offer support to the school with professional development by co-sponsoring staff development and providing CEUs and in some instances by providing a site for professional development for staff.

Once the application is approved, the planning team and planning board members will use all resources available in the community to recruit students focusing a lot on the organizations where community leaders and residents gather such as local churches, the YMCA, the Girls and Boys Club and a local community gathering center such as the "Dream Center" located in the heart of the 27616 community.

# 10.6. Parent and Community Involvement

Q195.Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.



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At Heritage Collegiate Leadership Academy, we will go beyond communicating with parents for informational purposes. We will engage our parents. Parents will be encouraged to attend Board Meetings. The staff will host Parent Academics during the last hour of each Saturday Academy for scholars. Parents will be encouraged to be do the background check required to volunteer at the school. We want to meet with our parents face-to-face. We want them to see our school in action. Engagement requires intention. We will make parent engagement a priority. Parents will be encouraged to have an active PTSO organization which the school will acknowledge and support and participate in as is feasible. Parents will be encouraged to visit the school throughout the year and will be treated with respect anytime they visit the school. Prior to the initial opening of the school, parents will be encouraged to visit the school and inquire about what it will offer and how it will differ from traditional schools in the community.

Q196.Describe how you will engage parents in the life of the public charter school. Explain the plan for building engaging partnerships between the family and school that strengthen support for student learning.



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The staff at Heritage Collegiate will communicate with parents extensively during the marketing, recruitment, and admission process regarding the school's expectation for parents to volunteer and engage themselves in their children's learning at every phase. The process of engaging potential parents has already begun but is expected to intensify once the school is approved and throughout the planning year and each subsequent academic year. Heritage Collegiate planning team and governing board believe that parents and the school are partners in directing student learning and school activities.

Parents, families, and community members will be encouraged to participate in all school events and school celebrations at Heritage Collegiate throughout the academic year including its open house celebrations. In fact, it will be expected that the school's leadership will work with and support the staff in encouraging parental engagement at the school by reaching out to parents/guardians and always making them feel welcomed regardless of their reason for being at the school. Parents and community members will be encouraged to volunteer their time and resources at the school through only after a criminal background check has been conducted. Parents will be expected to support the staff and students on community field trips and other activities sponsored by the school.

Additionally, parents/guardians are expected to attend parent/teacher academic conferences to discuss setting goals, developing PEPs for students and monitoring students' progress which will be scheduled at publicly announced intervals throughout the year. Parent/teacher conferences will be scheduled to accommodate the work schedules of parents, as needed. For students with disabilities such as students with an individualized Education Program (IEP) and students requiring Section 504 and English Language Learners (ELL) support, and students parents/guardians will be encouraged and expected to attend all meetings where student learning goals are being set and students' progress is being noted and documented towards those goals. Parents and guardians will be reminded frequently that they are partners in developing and creating support for the students' learning and successes.

Heritage Collegiate will have a website in which student information such as homework, special projects, scheduled activities and special events will be posted for the school in general. In addition, teachers will have specific website designations to support students in their efforts to learn and to be successful and to track classroom assignments, designated homework, and other activities.

Establishing and Maintaining strong and collaborative partnerships with the parents of the students at the school will be a priority relationship. Parents will be encouraged to participate in all aspects of the school and especially in establishing and overseeing the PTSO (Parents, Teachers, Student,



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Organization) partnership organization.

The planning team for HCLA-Wake believes that parents are a key partner in motivating and improving the learning of their children.

Q197.If already identified, describe any programs you will offer to parents and/or the community and how they may benefit students and support the school mission and vision.

HCLA-Wake will offer Parent Academies (many to be held on Saturdays to ensure parents can attend) to ensure that parents, families, communities, are informed throughout the year about the school's curriculum, its culture; teaching parents/families how to encourage their children to read by helping to learn some strategies to work with their children regardless of grade level. Parents will be encouraged to attend talent shows, art shows, student play and any other activities held at the school so that they will get to feel comfortable visiting the school. The school staff will be trained on feeling comfortable with parents visiting and engaging in activities at the school.

# 10.7. Admissions Policy

Q198.Weighted Lottery Does your school plan to use a weighted lottery? The State Board of Education may approve an applicant's request to utilize a special weighted, or otherwise limited, lottery in certain circumstances. If the charter applicant wishes to deviate in any way from the open lottery normally utilized by charter schools, the following requirements must be met:

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones, unless the charter school is operated by a municipality OR the charter school was converted from a traditional public school. Municipal charter schools may give enrollment priority to domiciliaries of the municipality in which the school is located (G.S. 115C-218.45(f)(7)), and charter schools that were converted from traditional public schools shall give admission preference to students who reside within the former attendance area of the school (G.S. 115C-218.45(c)).

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3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically, and legally sound practices, protocol, and research.

Yes

No

Q202.Provide the school's proposed policies and the procedures for admitting students to the proposed charter school, including:

- 1. Tentative dates for the open enrollment application period, enrollment deadlines and procedures. \*Please be advised schools cannot accept applications until after final approval from the SBE.
- 2. Clear policies and procedures detailing the open enrollment lottery plan, including policies regarding statutory permitted student enrollment preferences.
- 3. Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.
- 4. Explanation of the purpose of any pre-admission activities (if any) for students or parents.
- 5. Clear policies and procedures for student withdrawals and transfers.

A copy of the proposed admission policy for HCLA-Wake is attached.

- 1. HCLA-Wake will not accept enrollment applications until after the final approval from the State Board of Education.
- 2-5. A copy of the proposed admission policy for HCLA-Wake spelling out the admission procedures and practices is attached.

### **Applicant Comments:**

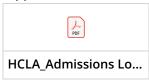
A draft copy of the proposed admission's policy for HCLA-Wake has been attached below. HCLA-Wake governing Board gives the final approval for the school's admission policy which will be created and approved prior to the opening of student enrollment at the school.



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# **Applicant Evidence:**



Uploaded on **4/18/2022** by **Mildred Bazemore** 

# 10.8. Certify

Q203. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- O No

# Q204.Explanation (optional):

No Additional Explanation required.



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# 11. Operations

# 11.1. Transportation Plan

Q205.Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. Include budgetary assumptions and the impact of transportation on the overall budget. The details of this plan should align with the mission, identified need for the charter school, targeted student population, and the budget proposal. If you plan to provide transportation, include the following:

- 1. Describe the plan for oversight of transportation options (e.g., whether the school will provide its own transportation, contract out for transportation, attempt to contract with a district, or a combination thereof) and who on the staff will provide this daily oversight.
- 2. Describe how the school will transport students with special transportation needs and how that will impact your budget.
- 3. Describe how the school will ensure compliance with state and federal laws and regulations related to transportation services



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- 1. Several members of the planning board and the HCLA planning team have experience and have had success establishing a 7-school bus plus one activity bus transportation system at a charter school. The team members have experience determining transportation needs, shopping for buses, purchasing buses, hiring and training drivers, insuring and plating buses, maintaining buses, establishing bus routes, establishing school rider policies, acquiring deisel fuel and other handling expenditures related to establishing an effective school bus transportation system.
- 2. HCLA-Wake will make provisions to provide transportation for scholars attending the school. The transportation system at the school will be operated by the school and headed by an lead operations coordinator who will also oversee some other operations at the school such as housekeeping and facility set up, maintenance, handling emergencies, maintaining sanitary conditions, and general operations.

As mentioned in the introduction, several members of the planning board and the planning team have worked previously on setting up a effective transportation system for a charter school that was rural in nature.

Initially, the school will set up a transportation system with possibly seven or eight full-sized school bus routes that will cover all areas of Northeastern and Eastern Wake County, after studying Northeastern and Eastern Wake County communities and traffic patterns. Additional short routes or special routes may be added depending upon the clustering of the enrollment for the school.

The first step will be to design bus routes, and then initiate a plan to purchase the required preowned buses.

From there, it is critical to ensure that the buses are insured as a component of the insurance policy for the school.

Scheduling for school buses will be managed by the school's lead operations coordinator and will follow the school's academic schedule in that no scholar would be picked up prior to 6:00 a.m. and each bus will be scheduled to arrive at the school no later than 7:50 a.m. as adcademic classes are scheduled to begin at 8:00 am. Buses will be expected to remain on site at the school during the day--except for fueling--while the school is in session and drivers will arrive in the evening no later than 3:00 p.m. to pretrip the buses prior to departing on their evening bus routes at 3:30 p.m. At the end of the evening bus trips, the buses are to be returned to the school parking lot and will be post-triped for overnight parking until the morning bus routes. Morning drivers will arrive in time to pre-trip their buses and to ensure that they are at their first stop no sooner than 6:00 a.m. School bus



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drivers at the school will be part-time contracted staff without benefits paid no less than \$15 an hour as that is the basic pay rate of bus drivers at Wake County Public School District. In addition to school buses, the school will purchase at least two activity buses for scholar field trips and excursions as well as two short buses for special needs scholars or for short bus routes. In addition, the school will purchase at least one heavy duty van for adult trips for off-site training such as professional development events. All vehicles assigned to HCLA will carry its name and logo on both sides of the buses or vehicles. HCLA school buses will have written North Carolina Public Schools above the school name on the buses. Buses designated as activity buses will be so noted.

Since most school buses operate using diesel fuel, the school leader with the approval of the governing board, with the assistance of the transportation lead person will contract with a local fuel distributor to ensure weekly or biweekly fuel delivery with the understanding that fuel prices fluctuate significantly from day to day. The school's leadership will contact the NC Department of Transportation regarding a recommended procedure.

In addition, the school will contract with an independent vehicle mechanic to cover maintenance and breakdowns. Typically, that contract will be for a specific amount each month regardless of the amount of service or lack of service provided. HCLA will assume all responsibility for parts such as tires, batteries, and other replacement parts required to keep buses and vehicles operational.

3. The transportation staff at HCLA-Wake will follow the guidance, rules and regulations set forth by the NCDPI Department of transportation, the NC Department of Motor Vehicles, and the NC Department of Transportation, on how to acquire buses as well as how to operate a school bus transportation system. It will also set up a system to hire and train drivers working with the NC Department of Motor Vehicles and the Transportation Division of the NC Department of Public Instruction.

The school buses, activity buses, and special buses will all operate in compliance with state laws and regulations of the State of North Carolina. Mileage will be tracked daily for each school bus and will be filed on site. School buses will be insured under the school insurance policy. It will be expected that bus drivers will be licensed and trained on operating buses at the HCLA-Wake charter School.

The school's leadership will be responsible for establishing school bus and transportation policies related to drivers and scholars' behavior while on the bus.

A. The school will transport scholars with special needs basically on the same school buses with other scholars except if special needs scholars need to be transported separately because of their

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handicapping condition(s), in which case(s) the school will make provisions to set up such transportation using the smaller buses on an as-needed Special needs scholars will be transported in the least restrictive environment feasible. Guidelines and regulations for transporting special needs scholars will guide our practice in this area. The school leader will work with the NCDPI Exceptional Children's staff on any available funding resource options available through their oice for any special needs transportation services required.

B. The transportation staff of HCLA-Wake will follow the guidelines, laws, rules and regulations set forth by the NCDPI Department of transportation, the NC Department of Motor Vehicles, and the North Carolina Department of Transportation as well as federal guidelines on how to acquire buses as well as how to operate an efficient and effective yet safe school bus transportation system.

C. In addition to providing school bus transportation, a system of carpool will be set up and supported at the school. Also, since August 2018, GOTriangle public transit launched the Youth GoPass program which allows youth between the ages of 13-18 to ride the GoTriangle, GoRaleigh, GoCary, and GoDurham buses at no cost. HCLA staff will worked with students and parents/guardians who are eligible for this service should the parents/guardians eligible for this service decide to use this option.

No child will be denied access to the school due to a lack of transportation as the school will work diligently to make provisions to ensure every scholar who wishes to enroll is able to do so.

The school's transportation plan and related budget policies, will be approved by the governing board before it is put forth for implementation to become operational.

The school's leadership will seek guidance from the its insurance provider, the NCDPI transportation department, the NC Department of Transportation and the NC Department of Motor Vehicles on finalizing the school's transportation plan on an ongoing basis and in the event of emergencies or other anormalies related to transporting students safely to and from school.

#### 11.2. School Lunch Plan

Q206.Describe in detail the school lunch plan that will ensure that no child is lacking a daily meal. The details of this plan should align with the targeted student population and school budget proposal. If the school intends to participate in the National School Lunch Program, include the following components in the response:



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- 1. How the school will comply with applicable local, state, and federal guidelines and regulations;
- 2. Any plans to meet the needs of low-income students; and
- 3. Include how the school intends to collect free- and reduced-price lunch information from qualified families. If a school intends to participate in the Community Eligibility Provision, describe the methodology the school will use to determine eligibility.



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The staff at HCLA-Wake will work closely with the NCDPI Child Nuutrition Department to establish a school-wide child nutrition program. The school will contract with an external vendor to provide food for the 600 maximum students on site. The NCDPI staff has trained several members of the HCLA team who previously were trained by NCDPI on the requirements for establishing a effective and efficient child nutrition program for HCLA. The program will be established to meet the economic and nutrititional needs of all students at the school regardess of their parent's income. The program will be established based on the State and federal guidelines related to nutrition and related to parental income.

- 1. Heritage Collegiate Leadership Academy's founding board has agreed that the school will participate in the National School Lunch Program for breakfast and for lunch. Because of the targeted student population in Northeastern and Eastern Wake County, it is expected that many of the scholars enrolled at the school will be eligible for free/reduced meals. At least one board member and at least one planning team member have been trained by the NCDPI Child Nutrition Program staff on setting up a child nutrition program at the school level. Both professionals have been trained and have experience setting up high quality child nutrition program on every level with ongoing oversight by the NCDPI Child Nutrition staff. The school's meal program will follow local, state, federal guidelines and regulations for operating a school meal program on the site. The NCDPI Child Nutrition staff will be contacted by the school's leadership as soon as the school is given approval to move forward. The staff will be scheduled to participate in updated child nutrition program guidelines, rules, regulations and expectations training.
- 2. It shall also be the responsibility of the school leader to contact the Wake County Health Department Inspector to make them aware that the school will be participating in purchasing, handling, and serving food to the scholars under the state's child nutrition program. It is understood that the health department inspector will visit the school's kitchen and inspect it in order to assign a food service grade. The school leaders will hire at least 2-3 part-time staff members to work in the kitchen to prepare the food and to transport it to the classrooms as all meals will be served in the classrooms, and to document the nutritional information as well as the data reflecting how many meals were prepared each day versus how many were consumed. Counts for the day's meal preparation will be taken daily at the beginning of the school day during the morning meetings. Scholars' homeroom teachers will be trained on the appropriate procedures for capturing which of the scholars will be eating the provided meals with the understanding that even though scholars may be eligible for free/reduced meals they can choose to opt out from eating the meals every day or whenever they choose to do so. It is expected that the teachers' will be able to capture the data using an electronic system such as PrimeroEdge on a tablet/IPAD/computer or some other program



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that allows the eligibility information to remain secure but provide for an accurate daily tally so that the school's leadership is able to file for federal/state reimbursements each month timely enough to meet the state deadline.

All scholars at HCLA-Wake, including economically disadvantaged students, will have the opportunity to participate in the school's child nutrition program and eligibility will be determined on whether the meals will be free, reduced, or full priced based on the information on the application completed by their parent/guardians at the time of the student's enrollment and at the beginning of the academic year and each year thereafter. The designated CN staff person will get the CN applications from the NCDPI Child Nutrition Department or use the appropriate process designated by the NCDPI Child Nutrition staff.

Because the school will be located in Wake County, it is questionable whether the school as a whole (schoolwide) will be eligible for participation in the Community Eligibility Program (CEP); however, the governing board will apply for the program through the NCDPI Office of Child Nutrition at the time the school board chair signs the NCDPI Child Nutrition Program Agreement for HCLA- Wake for the first school year (2024-25) and for each year thereafter. The planning team believes that participating in the CEP is an efficient and effective way to ensure every scholar has access to food daily but there may be additional costs associated with participation.

HCLA-Wake expects the governing board to contract with a reputable nationally known food vendor to disseminate meals (breakfasts and lunches) and milk based on an ordering system that makes the operation very cost effective. The state's procurement process will be used to identify a reputable vendor. In addition, it will be expected that the company will also provide, under a lease agreement, the necessary support equipment and appliances in order to store and prepare the meals (freezers, milk coolers, stove/ovens, refrigerators) sufficient enough to feed at least 600 scholars two meals a day for each of the 185 school days and for at least four Saturday Academies. A Request for Proposals will be issued to seek vendors to supply the food and the equipment. At least one planning team member has experienced in writing a child nutrition RFP, soliciting such vendors, evaluating proposals from perspective vendors, and recommending vendors to the NCDPI Child Nutrition Program staff and the school's governing board. Water and sanitizers will be made accessible to scholars during each meal served at the school. It shall be the responsibility of the governing board to approve the established school's child nutrition system as well as any contracts associated with its maintenance and upkeep throughout the academic year.

It shall be the responsibility of the school leader and the child nutrition lead staff person to be responsible for monitoring and implementing the school's child nutrition program, including its



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filing for reimbursement, its data collection, its monitoring, and other requirements such as responding to state and federal audits and requests for information. The school's leadership will recommend, and the governing board will approve an external auditor each year to review applications (if used) to ensure that scholars and family eligibility for each application is coded appropriately.

The process will require teachers to code each student's participation in the school meal program daily for breakfast and lunch either using a form previously created by HCLA staff and approved by the NCDPI Child Nutrition Staff or an electronc counting system designated by the NCDPI staff as has been done previously.

The HCLA-Wake staff will work with the NCDPI Child Nutrition staff as was done previously to set up a federal and state-approved child nutrition program at the school for all students enrolled at the school.

# 11.3. Civil Liability and Insurance

The Nonprofit shall name the SBE as an Additional Named Insured to their liability coverage for operation of a charter school while obtaining and maintaining insurance at a minimum in the following amounts:

- 1. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
- 2. General Liability: one million dollars (\$1,000,000) per occurrence;
- 3. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
- 4. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
- 5. Automobile Liability: one million dollars (\$1,000,000) per occurrence; and
- 6. Workers' Compensation: as specified by Chapter 97 of NC General Statute, Workers' Compensation Law



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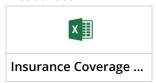
Q207.Complete the attached table, indicating the amount of each type of coverage as outlined in a quote obtained from an insurance provider.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 10

# **Applicant Comments:**

The insurance quote table has been completed and is attached. The insurance quote is from insurance people of North Carolina, located at 1920 Front Street, Durham, NC 27705 The telephone number is (919) 383-0442.

### Resources



### **Applicant Evidence:**



Uploaded on **4/18/2022** by **Mildred Bazemore** 

# **Q208.Attach Appendix L: Insurance Quotes**

• The applicant must provide a quote from an insurance provider as part of this application (as Appendix L) to demonstrate the levels of insurance coverage and projected cost.

✓ Upload Required File Type: pdf, image, excel, word, text Max File Size: 30
Total Files Count: 5

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# **Applicant Comments:**

The quote from the insurance provider is attached as Appendix L. The document provides the project levels of insurance coverage and the projected costs.



# **Applicant Evidence:**



HCLA Insurance Quo...

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# 11.4. Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

Q209.We, the Board members will develop a written safety plan and policies to be shared with staff, parents, and students and be available upon inspection from the Department of Public Instruction and local Health Departments. **The Board Chair must sign this question.** 

Signature



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# 11.5. Start-Up Plan

Q210.Provide a detailed start-up plan for the proposed school, specifying tasks, timelines, and responsible individuals (including compensation for those individuals, if applicable).

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The Start -Up plan for HCLA-Wake will include founding board members, planning team members, some hired staff if funds are available, and volunteers will take place during the planning academic year of 2023- 2024. The school will open officially effective with fiscal year beginning July 1, 2024 with the academic year beginning in August 2024. The list below delineates the activities, projects, purchases training and documents that must be generated during the planning year by the staff, the planning team, the planning volunteers, and members of the members of the founding board.

- 1. The appropriate team members will be selected some will be volunteers while other will be paid, if funds are available.
- 2. A group of team members will focus their efforts solely on marketing and student recruitment (recruiters).
- 3. The insurance quote should be confirmed by Director with the designated insurance agency and Board signs contract for insurance coverage.
- 4. The school board chair signs the charter agreement with NCDPI Office of Charter Schools.
- 5. Evidence of Board Meetings are to be scheduled, agendas created, and minutes generated. (Office Manager and School Leadership)
- Board policies are to be generated and approved by the governing board,
- Several Board members are to be added to diversify the board, and
- List of all Governing Board Members is to be submitted to the Office of Charter Schools,
- 6. The appropriate facility is identified and a contract to lease is signed. (School Leadership and the Governing Board)
- Building inspected and renovated to be outfitted as a school,
- Facility contingency plan put in the place,
- Register in SAMS reinstate DUNS Number,
- Generate a Board-Approved Budget Resolution for 2024-2025,
- Reactivate 501c3,
- Identify source of employee benefits and with whom,
- Set up board-approved procedure for conducting criminal background checks,
- Contract with CPA for Auditing, and
- Admissions policy finalized by school leadership and approved by the governing board
- 7. Student Accountability Planning by school leadership

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- ID accountability staff person,
- Student enrollment policies,
- Set up Secure Testing Closet,
- Get a Fax Machine and make sure it is operational, and
- Ensure that testing staff is appropriately identified and trained
- 8. Staffing to be conducted by school leadership
- Employee Hiring policies are developed and adopted by the governing board,
- Employment agreements are approved by the governing board,
- The school leader and at least 75 percent of staff hired for the upcoming school year,
- Hire licensed Special Education lead teacher and regular EC teacher, and
- Strategic plan in place to hire remaining staff needed.
- 9. Federal Programs (Federal Programs Consultants)
- Board policies in place and plan developed for professional development-contact NCDPI for assistance,
- Reach out to regional or NCDPI consultants, and
- Contact Wake-Tech North for agreement regarding professional development projects and CEUs
- 10. Instructional Program (Principal, Executive Director)
- Professional Development Plan,
- Curriculum Scope and Sequence for the first year put into place,
- School calendar synchronized with Wake County traditional calendar and approved by the governing board,
- Instructional materials purchased, and
- Classrooms set up and suitable for teacher/scholar arrival,



- 11. Transportation (school leaders including the Operations Manager)
- Reach out to locals regarding traffic patterns,
- Official transportation Plan developed and approved by the board,
- Disseminate the transportation plan seek feedback,
- Discuss transportation needs with parents-modify accordingly,
- Secure safe buses as modern as funds will purchase,



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- If applicable, Set up system for diesel fuel,
- Set up bus routes, and
- Set up transportation policies.
- 12. School Lunch/breakfast Service Plan Generated and Adopted by the Governing Board (School Leadership and Federal Consultant)
- Contact Regional NCDPI Child Nutrition Consultant to initiate the Child Nutrition Program
- Write RFP for Food Vendor,
- Evaluate RFPs, and
- Ensure contracted vendors meet local codes and is certified with NCDPI Child Nutrition Program
- 13. School safety policies generated aligned with Statute and approved by the governing board,
- 14. School policy manuals generated by staff and approved by the governing board,
- 15. Instructional programming framework developed by staff and approved by school leaders and the governing board,
- 16. Family/Student Handbook generated by staff and approved by the governing board, and
- 17. Employee Handbook generated by staff and approved by the governing board.
- 18. Get Facility and the "Certificate of Occupancy"--School Leader, Board Chair --sign off by NCDPI

Q211.Describe what the board anticipates will be the challenges of starting a new school and how it expects to address these challenges. Submit a Start-up (Year 0) Budget as Appendix O, if applicable.



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The greatest challenge for HCLA-Wake is the idea of starting a new previously unknown school in Wake County and acquiring the respect in the community to the level of providing competition and challenge to a school district with a stellar reputation like that of Wake County Schools. However, the planning team, the board members and our numerous supporters from the Northeastern and Eastern Wake County communities have seen the performance data from many of the traditional schools in these communities and agree that it is time and that the need is great so the challenge must be undertaken. We all feel that we are up to the challenge if the change will bring more educational options, higher expectations, and more rigorous curriculum offerings to the families and children of the targeted communities. Many of the participants and visionaries on this team have lived in these communities located in Northeastern and Eastern Wake County for many years and have seen and noted the many changes especially the limitations in the area of traditional and magnet school assignments in these communities. We believe that by employing the numerous marketing strategies such as sharing data on the performance of traditional schools in the communities, passing out flyers, speaking at community churches, information dissemination at the Triangle Town Center Mall, flyers at restaurants in the communities, and just being very visible as recruiters in the community during the planning year will assist us in achieving our recruitment goals. We also plan to hand out flyers at physicians' offices in the communities, day care centers, and small businesses located in the targeted communities. We have already received verbal endorsements from several small businesses in the communities and plan to get many more as we move about the communities.

We are very passionate about our commitment to offer K-8 innovative educational options to the families of these communities and plan to address the expected challenges with information about the value of our school's offerings and innovative programming while at the same time noting the limitations of the student assignment process currently in place for Northeastern and Eastern Wake County students especially for those students who are categorized as economically challenged and under motivated.

# 11.6. Facility



#### **NC Public Charters**



Note that the SBE may approve a charter school prior to the school's obtaining a facility; however, students may not attend school and no funds will be allocated until the school has obtained a valid Certificate of Occupancy for Educational use to the Office of Charter Schools.

Q212.What is your plan to obtain a building? Identify specific steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. Present a timeline with reasonable assumptions for facility selection, requisition, state fire marshal and health inspections, and occupation.



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The founding board and the planning team have been working together to get a sense of the available facilities in Northeastern Wake County. We have located several buildings in the targeted area that have been unoccupied since 2019. There is one in particular that the team believes will serve appropriately as the home and facility for Heritage Collegiate Leadership Academy-Wake. Information about that facility is attached.

The planning team for the school including board members have been seeking suitable locations that appear to be a safe, suitable, and secure locations that could be occupied immediately as a school or could be redesigned to be used as a school to house a maximum of 600 students and and up to approximately 75+ fulltime and parttime staff members. Our design drawing shows that we need to have a facility with at least 33 classrooms, several restrooms, sufficient office spaces, and a large open area suitable to be used for Assembly, Physical Education, and Music Education.

As soon as the charter application is approved, the plan is to identify the most suitable facility, considering all specifications, that is located in Northeastern Wake County. It is expected that the governing board will seek initially to lease a facility that meets our specifications and is large enough to accommodate the projected 600 students and the expected staff. It is expected that the facility will be renovated and outfitted to be made suitable for use as a school and be ready with a Certificate of Occupancy as a school by summer 2024.

Serious negotiations for a facility will begin next year and move into an expeditious phase during the planning year which begins in 2024-25 The team has a copy of the Public Schools of North Carolina Facility Guidelines revised 2014 from NCDPI and plans to use the guidelines to guide them through facility selection, facility requisition, setting up the required inspections, and in obtaining the Certificate of Occupancy.

The ideal facility will be located in zipcode 27616 and will contain at least 54,000 square feet and will be already compartmentalized to allow for easy conversions to classrooms, offices, meeting rooms, and a loading dock and allows for traffic patterns that will facilitate school bus traffic and a carpool for morning and afternoon. We are unable to seriously commit to a facility lease until we know that the application is approved and we have a definitely date for when funds will be alotted. Currently we have at least 6 facilities from which to choose.



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# **Applicant Evidence:**



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Q213.Describe the school's facility needs based on the educational program and projected enrollment, including: number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities. Discuss both short-term and long-term facility plans. Demonstrate that the estimate included in your budget is reasonable.

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The founding board and the planning team are seeking a facility with between 50,000 and 60,000 square feet preferably a brick structure with at least one loading dock that is located in an area that has police protection, has pavement around the building and has adequate space for parking. In addition, we expect the building to be located where the traffic flow and patterns can work daily with approximately 7-9 school buses moving about at least twice daily. We would like for the facility to be located in the 27616 zip code, if feasible.

The planning team for the school including board members has been seeking suitable locations that appear to be safe, suitable, and secure locations that could become redesigned to be used as a school to house a maximum of 600 students and approximately 70+ fulltime and parttime staff members. Our design drawing shows that we need to have a facility with at least 33 classrooms, several restrooms, sufficient office spaces, and a large open area suitable to be used for Assembly, Physical Education, Art Education, and Music Education. It is expected that the means of acquisition is through leasing with an agreement with the owner to reconstruct and outfit the facility so that it can be used as a school. A real expectation is that for the first five years, the school will be housed in the same facility. The founding board members and the planning team understand that no students will be allowed to enter the facility until a Certificate of Occupancy as a school is provided by the county building inspector.

A photo depicting the facility HCLA-Wake's planning team including the planning board is uploaded for reference as the facility that the team is interested in leasing for the fall 2024 opening. The facility was last used as a training facility and is current set up so that it can be easily converted to become a school facility and is located in the 27616 ZIP Code area.

# **Applicant Evidence:**



Exhibit A100 Overall ...

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Q214.Describe school facility needs, including: science labs, art room, computer labs, library/media center, performance/dance room, gymnasium and athletic facilities, auditorium, main office and satellite offices, workroom/copy room, supplies/storage, teacher workrooms, and other spaces.



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Because HCLA-Wake will offer a complete K-8 curriculum, it will have a need for gym space, assembly space, science labs, art rooms, computer labs, library/media center, performance dance area, auditorium, a main and satellite offices, conference rooms, supplies/storage, teacher work area, and a nurse's station. Access to water is a critical requirement from the NC Federal School Nutrition Program.

#### **Applicant Evidence:**



Exhibit A100 Overall ...

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Q215.What is the breakdown of cost per square foot for the proposed facility? Outline how this cost is comparable to the commercial and educational spaces for the proposed school location.

For the buildings that we have sought so far, the average cost, without renovation, is approximately \$3.50 per square foot. We have communicated with several local realtors who indicated that that is the average for the area which is located in upper Northeastern Wake County community.

Q216.Facility Contingency Plan: Describe the method of finding a facility if the one the board has identified will not be ready by the time the public charter school will be opening. Include information regarding the immediate spatial needs of the school and identify any programs that will not be immediately offered because a permanent facility has yet to open.

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As stated in previous entries in this section, there are many unoccupied building in Northeast Raleigh and Northeastern Wake County. We noted at least 10 similar facilities. Most have between 25,000 to 60,000 square feet. Many of the structures have been unoccupied for a long time left vacant since 2000s at which time they were abandoned by furniture stores, warehouses, and storage facilities. We feel that we will have no problem finding a suitable facility initially during the planning period, and if needed, as a contingency plan at any time in the next few years. We anticipate that a facility can be acquired once we know the application has been approved and there is an established financial plan in place for HCLA-Wake.

# Q217.Describe the board's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

As stated in previous entries in this section, there are many unoccupied building in Northeast Raleigh and Northeastern Wake County. We noted at least 10 similar facilities. Most have between 25,000 to 60,000 square feet. Many of the structures have been unoccupied for a long time left vacant since early 2000s at which time they were abandoned by furniture stores, warehouses, storage facilities, private training organizations, and private universities. We feel that we will have no problem finding a suitable facility initially during the planning period, and if needed, as a contingency plan at any time in the next few years.

Several members of the planning team have experience in the identification, the acquistion, and management of a facility including build-out and renovations that may be required in order to ensure an appropriate facility is selected as the home for HCLA-Wake County. In addition, at least one member of the planning team is a NC Licensed Real Estate Broker.

# 11.7. Certify

Q218.I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- O No



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### **Applicant Comments:**

No additional comments

### Q219.Explanation (optional):

No additional comments

### **NC Public Charters**



### 12. Financial Plan

### 12.1. Charter School Budget

All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate additional questions by those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.

# Q220.**If applicable, attach Appendix M: Revenue Assurances.** Assurances are needed to confirm the commitment of any additional sources of revenue.

At this time, there are no additional sources of revenues so there is no upload for this section. However, the school does expect to be eligible for federal funds under Title I and reimbursement under the federal Child Nutrition Program. The school plans to apply for federal grants and other sources of revenue during the planning year and each year thereafter.

# Q221.Attach Appendix N: Proposed Budget for Year 1 through Year 5 Click here to access and download the Budget Template. (https://www.dpi.nc.gov/charter-application-budget-template-2021-22xlsx/download?attachment)

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30

**Total Files Count: 5** 

### **Applicant Comments:**

The budget documents are attached for academic years one through five. All documents have been completed and have been uploaded. Although the planning team, including the board of directors, plan to pursue grants and other sources of revenue during the planning year, no additional funding is in place at this time.



### 2022 NC CHARTER APPLICATION NC Public Charters



### **Applicant Evidence:**



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### 12.2. Budget Narrative

Please include additional information that explains the assumptions used in the 5-year budget.

### Q222. How was the student enrollment number projected?

The enrollment for HCLA-Wake is projected based on a cap of 600 students as the total enrollment for the school. Because we believe that students in kindergarten and middle school will be our greatest number of recruits, the largest projected enrollment numbers are listed at grade K, 6, 7, and 8. The student enrollment number is projected based on a perceived need as expressed by parents and members of the communities. In addition, it is felt by the planning team that the school should begin with a smaller number of students with a focus on the elementary grades and at least one middle grade of grade 6. It is felt that beginning with a smaller group the first year and then transitioning to include grade 7 the second year, and then grade 8 the third year allows time for initial set up with a smaller group before transitioning to the full group by year 3.

We expect to have no more that 25 students per classroom with most classrooms being set up with fewer than 25 students. We believe that this model of opening the school is more sustainable. The school will open in 2024-25 with 440 students in grades K-6. The second year will add grade 7 and 80 more students. By the third year, we will reach full enrollment by adding grade 8 and another 80 students. By the third year, we will reach the full enrollment of 600 students.

Q223. Provide an explanation as to why you believe there is a demand for the school that

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### will meet this enrollment projection.

HCLA-Wake will be located in Northeastern Wake County where students who are economically disadvantaged are not permitted to attend a magnet school unless that live in the designated community and can attend as a base student. Transfers in Wake County outside of the residential community are limited and rare to achieve for these students. In fact, the only known cases have had to be appealed to the Wake County School Board in order to be considered and even then families/students are often refused the requested transfer. This is one of the issues in Northeastern Wake County that has caused many parents to become frustrated especially those who believe in community schools and access to school choice. Many parents have indicated that when they applied to the few charter schools in the area, they were told there are no openings and that most have waiting lists.

Please note the uploaded list of Wake County Public Schools located in the upper Northeastern and Eastern Wake County Communities that show their school performance grade as F or D according to what is reported in the NC Public Schools Report Cards for the 2018-19 academic year. This is very concerning to the many parents who live and send their children to school in these communities. The parents have indicated that they want more educational options available to them and their children in these communities. We believe that HCLA-Wake can provide one of those options.

Parents and community members in the Northeastern and Eastern sections of Wake County have suggested that a school that is small, caring, personable, and focused while at the same time providing engaging, rigorous, high quality instruction and has high expectations for its students will motivate students from these economically disadvantaged communities to become more active participants in the teaching and learning process. We believe that we are that school.

.

### Applicant Evidence:



Wake County DF Sch...

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### Q224.Provide the break-even point of student enrollment.

The break-even points of student enrollments for HCLA-Wake are as follows:

2024-25	425 of expected 440 students
2025-26	448 of expected 520 students
2026-27	491 of expected 600 students
2027-28	495 of expected 600 students
2028-29	498 of expected 600 students

Q225.Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.



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HCLA-Wake contingency plan to meet the financial needs of the school is to conduct numerous fundraising events including applying for grants and to seek foundations and private donors to assist the school to remain solvent until it is able to reach its projected student enrollment count. After hearing from existing charter schools in NC to expect low enrollments the first two years, the planning team and governing board members are anticipating that this will be one of their greatest challenges, especially for the first two years. In addition, the leadership will re-evaluate its staffing projections and projected operational expenditures to ensure that all expenditures are consistent with the needs of the school based on its actual registration and enrollment. Only about 75 percent of teachers will be hired early on while the remaining teachers will be hired closer to the actual opening of the school.

Whenever the projected school's student enrollment is determined and the leadership determines that enrollment may be falling short, every aspect of the school's operation will be re-evaluated in order to determine where it will be necessary to reduce costs and make cuts in order to have the least impact to the projected school's operations. This practice will be in place throughout the school's operation over the years as "Staying in the black" will be a consistent goal of the school's leadership and the governing board.

The school's annual actual budget will be based on the number of students enrolled for that year. The school will operate as an at-will employer and will maintain the flexibility to adjust its operational expenses any time there is an adjustment in its revenue for any reason. Its fiscal goal always is to operate within its means.

The staffing of HCLA as is reflected in the budget shows a maximum capacity. However, the planning team including the planning board member's contingency plan is to operate within its means and within the "black" to maintain the school's sustainability. This means that the support staff projected will be reduced whenever and wherever it is necessary in order for the school to maintain sustainability and to operate within its means. A contingency plan is to work with contracted staff and reduce the hours of the support staff when and if the revenues are reduce or comes in lower than projected at the beginning of each year due to reduced enrollment,

A resolution budget will be generated by the school's leadership and approved by the governing board annually before the beginning of each fiscal year and acdemic year. Since enrollment determines the revenue for the school's budget, projected and actual enrollment is to be monitored daily especially during the first 20 days of the academic year.

The proposed budget contains non-commited funds that will be used during the generation of the



### **NC Public Charters**



2024-25 budget and each year thereafter to respond to fiscal unknowns such as possible construction costs related to setting up a facility and actual school bus costs if newer pre-owned buses are acquired due to the lack of availability of a fleet of older buses or if fuel costs increase drastically without warning.

HCLA-Wake's fiscal motto shall be to operate within its means at all times.

Q226.Does the budget rely on sources of funds other than state, county, and federal (e.g., loans, donations, etc.)? If so, please provide the source and amount. Also, describe any committed contributions and in-kind donations of goods or services to be received by the charter school that will assist in evaluating the financial viability of the school. Clearly indicate between those grants or in-kind donations which have already been firmly committed and those the board is planning to pursue. Be sure that the appropriate assurances documentation is provided in the appendices.

At this point in the school's application process, the school's budget projections are relying solely on local, state and federal Exceptional Children' funds. However, once the application is approved, the planning team will seek to apply for applicable grants and other donations of goods and services to help ensure the financial sustainability of the school. For instance, we believe that the school will be eligible for a school-wide Title I grant; however, this determination cannot be made until the registration process is complete and the income status of students enrolled at the school is determined.

No grants or large donations have been promised to the school at this time.

### Q227.Provide the student to teacher ratio that the budget is built on.

The planned student to teacher ratio for Heritage Collegiate Leadership Academy-Wake is approximately 25:1 or approximately one teacher per 25 students.



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# Q228.Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully.

The founding board of HCLA-Wake has the individual and collective qualifications and capacity for implementing the school's financial plan successfully. At least four of the five board members have previously been the leader of a school or a business or organization or both in which they have had to develop and implement a successful financial plan.

# Q229.Describe how one or more high needs students with disabilities might affect the budget and your plan to meet student needs that might be more than anticipated.

One or more high needs students with disabilities might affect the budget by causing the school to expend more resources than originally planned but the school is committed to providing any needed services to all of its students regardless of their needs. If a case such as this occurs at the school, the school's leadership and special education teacher(s) will seek additional resources through grants and donations and by consulting the Regional and NCDPI Resource EC person for assistance in identifying resources that might be available to ensure that the child or children's special needs are met.

The school's budget will be adjusted each year to reflect the needs of students with disabilities should the need arise. At no time will the school dismiss a scholar or scholars because their need for services has become too expensive. Regardless of the child or children's needs, the school will seek to find a way to meet those needs regardless of the costs. Each year the budgeted contingency funds will be accessed to help to accommodate and meet the needs of students with disabilities.

Q230.If there is a plan to outsource any or all financial management areas such as payroll, benefits, audits, fundraising, accounting, etc., provide a statement on how the vendors will be selected and how the board will oversee their activities to ensure fidelity and compliance.

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According to the founding board and the planning team projections, there will be a need to outsource some of the school's financial management areas such as payroll, audits, accounting, and benefits. The vendors will be selected from exploring professionals in the field and gathering a list of recommended vendors from which a recommended vendor will be selected based on a board-approved vetting process or by using the board-approved procurement process. The board will oversee the activities of the financial vendors by receiving monthly or quarterly reports from each of them and/or the school leader in order to ensure the school's financial fidelity and compliance.

# Q231.Does the school intend to contract for services such as student accounting and financial services, exceptional children instructional support, custodial, etc? Describe the criteria and procedures for the selection of contractors and large purchases.

In each of the cases referenced above, the process that will be used to select vendors will be conducted either through a strenuous board-approved vetting process or through a board-approved procurement process. A formal process will be used to select vendors regardless of the services required. To select a vendor for large-scale purchases, a board-approved procurement process will be used to select the vendor to be recommended to the governing board. The governing board is responsible for approving all large-scale vendor purchases before the vendor can begin providing the services to the school.

For all contracted large purchases and services, the school will used a procurement process approved by the governing board and the Business Office at NCDPI.

# Q232.Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs.

Heritage Collegiate's projected budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs as all of these components were taken into consideration as the budget was being developed.

Q233.What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school will develop the fund balance.



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At least 5 percent of the expenditures will be the school's goal for a general fund balance. The school will set aside these funds for a rainy day by using local funds since they have the flexibility of carryover funds across fiscal years.

# Q234.Provide a description of proposed financing structure. Include financing of facilities, other asset financing, and leases.

The proposed financing structure of HCLA-Wake will be to use allocated state funds, then federal funds, as the federal fiscal year ends later (September rather than June 30th) than the one for state funds, then local and grant funds since they tend to have the greatest flexibility for carryover. Initially, the school will seek to lease and renovate an existing building for the school's use for the first five years and will seek out building acquisition only after the school has been operating successfully for a period longer than five years and has been approved for a renewed charter.

Q235.Will the school have assets from other sources (e.g. building, furniture, chairs, computers, etc.)? If yes, please provide a list. Note which are secured and which are anticipated, and include evidence of commitment for any assets on which the school's core operation depends.

The school will not have assets from other sources such as building, furniture, chairs, computers, etc.; therefore, no list is being provided at this time. However, with a resourceful and dedicated planning team and founding board, it is expected that some assets will be acquired prior to the planning year but it is not known what those resources will be at this time. Like in the past, it is planned that team members will write grants seek donations from businesses especially large businesses like Duke University, SAS Institute, and others including individuals who may be willing to make donations of used furniture, computers, or just make financial contributions to the school. In addition, team members will spend a lot of time at the State Surplus Warehouse almost weekly seeking to purchase economical pre-owned furniture, chairs, desks, and other basic items that will greatly reduce our initial setup costs. While there are no assets available to us at this time, it is expected that HCLA- Wake will have what will be needed to open and operate a school when it opens in August 2024.

### **12.3. Financial Compliance**



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# Q236. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate record keeping?

The school will ensure adequate internal controls by hiring a financial bookkeeper on-site who will work under the daily supervision of the school's leadership including the principal, the director, and the financial contractor, with guidance from the NCDPI Budget office. The financial structure will be set up so that all checks will need to be signed by two parties, the school's director and a board designated board member. Financial policies will be generated under the guidance of the NCDPI Budget office and will be approved by the governing board. The financial policies will be contained within a binder in the finance office with a copy available for any interested party to examine. Financial records including personnel records will be kept on site but in a locked secure area. An inventory of the school's assets will be kept on-site with electronic copies being kept off-site as a backup. An expectation of the school is that accurate and adequate record keeping will always be among the school's highest priorities.

In addition, the school's leadership and board will ensure that appropriate financial policies are reinstated to ensure that every aspect of the financial operation is covered in a policy document or documentation. It shall be a major fiscal goal of the school to have the school operate "in the black" as an ongoing practice and end with no deficits at the end of each fiscal year. The fiscal year will be consistent with the State's fiscal year which will begin on July 1st and run through June 30th.

# Q237.Provide any known or possible related party transactions (relationship, description of transaction, and estimated dollars involved).

There is no known or possible related party transactions nor is there expected to be any possible related party transactions so no information is being provided regarding this matter as a component of this application at this time.

Q238.Provide the name of the firm approved by the NC Local Government Commission (LGC) that will conduct the audit. Include the complete mailing address, telephone number, and fax number. If a firm has yet to be identified, please list the firms the board has investigated.

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The name of the firm that has agreed to conduct the financial audits for Heritage Collegiate Leadership Academy-Wake County is Petway, Mills, and Pearson (Phyllis Pearson), Post Office Box 1036, 1014 North Arendell Avenue, Zebulon, North Carolina 27567. The office telephone number is 919 269-7405, Fax 919 269-8728.

This firm has been approved by the North Carolina Local Government Commission and has previously conducted audits for other charter schools in North Carolina as well as Heritage Collegiate Leadership Academy in the past.

### 12.4. Certify

Q239.I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

Yes

O No

### Q240.Explanation (optional):

No additional explanantion is required at this time.



### **NC Public Charters**



### 13. Other Forms

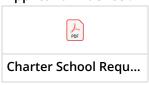
Q241.Sign the attached Charter School Required Signature Certification document and upload it as a PDF or image file.

Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 1

### Resources



### **Applicant Evidence:**



Uploaded on **4/29/2022** 

by **Kashi Bazemore** 



### **NC Public Charters**



### 14. Third-party Application Preparation

Q242. Was this application prepared with the assistance of a third-party person or group?

- O Yes
- No



### **NC Public Charters**



### 15. Application Fee

Pursuant to G.S. 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by **April 29, 2022, at 5:00 pm EDT** for Fast Track and Accelerated applications, and **April 29, 2022, at 5:00 pm EDT** for traditional timeline applications. Payments will be accepted in the form of a certified check. Cash is not accepted.

Q245.\*Application Note: The applicant must mail the certified check along with the Application Fee Payment Form (see the resources for this question) before or on the due date of April 29, 2022, at 5:00 pm EDT for Fast Track and Accelerated applicants, and April 29, 2022, at 5:00 pm EDT for traditional timeline applicants. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete. Payments should be made payable to the North Carolina Department of Public Instruction: North Carolina Department of Public Instruction

Office of Charter Schools 6307 Mail Service Center Raleigh, NC 27699-6307

I understand

### Resources



2022 Payment Form....



### **NC Public Charters**



### 16. Signature page

Q246.Fill out the attached resource and get it signed and notarized. Then upload as a PDF or image file.

Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 1

### Resources



### **Applicant Evidence:**



Uploaded on **4/27/2022** 

by Kashi Bazemore

Q247.Please digitally sign your application here

Signature

### **Applicant Comments:**

I have signed this multiple times and saved it. It keeps disappearing. I am signing this as Board Chair.



### **NC Public Charters**



### Applicant Evidence:



Uploaded on **4/29/2022** by **Kashi Bazemore** 

Final Status  Reject	O Approve
Approver Cor	nments

Powered by **Edlusion** 

6/8/2022

# List of Upper Northeast Wake County Schools (K-8) with Letter Grade of D/F on the 2018-19 NC School Report Cards

School	City	Zip Code	Letter Grade
Bugg Elementary	Raleigh	27610	F
Barwell Rd Elementary	Raleigh	27610	F
Baileywick Road Elementary	Raleigh	27615	D
Beaverdam Elementary	Raleigh	27604	D
Dillard Dr. Middle	Raleigh	27606	D
Douglas Elementary	Raleigh	27609	D
East Millbrook Middle		27616	D
	Raleigh		
East Wake Middle	Raleigh	27604	D
Forestville Rd Element.	Knightdale	27545	D
Hodge Road Elementary	Knightdale	27545	D
Lake Myra Elementary	Wendell	27591	D
Lockhart Elementary	Knightdale	27545	D
Millbrook Elementary	Raleigh	27609	D
Powell Elementary	Raleigh	27610	D
Riverbend Middle	Raleigh	27616	D
Rogers Lane Elementary	Raleigh	27610	D
Wakelon Elementary	Zebulon	27597	D
Wendell Elementary	Wendell	27591	D
Wilburn Elementary	Raleigh	27604	D
Wildwood Forest Elem.	Raleigh	27616	D
Zebulon Elementary	Raleigh	27597	D

### **HCLA School Leader Resume**

As of the Submission of the 2022 Charter School Application,	, no school leader	has been ident	ified so no
resume of that leader is being attached.			

<u>Position</u>	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Lead Administrator (s)	1	2	2	2	2	2
Assistant Principal	0	0	0	0	0	0
Finance Officer	1	1	1	1	1	1
Clerical/Office Manager	1	1	1	1	1	1
Food Service Staff	1	1	1	1	1	1
Custodians	1	2	2	2	2	2
Transportation Staff	0	1	1	1	1	1
Dean of Teaching and Learning	1	1	1	1	1	1
Dean of Students/PBIS/Discipline	1	1	1	1	1	1
School Bus Drivers	0	9	9	9	9	9
Child Nutrition Assistants	1	2	2	2	2	2
Data Manager	1	1	1	1	1	1
Core Content Teachers	1	22	25	29	30	30
Elective Specialty Teachers	1	4	4	5	5	5
Exceptional Children Teachers	1	2	2	2	2	2
Instructional Suppport Assistants	1	2	2	2	2	2
Teacher Assistants	1	10	10	10	10	10
School Counselor	0.5	1	2	2	2	2
Total Projected Staff	14.5	63	67	72	73	73
Total Number of Students	0	440	520	600	600	600

# Heritage Collegiate Leadership Academy Student Promotion and Accountability Policy

Heritage Collegiate believes that all students should progress to the next level only after they have demonstrated proficiency at their current level of instruction. In order to be promoted, students at Heritage Collegiate Leadership Academy must comply with the HCLA Compulsory Attendance Policy and meet the following standards:

HCLA will comply with all state laws related to student promotion and retention including those included in G. S 115C-83.6 and State Board of Education Policy.

### 1. Grades K-2

Students in grades K-2 must score proficient on the M-Class End of Year Assessment or show significant progress and toward meeting grade level skills. In addition, students in these grades must demonstrate proficiency in ELA and mathematics on their End-of-year Report Card.

In addition, students in grades K-2 must pass one other core subject such as Science or Social Studies and one elective such as technology or physical education.

### 2. Grade 3

Students in grade 3 must demonstrate grade-level proficiency in reading, in accordance with the Read to Achieve State Law and State Board of Education policy. In addition, students at grade 3 are to demonstrate proficiency on their End-of Year Report Card in ELA.

Students in grade 3 must also demonstrate grade-level proficiency in mathematics, in accordance with State Board of Education policy. In addition, students at grade 3 are to demonstrate proficiency on their End-of Year Report Card in mathematics.

Students in grade 3 must also pass one other core subject such as Science or Social Studies and one elective such as technology or physical education.

### 3. Grades 4-8

Students in grades 4-8 should demonstrate grade-level proficiency and make adequate academic growth for the year in ELA and mathematics.

Students in grades 4-8 should achieve grade level proficiency (Level III or higher) on the NC EOG Assessments in ELA and Mathematics.

Students in Grade 5 and 8 should achieve grade level proficiency (Level III or higher) on the NC EOG Assessment in Science.

In addition, students in grades 4-8 must pass one other core subject such as Science or Social Studies and one elective such as technology or physical education.

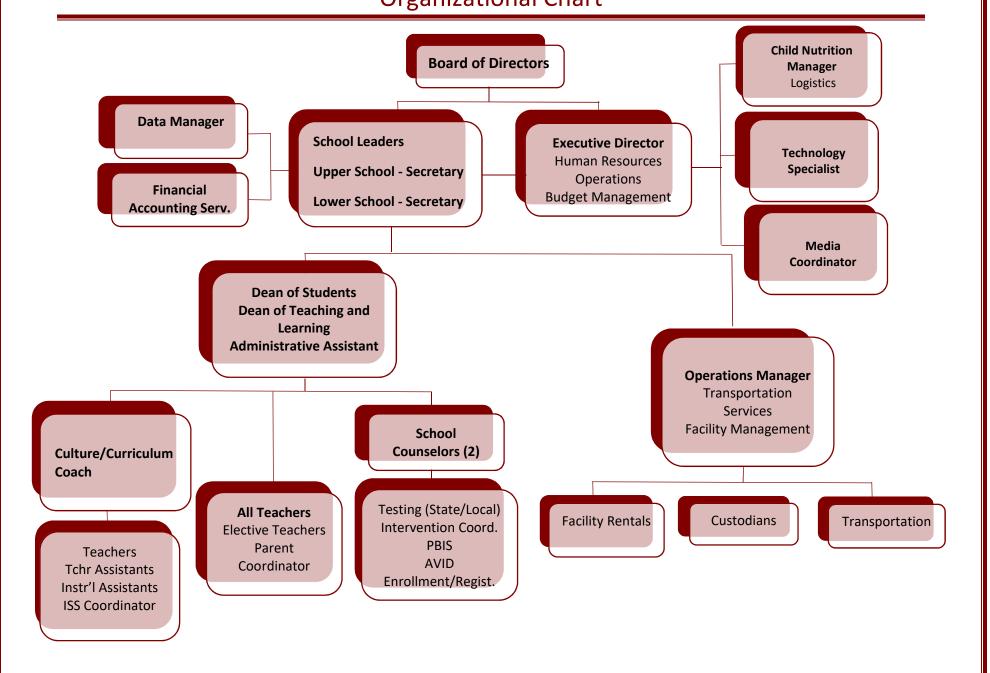
Students who do not meet these standards will be given the opportunity for additional instruction and retesting in summer instructional camps to be held on the HCLA campus.

Appeals of HCLA's promotion and retention decisions must follow the HCLA grievance policy.

HCLA must comply with State and State Board of Education Annual Reporting Policies to report student performance annually to parents, the SBE, and the school's Board of Directors. In addition, HCLA is to report at least quarterly a summary of student performance to the HCLA Board of Directors.

This policy was adopted by the HCLA Board of Directors on March 21, 2018.

# Heritage Collegiate Leadership Academy Organizational Chart



# Heritage Collegiate Leadership Academy Organizational Chart

July 23, 2020

This is version 1 of the Heritage Collegiate Leadership Academy Organizational Chart. It is a work in progress. As the Board examines the overall budget leading up to the first year of school, this organizational chart is subject to change in order to ensure that the final staffing plan aligns with the actual staffing budget.

Best regards,

Dr. Kashi Bazemore Board Chair HCLA, A proposed K-8, College and Career Prep Academy

llegiate Leadership Academ 5601 Paul Road Raleigh, NC 27616-5319 Raleigh, NC 2

# Petition of Support

hool. Collegiate Leadership Academy of Wa

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27887	2760A	21616	276/6	22766 234616	27613	2710A	17820	Zip Code
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# Heritage Collegiate Leadership Academy-Wake

5601 Paul Road Raleigh, NC 27616-5319

Growing Great Leaders

Serving Our Community

# Petition of Support

charter Collegiate Leadership Academy of Wa

Bruce Spirat Spi	Printed Name
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Reservation of the Servation of the Serv	Signature Signature
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# Heritage Collegiate Leadership Academy-Wake

5601 Paul Road Raleigh, NC 27616-5319

rowing Great Leaders

erving Our Community

# Petition of Support

Collegiate Leadership Academy of Wa

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Phone Number  9/9/4/= 3384	Zip Code  2ip Code	Revent NC	Street Address Day 2 Barram D	Signature Monay	Kinger Williame

		Kindergarten				First Grade			Second Grade
Start Time	End Time	All Classes		Start Time	End Time	All Classes	Start Time	End Time	All Classes
8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting		8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting	8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meet
8:20	8:25 AM	Clean Up	Ī	8:20 AM	8:25 AM	Clean Up	8:20 AM	8:25 AM	Clean Up
8:25 AM	9:55 AM	Literacy Block		8:25 AM	8:40 AM	Mindfulness/Go Noodle	8:25 AM	9:55 AM	Literacy Block
10:00 AM	10:15 AM	Mindfulness/Go Noodle		8:40 AM	9:25 AM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level PLC	9:55 AM	10:55 AM	Nonfiction Studies: Social Studies/Scie
10:15 AM	11:00 AM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level PLC		9:45 AM	11:15 AM	Literacy Block	11:00 AM	11:15 AM	D.E.A.R.
11:05 AM	11:20 AM	D.E.A.R.		11:15 AM	11:30 AM	D.E.A.R.	11:15 AM	11:45 AM	Lunch
11:25 AM	11:55	Lunch		11:30 AM	12:00 PM	Lunch	11:45 AM	12:05 PM	Bathroom/Recess
11:55 AM	12:15 PM	Bathroom/Recess		12:00 PM	12:20 PM	Bathroom/Recess	12:10 PM	1:40 PM	Math Block
12:20 PM	1:50	Math Block		12:25 PM	1:55 PM	Math Block	1:45 PM	2:00 PM	Mindfulness/Go Noodle
9	2:53 PM	Nonfiction Studies: Social Studies/Science		1:58 PM	2:58 PM	Nonfiction Studies: Social Studies/Science	2:00 PM	2:45 PM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level
2:56	3:10 PM	AVID-Organization / HW / Pack Up	l	3:00 PM	3:15 PM	AVID-Organization / Homework	2:45 PM	3:05 PM	AVID-Organization / Homework
3:10 PM	3:25 PM	Bathroom/Clean Up		3:15 PM	3:25 PM	Bathroom/Clean Up	3:05 PM	3:25 PM	Bathroom/Clean Up/ Pack Up
3:25 PM		Dismissal		3:25 PM		Dismissal	3:25 PM		Dismissal
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ID# 31954

INTERNAL REVENUE SERVICE P. O. BOX 2508 CINCINNATI, OH 45201

Date: JUL 2 1 2014

HERITAGE COLLEGIATE LEADERSHIP
ACADEMY OF BERTIE COUNTY INC
1042 NC 305
AULANLDER, NC 27805

Employer Identification Number: 46-1809428 DLN: 17053107316004 Contact Person: CUSTOMER SERVICE Contact Telephone Number: (877) 829-5500 Accounting Period Ending: December 31 Public Charity Status: 170(b)(1)(A)(ii) Form 990 Required: Effective Date of Exemption: April 20, 2012 Contribution Deductibility: Yes Addendum Applies: No

### Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Director, Exempt Organizations

Tamera Ripperda

SOSID: 1255604 Date Filed: 4/20/2012 2:31:00 PM Elaine F. Marshall North Carolina Secretary of State C201210300495

## State of North Carolina Department of the Secretary of State

## ARTICLES OF INCORPORATION NONPROFIT CORPORATION

Pursuant to §55A-2-02 of the General Statutes of North Carolina, the undersigned corporation does hereby submit these Articles of Incorporation for the purpose of forming a nonprofit corporation.

1.	The name of the corporation is: Heritage Collegiate Leadership Academy of Bertie County, Inc.
2.	(Check only if applicable.) The corporation is a charitable or religious corporation as defined in NCGS §55A-1-40(4)
3.	The street address and county of the initial registered office of the corporation is:
	Number and Street 1042 NC 305
	City, State, Zip Code Aulander, NC 27805 County Bertie
4,	The mailing address if different from the street address of the initial registered office is:
	P.O. Box 1377 Windsor, NC 27983
5.	The name of the initial registered agent is:
	Mildred G. Bazemore
6.	The name and address of each incorporator is as follows: Kashi B. Nelson, 5601 Paul Road, Raleigh, NC 27616
7.	(Check either a or b below.)  a The corporation will have members.  b The corporation will not have members.
8.	Attached are provisions regarding the distribution of the corporation's assets upon its dissolution.
9.	Any other provisions which the corporation elects to include are attached.
10.	The street address and county of the principal office of the corporation is:
	Number and Street 1042 NC 305
•	City, State, Zip Code Aulander, NC 27805 County Bertie
11.	The mailing address if different from the street address of the principal office is:
	P.O. Box 1377, Windsor, NC 27983

Revised January 2000

Form N-01

CORPORATIONS DIVISION

P. O. BOX 29622

RALEIGH, NC 27626-0622

12.	These articles will be effective upon filing, unless a later time	and/or date is specified:
	This is the 12th day of April ,20 12	
		Heritage Collegiate Leadership Academy of Bertie County, Inc.

Signature of Incorporator

Kashi B. Nelson, Incorporator

Type or print Incorporator's name and title, if any

NOTES:

1. Filing fee is \$60. This document must be filed with the Secretary of State.

Revised January 2000

Form N-01

Purpose	of	Corporation
---------	----	-------------

This corporation is organized for the following purpose(s) (check as applicable)	ie):
religious,	
charitable,	
educational,	
testing for public safety,	
scientific,	,
literary,	
fostering national or international amateur sports competition, and/or	que :
prevention of cruelty to children or animals,	
including, for such purposes, the making of distributions to organizations that	

including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under Sections 501(c)(3) and 170(c)(2) of the Internal Revenue Code of 1986 (herein the "Code") (or the corresponding provisions of any future United States Internal Revenue Code).

### **Prohibited Activities**

No part of the net earnings of the corporation shall inure to the benefit of or be distributable to, its members, directors, officers, or other private persons except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of purposes set forth in these articles of incorporation. No substantial part of the activities of the corporation shall be the carrying on of propaganda or otherwise attempting to influence legislation, and the corporation shall not participate in or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provisions of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Section 501(c)(3)

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of the Code or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Code.

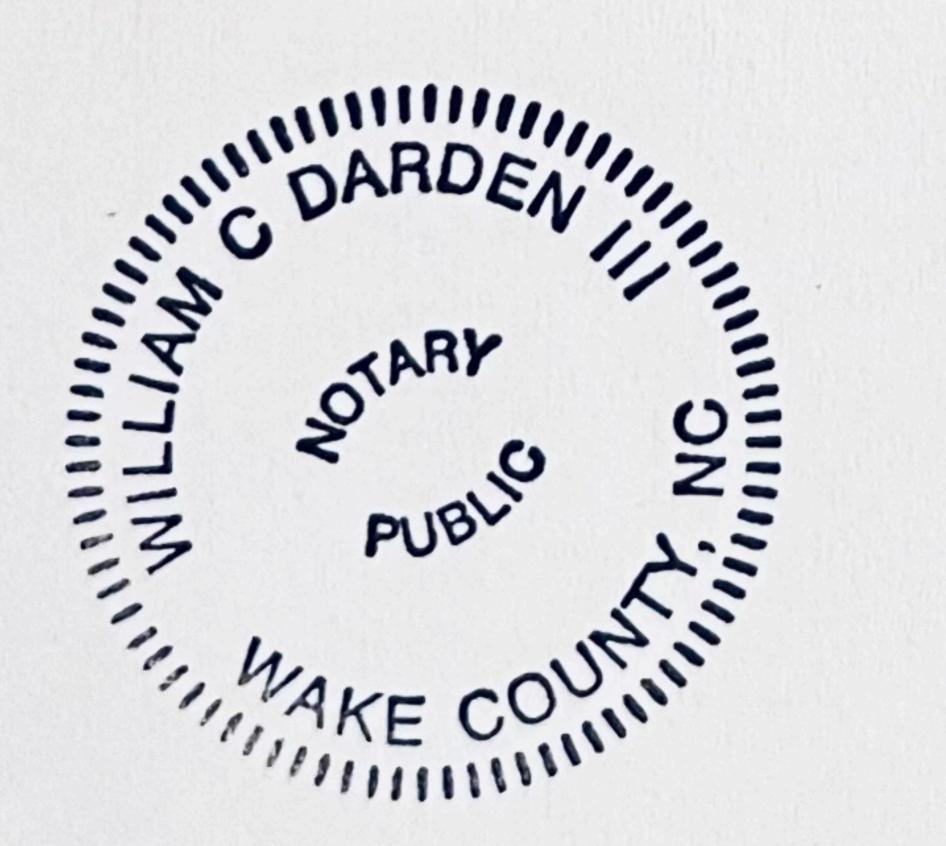
### **Distributions Upon Dissolution**

Upon the dissolution of the corporation, the Board of Directors shall, after paying or making provision for the payment of all of the liabilities of the corporation, dispose of all of the assets of the corporation exclusively for the purposes of the corporation in such manner, or to such organization or organizations organized and operated exclusively for religious, charitable, educational, scientific or literary purposes as shall at the time qualify as an exempt organization or organizations under Section 501(c)(3) of the Code as the Board of Directors shall determine, or to federal, state, or local governments to be used exclusively for public purposes. Any such assets not so disposed of shall be disposed of by the Superior Court of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organizations, such as the court shall determine, which are organized and operated exclusively for such purposes, or to such governments for such purposes.

# Signature Page

The foregoing application is submitted on behalf of Heritage Collegiate Leadership Academy of Wake County. The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy "Planning Year for New and Preliminary Charter Schools – CHTR 013, all new nonprofit boards receiving a charter must participate in a year-long planning program prior to the charter school's opening for students. The planning year provides an applicant time to prepare for the implementation of the school's curricular, financial, marketing, and facility plans. During this planning year, regular meetings are held with the Board of Directors and consultants from the Office of Charter Schools to provide information on the following topics: school opening plans, staff development, finance, governance, board training, marketing, policies, and procedures, securing a school site, and hiring a school administrator. Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name:Kashi L. Bazemore
Board Position:Board Chair
Signature:
Date: 4/26/22
Sworn to and subscribed before me this <u>IL</u> day of <u>April</u> , 20 <u>22</u> .
OWOTH to and subscribed before the time,,,
Notary Public: Willie C. Deline Official Seal:
My commission expires: 5 14 , 20 23 .



### Heritage Collegiate Leadership Academy

### 2032: GRIEVANCE POLICY

A student, parent/guardian or employee may initiate the grievance process to appeal any final decision of school personnel within the school. A student, parent, or guardian wishing to initiate the grievance process shall make a written request for a conference with the principal to discuss the grievance to seek resolution. The request shall detail the basis for the grievance, name the specific policy, rule or law believed to have been violated, and specify the relief being sought. The grievance shall be filed with thirty (30) calendar days after the act or condition that provides the basis for the grievance. The principal shall grant the conference within five (5) school days following receipt of the request. The principal will state in writing his/her position on the issue to the student, parent/guardian or employee within five (5) school days following the conference.

If the grievance is not resolved at the principal's level, the student, parent/guardian or employee may appeal the principal's decision in writing to the executive director of the school. The appeal must be made within five (5) school days following receipt of the written response from the principal. The executive director shall review the grievance within five (5) school days following receipt of the appeal. If the executive director or his/her designee determines that additional time is needed to develop the factual record, the grievance may be put on hold for fifteen (15) additional days (or longer if by mutual agreement) to allow time for an investigation. A written response shall be made to the student, parent/guardian or employee, and principal from the executive director within ten (10) school days following the review.

If the grievance is not resolved at the level of the executive director, the student, parent/guardian or employee may appeal the executive director's decision in writing to the Board of Directors of the school by submitting the written appeal to the Chairman of the Board of Directors. The written appeal must be made within 10 school days following the student, parent/guardian or employee's response from the executive director of the school. The board shall offer a final written decision within ten (10) days. If the grievant fails to comply within the time periods or other procedures outlined in this policy, the grievant waives any further rights of appeal and the grievance will be considered resolved. The grievance may be voluntarily withdrawn by the grievant at any level or time. Once a grievance is withdrawn it cannot be reopened. If at any time during the grievance process the school grants the grievant the relief requested, the grievance shall be terminated at that time.

The principal shall disseminate the grievance policy to students, families and employees at the beginning of each school year.

# HERITAGE COLLEGIATE LEADERSHIP ACADEMY OF BERTIE COUNTY, INC. BYLAWS

### **ARTICLE I**

### Offices

- **1.1 Principal Office.** The principal office of the Corporation shall be located at 1042 NC 305, Aulander, NC 27805, or at such other location designated by the Board of Directors.
- **1.2 Registered Office.** The registered office of the Corporation required by law to be maintained in the State of North Carolina may be, but need not be, identical with the principal office.
- **1.3 Other Offices.** The Corporation may have offices at such other places, either within or without the State of North Carolina, as the Board of Directors may designate or as the affairs of the Corporation may require from time to time.

### **ARTICLE II**

### **Board of Directors**

- **2.1 General Powers.** The business and affairs of the Corporation shall be managed by its Board of Directors. Except as otherwise expressly provided by law, the Articles of Incorporation, or these Bylaws, all of the power of the Corporation shall be vested in the Board of Directors.
- 2.2 Composition. Number, Term and Qualifications. The number of directors constituting the Board of Directors shall be a variable range with a minimum of five (5) and a maximum of fifteen (15). Each director shall hold office for a term of one (1) to three (3) years. Following the first year of the Corporation's existence, each term year shall begin on July 1 and end on June 30. The initial Board of Directors shall serve staggered terms to establish a rotation of directors as follows: one to two directors with a one year term, two directors with a two year term, and two directors with a three year term; or, if there are seven initial directors, then two directors with a one year term, two directors with a two year term and three directors with a three year term. A majority of the board members must be residents of North Carolina. All board members must be a resident of the United States of America. Directors shall be at least twenty-one (21) years of age and shall hold at least a high school diploma or its equivalent.

Any such qualified person seeking election to the Board of Directors must submit to a reasonable screening process by the nominating committee, which shall include submitting a personal written statement that may include, but not be limited to the following:

- statement as to personal reason for wanting to serve on the Board of Directors of this corporation;
- certification statement as to age, residency, and diploma or equivalency; certification statement of having read and understood the Articles of Incorporations and these Bylaws;
- statement of support for this corporation's purposes;
- statement of personal education philosophy;
- statement of personal background, including any talents or experience that can contribute to the function of the corporation Board;
- separate list of references, including the name, address and phone number of each, to designated board member who can verify personal background.
- **2.3 Election of Directors.** New directors shall be elected in each succeeding year to fill any expiring terms. Directors eligible for re-election may vote on new board members. Those receiving the highest number of votes shall be deemed elected. In the event any Director so demands, election of the Directors shall be by secret ballot. Directors shall be elected from a slate of nominees proposed by the Executive director at any annual or special meeting of the Board of Directors by a voted of a majority of the directors then in office. The Executive Director shall nominate up to two persons per open position and directors. Directors may serve successive terms. The election of directors shall be a part of business at each annual meeting of the Board of Directors. Each director shall hold office until the next annual meeting of the Board of Directors following the start of his or her last year in office and until his or her successor is elected and qualifies.
- **2.4 Removal.** Directors may be removed from office at any time with our without cause by the directors by such vote as would be required to elect a member of the Board of Directors.
- **2.5 Vacancies.** Any vacancy occurring in the Board of Directors may be filled by the affirmative vote of a majority of the remaining directors. The director so elected shall serve the unexpired term of the director replaced thereby.
- **2.6** Chairman of the Board. There shall be a Chairman and Vice-chairman of the Board of Directors elected by the directors from their number at the annual meeting of the Board of Directors. The Chairman and Vice-Chairman shall serve a term of one year. The

Chairman, or in his or her absence the Vice-Chairman, shall preside over all meetings of the Board of Directors, and each shall perform such other duties as may be directed by the Board of Directors. The Chairman and Vice-Chairman shall be officers of the Corporation.

- **2.7 Compensation.** The Board of Directors may not be compensated for their services as such. The corporation may provide for the payment of any or all expenses incurred by directors in attending regular and special meetings of the Board of Directors. This shall not preclude directors from serving the Corporation in other capacities and receiving compensation for such other services.
- **2.8 Duties of Directors.** The Board of Directors shall abide by the general standards of conduct of a Board as prescribed by N.C.G.S. §55A-8-30, including but not limited to acting in good faith, the care of an ordinary prudent person in a like position exercised under similar circumstances and in a manner each director reasonably believes to be in the best interest of the Corporation.
- **2.9 Commitment to Open Meetings.** The Board of Directors expressly commits to and shall abide by the public policy of the State of North Carolina in regards to meetings of public bodies as described in Article 33C or N.C.G.S. §143-318.9, et. Seq. It is the policy of the Corporation that the hearings, deliberations, and actions of its Board of Directors shall be conducted openly whenever necessary for compliance with state law or otherwise reasonably appropriate.

### ARTICLE III

### Meetings of Directors

- **3.1 Regular Meetings.** The Board of Directors shall meet at least monthly at such times and dates as designated by the Chair of the Board, through a written call of the majority of Board members, or upon resolution of the board. The annual meeting of the Board shall be held each year in June or at such other time as the Board may determine, for the purpose of electing directors and officers and for the purpose of electing directors and officers and for the transaction of other business. Regular meetings of the Board may be held without written notice.
- **3.2 Special Meetings.** Special meetings of the Board of Directors may be called by or at the request of the Chairman or any two (2) directors.
- **3.3 Place of Meetings.** The meetings of the Board of Directors shall be held at the principal office of the Corporation, or at such other place as the Chair of the Board of Directors, or his or her designee, may designate.

- **3.4 Notice of Meetings.** The Executive Director shall give notice of each annual meeting of the Board of Directors by mailing such notice to each director at least ten (10) days before the meeting. The Chairman or other persons calling a special meeting of the Board of Directors shall give notice thereof (or cause the Executive Director to give notice) by mailing such notice to each director at least three days before the meeting. Unless otherwise indicated in the notice thereof, any and all business may be transacted at a meeting of the Board of Directors, except as otherwise provided by law or these Bylaws.
- 3.5 Waiver or notice and Notice of Inability to Attend. Any director may waive notice of any meeting, either before or after the meeting. Written waivers of notice shall be filed by the Secretary with the corporate records as part of the minutes of the meeting. The attendance by a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. Members of the board are asked to notify the Chair of the Board of the Corporation of their inability to attend a lawfully scheduled meeting at least twenty-four (24) hours prior to meeting time.
- **3.6 Quorum.** A majority of the number of directors fixed by these Bylaws shall constitute a quorum for the transaction of business at any meeting of the Board of Directors. For example, five (5) board members, a quorum is three (3); for six (6) board members, a quorum is four (4), and for seven (7) board members, a quorum is four (4).
- **3.7 Manner of Acting.** Except as otherwise provided in these Bylaws, the act of the majority of the directors present at a meeting at which a quorum is present shall be the act of the Board of Directors. To the extent under these Bylaws and by law, directors shall conduct business at every regular and annual meeting in accordance with *Robert's Rules of Order*, latest edition.
- **3.8 Presumption of Assent.** A director of the Corporation who is present at a meeting of the Board of Directors at which action on any corporate matter is taken shall be presumed to have assented to the action taken unless he or she objects at the beginning of the meeting, or promptly upon his or her arrival, to holding it or transacting business at the meeting, or his or her dissent or abstention from the action is otherwise entered in the minutes of the meeting, or unless he or she either files his written dissent to such action with the person acting as the secretary of the meeting before the adjournment thereof or forwards his or her written dissent by registered mail to the Executive Director of the Corporation immediately after the adjournment of the meeting. The right to dissent is not available to a director who voted in favor of such action.
- **3.9 Participation by Telephone.** Any one or more directors may participate in a meeting of the Board of Directors by means of a conference telephone or similar communications device that allows all persons participating in the meeting to hear each other. Participation by these means shall be deemed presence in person at the meeting.

### **ARTICLE IV**

### Officers

- 4.1 **Titles.** The Board of Directors shall elect a Chairperson of the Board of Directors, a Vice-Chairperson of the Board of Directors, and a Secretary of the Board of Directors, and such other officers as it may from time to time deem necessary. Except as otherwise provided in these bylaws, the additional officers shall have the authority and perform the duties as from time to time may be prescribed by the Board of Directors. Any two or more offices may be held by the same individual, but no officer may act in more than one capacity where action of two or more officers is required.
- 4.2 **Election and Term.** The officers of the corporation shall be elected by the Board of Directors at the annual meeting. Each officer shall hold office until the next annual meeting and until a successor is elected and qualifies.
- 4.3 **Removal.** Any officer or agent elected or appointed by the Board of Directors may be removed at any time by the Board with or without cause.
- 4.4 **Resignation.** An officer or agent may resign at any time by communicating such resignation to the corporation. A resignation is effective when it is communicated unless it specifies in writing a later effective date.
- 4.5 **Vacancies.** Vacancies among the officers may be filled and new offices may be created and filled by the Board of Directors.
- 4.6 **Chairperson of the Board of Directors.** The Chairperson of the Board of Directors, if such officer is elected, shall preside at meetings of the Board of Directors and shall have such other authority and perform such other duties as the Board of Directors shall designate.
- 4.7 **Vice Chair.** The Vice Chair shall exercise the powers of the Chairperson during that officer's absence or inability to act. Any action taken by a Vice Chair in the performance of the duties of the Chairperson shall be presumptive evidence of the absence or inability to act of the Chairperson at the time the action was taken. The Vice Chair shall have such other powers and perform such other duties as may be assigned by the Board of Directors.
- 4.8 **Secretary.** The Secretary shall keep accurate records of the acts and proceedings of all meetings of the Board of Directors and shall give all notices required by law and these bylaws. The Secretary shall have general charge of the corporate books and records. The Secretary shall sign such instruments as may require the signature of the Secretary and in general shall perform all the duties incident to the office of Secretary and such other duties as may be assigned from time to time by the President or by the Board of Directors.

### ARTICLE V

### Indemnification of Directors and Officers

- 5.1 General Policy. It shall be the policy of the corporation to indemnify to the maximum extent permitted by Chapter 55A and 115C of the General Statutes of North Carolina any one or more of the Directors, officers, employees, or agents and former Directors, officers, employees, or agents of the corporation, and persons who serve or have served at the request of the corporation as directors, officers, partners, trustees, employees or agents of another foreign or domestic corporation, partnership, joint venture, trust or other enterprise, against judgments, penalties, settlements and other liabilities incurred by them in connection with any pending, threatened or completed action, suit or proceeding, whether civil, criminal, investigative or administrative (a "proceeding") and against reasonable costs and expenses (including attorneys' fees) in connection with any proceeding, where such liabilities and litigation expenses were incurred incident to the good faith performance of their duties.
- 5.2 **Use of Corporate Funds.** The corporation may advance expenses in connection with any proceeding to any such person in accordance with applicable law. The use of funds of the corporation for indemnification or for purchase and maintenance of insurance for the benefit of the persons designated in Section 1 of this Article shall be deemed a proper expense of the corporation.

### ARTICLE VI

### Indebtedness

No indebtedness of the Corporation in excess of \$20,000 shall be incurred other than in the normal course of business, except as may be approved by an act of the Board of Directors.

Any or all of such indebtedness may be represented by notes, debentures, bonds, or other securities, either unsecured or secured by, or issued under, a mortgage, trust indenture, or otherwise, and may be issued at such times and upon such terms as the Board of Directors shall determine.

### **ARTICLE VII**

Contracts, Loans, Checks, and Deposits

- **7.1 Contracts.** The Board of Directors may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation, and such authority may be general or confined to specific instances.
- **7.2 Loans.** No loans shall be contracted on behalf of the Corporation, and no evidence of indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

- **7.3 Checks and Drafts.** All checks, drafts, or other orders for the payment of money, issued in the name of the Corporation, shall be signed by such officer or officers, agent or agents, or employee or employees of the Corporation and in such manner, including facsimile signatures, as shall from time to time be determined by resolution of the Board of Directors.
- **7.4 Deposits.** All funds of the Corporation not otherwise employed shall be deposited from time to time to the credit of the Corporation in such depositories as the Board of Directors may select.

### **Article VIII**

### **General Provisions**

- **8.1 Waiver of Notice.** Whenever any notice is required to be given to any director by law, by the Articles of Incorporation, or by these Bylaws, a waiver thereof in writing signed by the director or directors entitled to such notice, whether before or after the time stated therein, shall be equivalent to the giving of such notice.
- **8.2 Fiscal Year.** The end of the fiscal year of the Corporation shall be June 30.
- **8.3** Amendment of Bylaws. Except as otherwise provided by law, by the Articles of Incorporation or herein, these Bylaws may be amended or repealed and new Bylaws may be adopted by the affirmative vote of a majority of the directors then holding office at any annual or special meeting of the Board of Directors; provided, however, that notice of the proposed action shall have been included in the notice of the meeting or shall have been waived as provided in these Bylaws.
- **8.4 Validity of Signatures.** In case any person whose signature shall appear on any bond, note, or other evidence of indebtedness of the Corporation shall cease to be an officer or hold an office different from that held at the time of signature before the delivery of such instrument, such signature shall nevertheless be valid and sufficient for all purposes the same as if he or she had remained in such office until such delivery.

### **Article IX**

### Conflict of Interest

<u>Conflict of Interest</u>. A Director shall inform the Board of Directors of any direct or indirect conflict of interest which the Director has with regard to any transaction contemplated by the Board of Directors (a "Conflict of Interest"). A Conflict of Interest shall exist in Board actions including, but not be limited to, actions concerning a transaction:

- (i) in which the Director has a material financial interest, or
- (ii) in which the Director is presently serving as a director, trustee, officer or general partner of another party.

Pursuant to the provisions of Section 55A-8-31 of the General Statutes of North Carolina, the Director may participate in the discussion but may not vote on the transaction and when a Director does not vote because of a Conflict of Interest, the act of the majority of the Directors voting shall be the act of the Board of Directors if a quorum is present at the meeting.

### **Section 1. Purpose of Conflict of Interest Policy**

The purpose of this conflict of interest policy is to protect this tax-exempt corporation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the corporation or any "disqualified person" as defined in Section 4958(f)(1) of the Internal Revenue Code and as amplified by Section 53.4958-3 of the IRS Regulations and which might result in a possible "excess benefit transaction" as defined in Section 4958(c)(1)(A) of the Internal Revenue Code and as amplified by Section 53.4958 of the IRS Regulations. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

### **Section 2. Definitions**

- a. <u>Interested Person</u>. Any director, principal officer, member of a committee with governing board delegated powers, or any other person who is a "disqualified person" as defined in Section 4958(f)(1) of the Internal Revenue code and as amplified by Section 53.4958-3 of the IRS Regulation, who has a direct or indirect financial interest, as defined below, is an interested person.
- b. <u>Financial Interest</u>. A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
- 1. An ownership or investment interest in any entity with which the corporation has a transaction or arrangement,

- 2. A compensation arrangement with the corporation or with any entity or individual with which the corporation has a transaction or arrangement, or
- 3. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the corporation is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Section 3, paragraph B, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

### **Section 3. Conflict of Interest Avoidance Procedures**

**a. Duty to Disclose.** In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

**b.** Determining Whether a Conflict of Interest Exists. After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

c. Procedures for Addressing the Conflict of Interest. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

After exercising due diligence, the governing board or committee shall determine whether the corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the corporation's best interest, for its own benefit, and whether it is fair and

reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

d. Violations of the Conflicts of Interest Policy. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose and actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

### Section 4. Records of Board and Board Committee Proceedings

The minutes of meeting of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing boards or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangements, and a record of any votes taken in connection with the proceedings.

### **Section 5. Compensation Approval Policies**

A voting member of the governing board who receives compensation, directly or indirectly, from the corporation for services is precluded from voting on matters pertaining to that member's compensation.

A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the corporation for services is precluded from voting on matters pertaining to that member's compensation.

No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the corporation, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

When approving compensation for directors, officers and employees, contractors, and any other compensation contract or arrangement, in addition to complying with the conflict of

interest requirements and policies contained in the preceding and following sections of this article as well as the preceding paragraphs of this section of this article, the board or a duly constituted compensation committee of the board shall also comply with the following additional requirements and procedures:

- a. The terms of compensation shall be approved by the board or compensation committee prior to the first payment of compensation.
- b. All members of the board or compensation committee who approve compensation arrangements must not have a conflict of interest with respect to the compensation arrangement as specified in IRS Regulation Section 53.4958-6(c)(iii), which generally requires that each board member or committee member approving a compensation arrangement between this organization and a "disqualified person" (as defined in Section 4958(f)(1) of the Internal Revenue Code and as amplified by Section 53.4958-3 of the IRS Regulations):
- 1. is not the person who is the subject of the compensation arrangement, or a family member of such person;
- 2. is not in an employment relationship subject to the direction or control of the person who is the subject of the compensation arrangement
- 3. does not receive compensation or other payments subject to approval by the person who is the subject of the compensation arrangement
- 4. has no material financial interest affected by the compensation arrangement; and
- 5. does not approve a transaction providing economic benefits to the person who is the subject of the compensation arrangement, who in turn has approved or will approve a transaction providing benefits to the board or committee member.
- c. The board or compensation committee shall obtain and rely upon appropriate data as to comparability prior to approving the terms of compensation. Appropriate data may include the following:
- 1. Compensation levels paid by similarly situated organizations, both taxable and taxexempt, for functionally comparable positions. "Similarly situated" organizations are those of a similar size, purpose, and with similar resources.
- 2. The availability of similar services in the geographic area of this organization
- 3. Current compensation surveys compiled by independent firms
- 4. Actual written offers from similar institutions competing for the services of the person who is the subject of the compensation arrangement

As allowed by IRS Regulation 4958-6, if this organization has average annual gross receipts (including contributions) for its three prior tax years of less than \$1 million, the board or compensation committee will have obtained and relied upon appropriate data as to comparability if it obtains and relies upon data on compensation paid by three comparable organizations in the same or similar communities for similar services.

- d. The terms of compensation and the basis for approving them shall be recorded in written minutes of the meeting of the board or compensation committee that approved the compensation. Such documentation shall include:
- 1. The terms of the compensation arrangement and the date it was approved
- 2. The members of the board or compensation committee who were present during debate on the transaction, those who voted on it, and the votes cast by each board or committee member
- 3. The comparability data obtained and relied upon and how the data was obtained
- 4. If the board or compensation committee determines that reasonable compensation for a specific position in this organization or for providing services under any other compensation arrangement with this organization is higher or lower than the range of comparability data obtained, the board or committee shall record in the minutes of the meeting the basis for its determination.
- 5. If the board or committee makes adjustments to comparability data due to geographic area or other specific conditions, these adjustments and the reasons for them shall be recorded in the minutes of the board or committee meeting.
- 6. Any actions taken with respect to determining if a board or committee member had a conflict of interest with respect to the compensation arrangement, and if so, actions taken to make sure the member with the conflict of interest did not affect or participate in the approval of the transaction (for example, a notation in the records that after a finding of conflict of interest by a member, the member with the conflict of interest was asked to, and did, leave the meeting prior to a discussion of the compensation arrangement and a taking of the votes to approve the arrangement).
- 7. The minutes of board or committee meetings at which compensation arrangements are approved must be prepared before the later of the date of the next board or committee meeting or 60 days after the final actions of the board or committee are taken with respect to the approval of the compensation arrangements. The minutes must be reviewed and approved by the board and committee as reasonable, accurate, and complete within a reasonable period thereafter, normally prior to or at the next board or committee meeting following final action on the arrangement by the board or committee.

### **Section 6. Annual Statements**

Each director, principal officer, and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands that corporation is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

### Section 7. Periodic Reviews

To ensure the corporation operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's-length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the corporation's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit, or in an excess benefit transaction.

### **Section 8. Use of Outside Experts**

When conducting the periodic reviews as provided for in Section 7, the corporation may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

### Heritage Collegiate Leadership Academy Admissions and Lottery Application Policy

Heritage Collegiate Leadership Academy (HCLA) is a tuition free public charter school located in Bertie County North Carolina. Any child who is qualified under the laws of North Carolina for admission to a public school is qualified for admission to Heritage Collegiate Leadership Academy as long as the student is a resident of North Carolina. HCLA does not limit admission to students based on intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion, or ancestry. The school shall be subject to any court-ordered desegregation plan in effect for the local school administrative unit. Admission to HCLA is not limited to students of Bertie County but includes attendance areas from all over the state.

An exception is that HCLA may refuse admission to any student who has been expelled or suspended from a public school, or from a private school for any conduct that would have warranted suspension or expulsion from any public school under G.S. 115C-390.5 through G.S. 115C-390.11. Students will be refused admission to HCLA until the period of suspension or expulsion for that student has expired at the previous school.

### A. Enrollment Priorities

HCLA makes every effort to enroll students that reflect the diversity of the general population of the community in which it is located.

HCLA may give enrollment priority in certain instances as stated in G.S. 115C-218.45 which grants the following enrollment priorities that will be implemented in the manner described below:

- 1. Siblings of currently enrolled students who were admitted to HCLA in a previous year. The term "siblings" includes any of the following who reside in the same household: full siblings, half siblings, step-siblings, and children residing in a family foster home.
- 2. Should there be more siblings than there are open slots in any given grade, a lottery will be held to randomly select the siblings who receive a slot in the school. The lottery will follow the same procedures as outlined below for the school-wide lottery and will be held on the same date, but prior to, the school-wide lottery. Any siblings who do not receive an enrollment slot will be placed at the top of the grade-level waiting list for the school, in the order their names were drawn in the lottery.
- 3. The following groups are limited to no more than fifteen percent (15%) of the school's total enrollment, unless a waiver is granted by the State Board of Education:
- a. Children of the HCLA's full-time employees and
- b. Children of HCLA's Board of Directors.

Should the above two groups of students exceed 15% of the school's total enrollment, priority will be given as follows: i. Each employee and director (in Year 1 only) shall be granted one enrollment slot. ii. Names of any additional children will be entered into a lottery. Names will be drawn at random until the 15% cap is reached. iii. Any children not selected in the lottery may be entered into the school-wide lottery with equal opportunity of selection as any other applicant to the school. In these cases, the

parents/guardians shall submit a completed application within the Open Enrollment Period. iv. In the following year, unenrolled siblings may be given priority under the sibling preference (number 1 above).

4. A student who was enrolled in the HCLA within the two previous school years but left the school because of the family's relocation to a community where HCLA was not accessible, a competitive admission residential program; or because of the vocational opportunities, including Active Duty, of the student's parent.

Evidence of participation in an academic program abroad, residential program, or vocational opportunities must be provided to the HCLA prior to the end of the Open Enrollment Period. In any case where the validity of the academic program or vocational opportunity is in question, the Executive Director shall have the authority to investigate documentation supporting the program or opportunity and issuing a determination of the student's eligibility for the enrollment priority.

5. A student who was enrolled in another charter school in the State in the previous school year that does not offer the student's next grade level.

### **B. Enrollment Period and Applications**

HCLA will establish an enrollment period annually. The enrollment period will generally be established consistent or similar to the enrollment periods of other schools in the area, and will be long enough to provide a reasonable opportunity for applicants to submit applications, and will be no less than **four** weeks. The enrollment period will be posted on HCLA's website each year. HCLA will use a standard application form (Attachment) which will be made available in English and other languages upon request. Applications may be completed on HCLA's website or requested by mail, email, or in person. Completed applications may be submitted by mail or hand-delivered to HCLA addresses noted on the application form.

HCLA will maintain a record of all applications received. Upon receipt, each completed application will be assigned a number and logged in with a record of the date and time of receipt, and the name, grade, and contact information of the applicant. All application forms will be maintained in a locked file at the school site. Applicants may contact HCLA to verify receipt of their application.

HCLA relies upon accurate and truthful information on the application forms. If a parent or guardian provides false or incorrect information on the application form, such as an incorrect grade level in order to obtain a better chance of enrollment, the application form will be considered invalid and the student will not be entered into the lottery. The parent/guardian will be notified of HCLA's determination not to enter the application in the lottery.

In a case where an application is submitted, the student is granted admission, and the parent accepts enrollment, and it is subsequently determined that the student is enrolled for the wrong grade through no fault or inaccurate information (e.g., student is retained or double-promoted), a determination shall be made between the parent/ guardian and the Executive Director as to the appropriate placement for the child. The Executive Director has the authority to make the final determination of grade placement. In the case that the appropriate grade placement is not available at the School (e.g., 9th grade), the Executive Director may recommend or require that the parent/guardian withdraw the enrollment application.

### C. Lottery

Applications to HCLA will be accepted until the designated close of the Open Enrollment Period. At that time, should the number of applications for any specific grade level fall below the number of open slots, all applicants will be offered enrollment, and HCLA will continue to accept applications on a rolling basis until all slots are filled. Any applications received after all slots are filled will be added to the waiting list, in the order of the date of receipt.

Should the number of applicants for any specific grade level exceed the number of open slots, per State law, HCLA will schedule a lottery. All applicants will be notified of the date, time, and location of the lottery and have the right to be present.

To prepare for the lottery, HCLA will use the numbered list of applicants created during the enrollment period. To ensure accuracy, an individual other than the person who originally recorded the applications will check the original application forms against the numbered list of applicants to verify that all applications have been documented in the correct order. On the day of the lottery, prior to the drawing, parents/guardians may ask the designated HCLA representative to confirm that their child's name is on the numbered list of applicants.

A corresponding numbered lottery card will be created for each completed application. The lottery will be conducted by an individual who does not have an interest in the outcome. This individual will blindly draw the lottery cards and results will be publicly announced. A second individual will record the numbers and corresponding names as they are drawn. To ensure accuracy, a third individual will review the resulting list as it is created. The drawing will continue until all cards have been drawn. A numbered waiting list for each grade level will be established in the order drawn.

In the case of multiple birth siblings, HCLA shall enter one surname into the lottery to represent all of the multiple birth siblings applying at the same time. If that surname of the multiple birth siblings is selected, then all of the multiple birth siblings shall be admitted.

Every effort will be made to ensure a fair and accurate lottery process. Should HCLA learn of any errors in the lottery process (e.g. inadvertent omission of a student's name from the lottery), appropriate steps will be taken to rectify the situation. This may include re-drawing applicants for the affected grade level.

All applications received after the lottery will be added to the numbered waiting list in the order of the date of receipt. The original applications will be date-stamped and retained in the locked file along with all applications received during the Open Enrollment Period. All applications will be kept until the next Open Enrollment Period.

### D. Written Confirmation of Enrollment

HCLA will notify all applicants of the results of the lottery, and their enrollment or waiting list status. Notice will be provided by mail to the address specified on the enrollment application. Prospective enrollees will be given one week (7 calendar days) to accept or decline the enrollment slot. Written confirmation of the acceptance or declination is required. A declination form is included as Attachment II, and may be provided via fax, mail, or hand-delivered to the specified address. Applicants who are accepting enrollment must complete and submit the Enrollment Packet within the one-week timeframe.

HCLA will make at least three separate documented attempts to contact all individuals who do not submit written confirmation or declination of enrollment. Should an applicant decline enrollment, or fail to submit the required Enrollment Packet by the deadline, the slot will be offered to the next student on the numbered waiting list, and the waiting list will be updated accordingly.

The numbered list will be posted on HCLA's website, so that parents/guardians can verify their student's enrollment status on line. Parents/guardians may also contact the HCLA's designated contact person to determine their child's enrollment status.

### E. Enrollment Packet

The following items must be submitted along with acceptance of enrollment: • Academic Records Request Form • Information on IEP and Section 504 Plan, if applicable • Statement that student has not been expelled or suspended from a public school • Emergency Contact and Procedures Form • Student Medical Information • Student Medication Administration Form • School Directory Information (optional) • Permission for photo and press contact, when applicable

### F. Failure to Enroll or Withdrawal

- Mandatory orientation: HCLA may hold a mandatory orientation for all students prior to the first day of school. HCLA will attempt to contact any student who does not attend orientation to confirm the intent to enroll.
- Failure to Enroll: If a student is absent on the first day of classes, HCLA will make at least one documented attempt to contact the parents/guardians prior to the end of the day. The parent/guardian will be given until the close of the school day to explain the absence and provide any requested documentation. If on day two the student is absent and no reasonable explanation has been provided, the slot may be offered to the next student on the waiting list. The HCLA Executive Director has the authority to determine whether causes for absences are "reasonable". Reasonable absences will generally include illness, death of a family member. Family vacation is not an acceptable reason.
- During the first 20 days of school, any enrollment slots that become available due to student withdrawal or failure to enroll will be offered to the next student on the waiting list.

Students may withdraw from HCLA at any time. Parents/guardians seeking to withdraw their students will be asked to complete a withdrawal form to include the student's name, date of birth, grade, the planned withdrawal date, reason for withdrawal, and plans after withdrawal (including name of transfer school). Upon receipt of written request from the student's new school, HCLA will provide a copy of the student's record in a timely manner.

Students who have withdrawn from HCLA but seek to re-enter may submit an application during the next Open Enrollment Period.

### **G.** Re-Enrollment

Once enrolled at HCLA, scholars are not subject to the lottery for subsequent years. Parents/guardians will be asked to complete re-enrollment packets prior to a specified deadline to secure their student's slot for the upcoming school year, or to submit a formal declination or withdrawal. Failure to submit a re-enrollment packet by the deadline will be taken as a declination, and the slot will be made available

for enrollment during the enrollment period. Prior to releasing a student's slot, HCLA will make at least two documented attempts to contact the parent/guardian.

### **H. Annual Review of Admission Procedures**

The Board of Directors will conduct an annual review of the application, admission, and enrollment procedure to ensure it results in a fair and equitable enrollment process and results in a student body that reflects the diversity of the surrounding community and is committed to the mission and vision of HCLA.

This revised policy was adopted by the Heritage Collegiate Leadership Academy Board of Directors at its meeting on March 20, 2017.

### Heritage Collegiate Leadership Academy-Wake Proposed Sample 2024-25 Operations/Academic Calendar

Date	School Activity
January 2, 2024-August 28, 2024	School Registration and Pre-Enrollment for Grades K-6
July 1-July 31, 2024	School Strategic Planning & PD (School Closed) Recruitment & Hiring
Aug. 1-Aug. 12, 2024	Continued Strategic Planning for 2024-25 Continued Recruitment & Hiring
August 12-23, 2024	All Staff Culture Orientation/PD Training for 2024-25 Academic Year
August 26-28, 2024	Student Orientation/Culture Camp Early Release at 12:30 p.m.
August 29, 2024*	First Day of School for Students—to be synchronized w/ Wake trad. Calendar
September 2, 2024	State Holiday—Labor Day—School Closed
September 12, 2024	Beginning of Grade State ELA Assessment—Grade 3 Only
September 23, 2024	Early Release Day for Students Only
September 27, 2024	Students' 1st Quarter Progress Reports Due
October 5, 2024	Saturday Academy # 1 Focused Projects and Activities
October 9, 2024	Early Release Students Only— P.M. Staff Professional Development
October 23-25, 2024	1st Quarter Benchmark Assessments (ELA & MathScience Grade 5 Only)
October 30, 2024	End of 1st Academic Quarter Early Release for Students Only
October 31, 2024	Optional Professional Workday for Teachers—No School for Students
November 4, 2024	1st Quarter Report Cards Due
November 11, 2024	State Holiday—Veterans Day—School Closed
November 26, 2024,	Early Release Day for Students Only
November 27, 2024	Optional Workday for Teachers - No School for Students
November 28-29, 2024	State Holiday—Thanksgiving Holiday—School Closed
December 5, 2024	Students'2nd Quarter Progress Reports Due
December 6, 2024	Early Release Day for Students Only
December 14, 2024	Saturday Academy # 2 Focused Projects and Activities
December 19, 20224	Early Release for Students and Staff
December 20, 2024	Annual Leave Teachers & Staff—No Students
December 23-26, 2024	Christmas Holiday BreakSchool Closed
December 27-31, 2024	Annual Leave Teachers and Staff—School Closed
·	
January 1, 2025	State Holiday - New Year's Day - School Closed
January 2, 2025	Teachers, Staff and Students Return from Holiday Break
January 15, 2025	State Holiday—MLK Jr. Day—School Closed for staff and Students
January 17, 2025	End of 2nd Academic Quarter
January 24, 2025	Optional Teacher and Staff Workday -No Students  2nd Quarter Benchmark Assessments (ELA & Math, Science 5th Grade Only)
January 28-30, 2025	
February 4, 2025	2nd Academic Quarter Report Cards Due
February 23, 2025	Students'3rd Quarter Progress Reports due
February 22, 2025	Saturday Academy # 3 Focused Projects and Activities
March 12, 2025	Early Release for Students Only—Professional Development Teachers & Staff
March 18-20, 2025	3rd Quarter Benchmarks (ELA, & Math, Science Grade 5 Only)
March 28, 2025	End of 3rd Academic Quarter
March 31, 2025	Early Release for Students Only - Professional Development for Teachers & Staff
April 3, 2025	3rd Quarter Report Cards Due
April 18, 2025	Good Friday, State Holiday—School Closed
April 21-25, 2025	Spring Break for Staff and Students - School Closed (Staff Annual Leave)
May 6, 2025	Students' 4th Quarter Progress Reports Due
May 17 2025	Saturday Academy # 4
May 26, 2025	State Holiday—Memorial Day—School Closed
June 3 - June 6, 2025	State EOG Testing- ELA/ Math Grades 3-6 (Science Grade 5 Only June 6, 2019)
June 10, 2025	End of the Fourth Academic Quarter
June 10, 2025	Student's Final Report Cards /EOY Promotion and Retention Decisions
June 10, 2025*	Last Day of School for Students—Early Release for Students Only
June 11-17, 2025	Mandatory Workdays for Teachers
June 19- June 30, 2025	Summer Academic Camp (Grades 3-6 ELA, Math, Science Grade 5 Retesting)

HCLA's Academic Day Begins at 8:00 a.m. and Ends at 3:30 p.m.

This academic calendar will be synchronized with Wake County Schools Traditional Calendar Approved by the HCLA-Wake Board of Directors on \_\_\_\_\_\_\_.

<b>Board Member</b>	<b>Board Title</b>	<b>County of Resid</b>	le <u>Current</u>	Past or Present	Disciplinary Action taken against
Name	Title	Residence	Occupation	Professional	Any of these professional licenses?
				License Held	
Dr.Kashi Bazemore	<b>Board Chair</b>	Wake	Trad. & CharterTeacher,	Middle School ELA & SS	None
			Trad & Charter School Adm	School Administration	
			Ed. Resercher, Ed. Consultant	Maastery Literacy Specialist	
Dr. Rhonda P. Dunn	Vice Chair	Wake	Teacher, Curr. Specialist, Curr. Co	a Middle School ELA & SS	None
			Ed. Cons., Curr. Coach, Ed. Adm.	School Administration	
Kelly Chesson	Member	Wake	NCCU Institutional Giving	None	None
Dr. James Poole	Member	Wake	Medical Doctor	Pediatrician, M.D.	None
				FASTBRAIIN (ADHD/AUTISM)	
Travis Bond	Member	Wake	Retired Pro. Athlete(NFL/CFL)	None (Seeking)	None
			Peer-to-Peer Counselor	Counselor Certification	
			Athletic Coach		

### Heritage Collegiate Leadership Academy-Wake Sample 2023-24 Operations/Academic Calendar

Date	School Activity
January 3, 2022-May 31, 2023	School Registration and Pre-Enrollment for Grades K-3
July 1-July 28,2023	School Strategic Planning & PD (School Closed) Recruitment & Hiring
July 31-Aug. 12, 2023	Continued Strategic Planning for 2022-23 Continued Recruitment & Hiring
August 7-11 2023	All Staff Culture Orientation/Training for 2022-23 Academic Year
August 14-25, 2023	Student Orientation/Culture Camp Early Release at 12:30 p.m.
August 28, 2023*	First Day of School for Students—to be synchronized w/ Wake County Schools
September 4, 2023	Approved Holiday—Labor Day—School Closed
September 12, 2023	Beginning of Grade State ELA Assessment—Grade 3 Only
September 22, 2023	Early Release Day for Students Only
September 28, 2023	Students' 1st Quarter Progress Reports Due
October 7, 2023	Saturday Academy # 1
October 11, 2023	Early Release Students Only— P.M. Staff Professional Development
October 25-27, 2023	Ist Quarter Benchmark Assessments (1-7 ELA & MathScience Grade 5 Only)
October 27, 2023	End of 1st Academic Quarter Early Release for Students Only
October 31, 2023	Optional Professional Workday for Teachers—No School for Students
November 4, 2023	1st Quarter Report Cards Due
November 13, 2023	State Holiday—Veterans Day—School Closed
November 22, 2023	Early Release Day for Students Only
November 23, 2023	Optional Workday for Teachers - No School for Students
November 23-24, 2023	State Holiday—Thanksgiving Holiday—School Closed
December 5, 2023	Students'2nd Quarter Progress Reports Due
December 6, 2023	Early Release Day for Students Only
December 9, 2023	Saturday Academy # 2
December 19, 2023	Early Release for Students and Staff
December 20, 2023	Annual Leave Teachers & Staff—No Students
December 23-26, 2023	Christmas Holiday BreakSchool Closed
December 27-29, 2023	Annual Leave Teachers and Staff—School Closed
January 1, 2024	State Holiday - New Year's Day - School Closed
January 2, 2024	Annual Leave Teachers and Staff—No Students
January 3, 2024	Teachers, Staff and Students Return from Holiday Break
January 15, 2024	State Holiday—MLK Jr. Day—School Closed for staff and Students
January 18, 2024	End of 2nd Academic Quarter
January 23, 2024	Optional Teacher and Staff Workday -No Students
January 24-26, 2024	2nd Quarter Benchmark Assessments (K-7 ELA & Math, Science 5th Grade Only)
January 30, 2024	2nd Academic Quarter Report Cards Due
February 23, 2024	Students'3rd Quarter Progress Reports due
February 24, 2024	Saturday Academy # 3
February 28, 2024	Early Release for Students Only—Professional Development Teachers & Staff
March 14, 2024	Early Release for Students Only—Professional Development Teachers & Staff
March 19-22, 2024	3rd Quarter Benchmarks (K-7 ELA, & Math, Science Grade 5 Only)
March 27, 2024	End of 3 <sup>rd</sup> Academic Quarter
March 27, 2024	Mandatory Teacher Workday
March 29, 2024	Early Release for Students Only—Professional Development Teachers & Staff
April 3, 2024	3rd Quarter Report Cards Due
April 21, 2024	Good Friday, State Holiday—School Closed
April 22-26, 2024	Spring Break for Staff and Students - School Closed (Staff Annual Leave)
May 6 ,2024	Students' 4th Quarter Progress Reports Due
May 18 2024	Saturday Academy # 4
May 27, 2024	State Holiday—Memorial Day—School Closed
June 3 - June 7, 2024	State EOG Testing- ELA/ Math Grades 3-7 (Science Grade 5 Only June 7, 2019)
June 10, 2024	End of the Fourth Academic Quarter
June 10, 2024	Student's Final Report Cards /EOY Promotion and Retention Decisions
June 10, 2024*	Last Day of School for Students—Early Release for Students Only
June 12-16, 2024	Mandatory Workdays for Teachers
June 19- June 30, 2024	Summer Academic Camp K-2(Grades 3-7 ELA, Math, Science Grade 5 Retesting)
, 17 june 50, 2021	summer reducing samp it equivales of high riden, service didde s retesting)

### **Area of Proposed Coverage**

Comprehensive General Liability
Officers and Directors/Errors and Omissions
Property Insurance
Automobile Liability
Crime Coverage - Minimum/Maximum Amount
Worker's Compensation
Other Coverage
Total Cost

### **Proposed Amount of Coverage**

\$1,000,000.00/occurrence \$1,000,000.00/occurrence

\$1,000,000.00/occurrence \$250,000.00 | \$250,000.00 \$500,000.00

### Cost (Quote)

2,504 4,889 5,700 13,800 332 11,939 2,499 \$41,633

### Heritage Collegiate Leadership Academy Discipline Information

### LEVEL I DISCIPLINARY INFRACTIONS AND RESPONSES

	<u>LEVEL 1:</u>
	s are those infractions that are to be addressed by the teacher or staff member for supervision of the student(s) when the infraction(s) occur.  Disciplinary action, intervention, or prevention shall be optional.
Abusive/Intimidating Language/Gestures	The use of intimidating language, foul language, or gestures that are meant to threaten, harass, harm, embarrass or bully another student
Campus Misconduct	Inappropriate conduct on school property or at a school event, that includes but is not limited to: hallway misconduct, cafeteria misconduct, inappropriate public displays of affection or inappropriate use of personal electronic devices
Classroom Misconduct	Inappropriate conduct during an academic class that includes, but is not limited to: off task behavior, behavior that disrupts the learning environment, general horseplay
Dishonesty	Giving false information to a staff member or teacher; includes academic dishonesty or scholastic dishonesty which includes but is not limited to submitting another's work as one's own, using crib notes on a test, making a false allegation regarding the conduct of another student or committing plagiarism, regardless of means
Inappropriate Dress	Wearing clothes that are unacceptable for school or school sponsored events; appearing at school in a manner that disrupts the learning environment; violation
Inappropriate Use of a Personal Electronic Device	Inappropriate use of a personal electronic device, to include but not limited to: cell phones, MP3 players or video games, that, regardless of means, is disruptive to the classroom or learning environment
Insubordination – Level I	Refusing a reasonable request from a staff member
Unexcused Tardiness	Being late to class or school activities without permission; unaccounted for during portions of a marking period
Unexcused Absence	Being absent from class, designated marking periods or school activities without an excuse

### **Level I and II Discipline Responses:**

- Teach and Re-Teach Expectations
- Verbal Warning
- Parent/Guardian Contact
- Parent/Guardian/Student/ Teacher Conference
- Loss of privileges/participation in extracurricular or schoolsponsored activities
- Loss of Academic Credit (for Plagiarism/Academic Dishonesty)
- School-Based CommunityService
- Classroom Behavior Plan/ Discipline Plan/Attendance Contracts
- Peer Mediation

- Restorative Justice Practices
- Study Hall Assignment
- Time-Out/Improvement Center
- Compensation for Damages
- Confiscation of items or contraband disruptive to the learning environment
- Other school-based alternatives, as established through PBIS alternatives.

Parents/guardians can monitor their student's behavior by using the Parent Portal through Power School. Parent Portal allows access to comprehensive student information throughout the school year. Grades, attendance and discipline, as well as updates from classroom teachers, are easily accessible through Parent Portal. Please contact your student's school to obtain your Parent Portal password.

### LEVEL II DISCIPLINARY INFRACTIONS AND RESPONSES

### **LEVEL II:**

Level II disciplinary infractions are those infractions that are to be addressed by the Principal (or his/her designee). School Based alternatives, suspension by the Principal (or his/her designee), intervention or prevention shall be required.

Further disciplinary action shall be optional\*.

	rather disciplinary decion shall be optional.
Abusive Language with Staff	The use of foul language toward a staff member
Altering School Records	Altering official school records, to include but not limited to: attendance, academic work, academic grades, attendance phone calls
Bullying	Threatening or intimidating behavior, regardless of delivery, aimed at another student or group of students intended to hurt or damage another student or group of students.
Campus Misconduct	Inappropriate conduct on school property or at a school event, to include but not limited to: hallway misconduct, cafeteria misconduct, and/or inappropriate public displays of affection
Continued Level I Infractions	Continued/documented Level I infractions (Similar Level I Disciplinary Infraction)
Defacing School Property	Damage to school property; damage to the appearance of something, especially intentionally
Failure to Complete a Level I or Level II Discipline Assignment	Failure to complete a disciplinary consequence assigned by a staff member for a Level I or Level II behavior violation
Fighting	Physical contact between two or more students that does not result in serious injury or hospitalization
Gambling	Participation in games or activities for the exchange of money or other valuables
Harassment (non – criminal)	Behavior by a student or group of students aimed at tormenting, embarrassing or confusing, by continual persistent attacks, questions, or pestering, another student or group of students
Inadvertent Possession of a Standard Weapon	The inadvertent carrying or possessing of a standard weapon on school grounds, school district property, or at school events
Inappropriate Use of Personal Electronic Device	Inappropriate use of a personal electronic device, to include but not limited to: cell phones, MP3 players, or video games, that, regardless of means, is harmful to other students, staff and/or is detrimental or disruptive to the learning environment
Insubordination – Level II	Insubordination (which constitutes willful disobedience or open and persistent defiance of proper authority)
Physical Mistreatment of Another Student	The physical mistreatment of another student, on school grounds or at school-sponsored events, that does not warrant fighting, bullying, Level III violent acts, or violent acts prohibited by law.
Possession of Fireworks	Possession of fireworks on school property or at school sponsored events
Possession or Distribution of Obscene or Harmful Materials	The possession or distribution of materials, on school grounds or at school-sponsored events, which slanders, defames, harms another or is obscene to the educational environment
School Bus Misconduct	While on district transportation, conduct that is inappropriate or unsafe
Theft	Willfully taking the property of another without permission
Tobacco	The unlawful possession or use of tobacco or nicotine delivery devices on school property or at school sponsored events
Unauthorized Leaving Campus	Leaving school campus in violation of District Closed Campus policy
Unexcused Absences/Truancy	A repetitive pattern of being absent from class or school activities without an excuse
Violation of the Acceptable Use Agreement – Level II	Violation of the District 11 Acceptable Use Agreement. Behaviors include but are not limited to possession or loading of unauthorized software; theft or destruction of technology; altering workstation(s) configuration; or using a District computer to cause harm

<sup>\*</sup>Please see previous page for Level II Discipline Responses.

### LEVEL III DISCIPLINARY INFRACTIONS AND RESPONSES

### LEVEL III:

Level III disciplinary infractions are those infractions that are to be addressed by the Principal (or his/her designee) and for which suspension by the Principal (or his/her designee) shall be mandatory.

Further disciplinary action, including expulsion and involvement of law enforcement, shall be optional.

vel III disciplinary infractions are behaviors considered material and substantial disruptions to the learning environment and will be presumed to be initiated, willful, and overt on the part of the student.

Any Act Prohibited by Federal,	Behavior that violates federal, state, or local law, including but not limited to: false alarms,
State or Local Law	malicious mischief, traffic violations occurring on school property, any type of direct or implied
	threat to secure money or any favor from a fellow student (extortion), use of fireworks,
	initiation of underclass students, hazing or interference with staff and faculty.
Alcohol	The possession, purchase, use, or distribution of substances that contain any amount of alcohol
	on school grounds or during school-sponsored events.
Assault – Third Degree	The commission of an act by a student that would be third degree assault, if committed by an
	adult; when a person knowingly or recklessly causes bodily injury to another person
Continued Level II Infractions	Continued/documented Level II Infractions (Similar Level II Disciplinary Infraction)
Damage to Property	Damage to school property or the personal property of a District employee, on school grounds,
	at school events, or off of school property where the behavior is detrimental to the welfare or
	safety of the school, students, or school personnel
Drug Offense:	The possession, purchase, sale, distribution or use of marijuana or drug paraphernalia on school
Marijuana/ Drug	grounds or during school-sponsored events.
False Allegations Against Staff	The knowingly false allegation of child abuse or misconduct against a district employee
Habitually Disruptive Student	Any student who causes a material and substantial disruption on school grounds, in a school
	vehicle, or at a school activity or sanctioned event three or more time during a school year.
Harassment – Criminal	The harassment of a student or staff member as defined. A pattern of repeated harassment toward another student.
Menacing	Threats against another student that are malignant and hostile; threat with a weapon
Physical Mistreatment	The physical mistreatment of another student, on school grounds or at school-sponsored
of Another Student	events, that does not warrant assault, fighting, or other acts prohibited by law
Pornography	The possession, reproduction, purchase, or transmission of pornography, regardless of means
Violation of the Acceptable	Violation of the District 11 Acceptable Use Agreement. Behaviors include but are not limited to:
Use Agreement – Level III	use of hacker/cracker utilities; possession of personal data without consent; installing audio,
	video, or music servers; or transmitting, accessing, or possessing inappropriate/harmful material
Weapons	The carrying, bringing or possession of a standard weapon or a weapon facsimile on school
Infraction:	grounds or at school sponsored events
Standard	

### Level III Discipline Responses:

- In School Suspension
- Out of School Suspension
- Charges filed with civil authorities
- Loss of privileges/participation in extracurricular or school sponsored activities
- Referral to Central Administration for frequent and habitual
- infractions or, as required by policy
- Development of a Remedial Discipline Plan (RDP)
- Expulsion, transfer, or other alternative
- Parent/guardian conference following suspension for the purpose of discussing reentry, recommendation for transfer, or expulsion
- Compensation for damages replacement

### LEVEL IV DISCIPLINARY INFRACTIONS AND RESPONSES

### **LEVEL IV:**

Level IV disciplinary infractions are those infractions that are to be addressed by the Principal (or his/her designee) and for which suspension by the Principal (or his/her designee) shall be mandatory. Expulsion shall be mandatory. Further disciplinary action, including involvement of law enforcement, where allowed by law, shall be optional.

Level IV disciplinary infractions are behaviors considered material and substantial disruptions to the learning environment and will be presumed to be initiated, willful, and overt on the part of the student.

WIII DE	e presumea to be initiatea, willjul, and overt on the part of the student.
Assault – First or Second Degree	The commission of an act by a student that would be first or second degree assault, if committed by an adult; when one, with intent to cause serious bodily injury to another person, causes serious bodily injury to any person by means of a deadly weapon, or with intent to cause bodily injury to another person, causes such injury to any person by means of a deadly weapon
Firearm	The possession of a firearm, operable or inoperable, on school grounds.  BEHAVIOR INFRACTION WILL RESULT IN MANDATORY EXPULSION.
Drug Offense: Marijuana/Schedule I or II Controlled Substances	The possession, purchase, use, distribution or sale of any amount of a schedule I, II, or III controlled substance on school grounds or during school-sponsored events.
Pornography	The possession, reproduction, purchase, or transmission of child pornography, regardless of means
Possession of Staff Personal Information	Possessing or accessing staff personal information from district resources, regardless of means
Violation of the Acceptable Use Agreement – Level IV	Violation of the Acceptable Use Agreement. Behaviors include but are not limited to: deliberately disabling or circumventing the school's networking device or system, the loading or execution of unauthorized software creating denial of school network resources
Weapons Infraction: Standard with Intent	The carrying, bringing, possession, or use of a standard weapon or a weapon facsimile, on school grounds or at school-sponsored events, with the intent of causing harm or death to a student or staff member
Weapons Infraction: Dangerous	The carrying, bringing or possessing of a dangerous weapon or a firearm on school grounds or at a school-sponsored event

### **Level IV Discipline Responses:**

- Suspension
- Compensation for damages
- Expulsion, transfer, or other alternative placement
- Recommendation of referral for evaluation/services
- Loss of privileges/participation in extracurricular or schoolsponsored activities
- Referral to Central Administration for frequent and habitual infractions ,or as required by policy
- Parent/guardian conference following the expulsion with an appropriate administrator for

### PARENT AND/OR GUARDIAN SIGNATURE SHEET

Please sign and return this form to your child's school. B page, you acknowledge that you have received this Polic child's school.	
The undersigned parent or guardian acknowledges re	ceipt of all items listed above.
Parent or Guardian's Signature	Date
To enable us to properly record that you have returned the information below:	this sheet, please carefully print
Student's Name	Student's Grade

### **Insurance Estimate for**: Heritage Collegiate Leadership Academy

Here's how we suggest you complete the online insurance section of the charter application:

### Civil Liability and Insurance

Area of proposed coverage	Proposed amou	int of coverage	Cost (Quote)
*Comprehensive General Liability	\$1,000	0,000	\$2,504
*Officers and Directors/Errors and Omissions	\$1,000	0,000	\$4,889
*Property Insurance	\$100	,000	\$5,700
*Motor Vehicle Liability	\$1,000	0,000	\$13,800
*Bonding Minimum/Maximum	\$250,000	\$250,000	\$332
*Other	\$1,00	0,000	\$14,438
Total Cost			\$41,633

<sup>\*</sup>Include the "Insurance People" Word document as Appendix P of the application to demonstrate the levels of insurance coverage and projected cost.

Thank you for the opportunity to help start another charter school in N.C.

Steve Griffin Insurance People 1920 Front Street, Suite 750 P.O. Box 3006 Durham, NC 27715-3006

800-825-0442 (Main)

steve@inspeople.com

### KASHI BAZEMORE

7275 Circlebank Drive Raleigh, NC 27615 (984) 220-0493 (cell) doctorkashi.jmteam@gmail.com

### EDUCATION:

North Carolina State University, Raleigh, North Carolina Master of School Administration, May 2003

G.P.A.: 3.94/4.0

North Carolina State University, Raleigh, North Carolina ABD, Ph.D., 2003-2007 G.P.A.: 3.8

### Honors and Activities:

Phi Delta Kappa International, Current Member
UNC-Chapel Hill Leadership Program for Aspiring Principals (LPAP 44), (PEP)
UNC-Chapel Hill Principal's Executive Program (PEP)
The NC Center for School Leadership Development, UNC-CH
21st Century Educator Award, Triangle Urban League (Closing the Gap), 2003
Wake County Division of Principals and Assistant Principals, Instructional
Services Committee
Wake County Assistant Principal Mentoring Program, Past Mentor
Guest Lecturer, NCSU, MSA Program, Topic: NC School Funding: Past, Present, and

The University of North Carolina at Chapel Hill School of Law Juris Doctor, May 1999.

Future Implications of the Leandro Case

East Carolina University, Greenville, North Carolina B.S., Middle Grades Education, Language Arts / Social Studies, May 1995. G.P.A.: 3.7/4.0

# LICENSES and CERTIFICATES:

Executive Director / Mentor / Coach, The John Maxwell Team Social Studies, Grades 6-8, NY State Department of Education Principal, Grades K-12, NC Department of Public Instruction Language Arts, Grades 5-9, NC Department of Public Instruction Social Studies, Grades 5-9, NC Department of Public Instruction Certified Master Literacy Trainer, NCDPI

### **COMMUNITY:**

NC PTA Board Member, Elected
Co-Chair, Resource Development and Partnerships Committee
Federal Legislative Chair, NCPTA / PTA
PTA Vice President, River Bend Middle School, Elected
PTA State Executive Committee on Diversity and Inclusion, Appointed
Leadership Team, NC Families for Testing Reform
NC Association of Educators
Past Trustee, Roanoke-Chowan Community College, Appointed by Governor
Former Board Member, Choanoke Area Development Association (CADA)

# RHONDA P. DUNN

10609 Lake Place, Zebulon, NC 27597 Cell Phone: (919)671-3834

Email: rhopar33@aol.com or rdunn@wcpss.net

# EDUCATION AND CERTIFICATIONS

State of North Carolina Teacher License: Middle Grades Language Arts

Gardner-Webb University
School Administration Add-On Licensure

December 2013

University of Phoenix

2005

Master of Business Administration

June

Saint Augustine's College

December 2002

Bachelor of Science- Organizational Management

# AWARDS AND ACCOLADES

WRAL Teacher of the Week

Teacher of the Year Finalist (Wake County Public School System)

December 2011

2010-2011

Teacher

the

of

Year

(Zebulon

Middle

School)

2010-2011

# PROFESSIONAL EXPERIENCE

Wake County Public Schools

January 2005 – present

Teacher- 8th Grade English/Language Arts

Provide instruction to a diverse group of students. Develop course materials and resources, and engaging teaching strategies. Encourage students to participate in class and group discussions. Monitor students to maintain discipline and promote an atmosphere conducive to learning.

- Communicated within school and home environment to support student learning and wellbeing
- Utilized differentiated instruction to address student needs
- Collaborated with Professional Learning Community team to enhance student learning and success
- Analyze data to drive student instruction and remediation
- Follow Common Core State Standards to ensure all educational goals are met

### **Travis Bond**

109 Chere Helen Dr, Mooresville, NC 28511

919-903-6078 tbond252@gmail.com

### Education

University of North Carolina Chapel Hill Chapel Hill, NC

B.A. in Exercise Sport Administration 2009-2013

# Related College Course Work

Anatomy Kinesiology Emergency First Aid Biology

Personal Health Sports Marketing Sports Economics Biology Lab

Sports Fitness

# Experience and Skills

S&H Youth and Adult services August 2021

- Certified Peer Support Specialist Team Location Supervisor duties consist of a caseload of 80 consumers being assisted by assigned staff to reach their desired goals
- Assist consumer and staff with medical appointments
- Conduct team treatment meetings with consumer and staff

# Mallard Creek High School January 2021

• Offensive Line Coach

# Enterprise 2018-2019

- Greeted and served customers throughout the car rental process
- Completed an average of 4 rental contracts per day and ensured customers

# met qualifications

- Assisted customers daily in rental process and qualifications
- Worked with team in preparing and placing customers in rental cars daily

# CFL (Canadian Football League)

- Edmonton Eskimos 2018-2020
- Winnipeg Blue Bombers 2016-2018

# Kelly O. Chesson

### KECHESSON@GMAIL.COM

252-505-1590

### **Program Excellence Management**

### Outreach Services | Program Development | Program Administration

Community leader with expertise in professional and academic performance improvement strategies. Skilled in navigating alternative career and education options, parent-teacher-student relations, community outreach, event coordination, and program development. Regularly collaborate with diverse groups, including high-profile community members, businesses and charitable organizations to achieve determined objectives. Instrumental in streamlining success while improving pathways, enhancing productivity, and implementing creative solutions.

### PROFESSIONAL EXPERIENCE

# NORTH CAROLINA CENTRAL UNIVERSITY, Durham, NC

03/2020-Present

Stewardship Coordinator

Develop personalized and comprehensive stewardship plans, while implementing campaigns and trainings on stewardship practices across departments to align with university stewardship practices. Actively manage and produce customized financial narrative impact reports for university/foundation endowments and annual scholarships. Maximize the effectiveness of stewardship communications, including building templates using data and file migration to multi-use drivers, and video scripting/production. Manage and interpret data to support smart decision making in segmentation and donor acknowledgement practices through ad hoc database requests to produce personalized stewardship campaigns. Leverage in person and virtual events, campus visits from special guests, and new facilities "Hard Hat" tours as opportunities for donor engagement. Continuous research, communication, and implementation of emerging trends and best practices in donor engagement and stewardship. Implement stewardship for special initiatives and student gratitude campaigns. Support the successful planning and execution of the university's premier events.

### **Key Accomplishments:**

- Built a database to contain various impact videos and donor messages from students to be used globally
- Revised the endowment reports to feature specific scholarship recipients and summary giving graphics

# HERITAGE COLLEGIATE LEADERSHIP ACADEMY, Windsor, NC

03/2018 - 7/2018

ELA Teacher/Grade Level Chair/Counselor

Charter School. Developed and executed daily/weekly lesson plans to ensure student learning aligned with NC Common Core Standards. Administered classroom assessments, NC Check-In, and other interim assessments; and with the support of School Leaders, used data-driven instructional practices. Differentiated teaching and activities for students at all levels to ensure that all students were progressing. Worked with other grade level teachers to encourage interdisciplinary learning. Helped to create a positive learning environment and gain positive rapport with students, parents and staff. Member of school improvement team.

## **Key Accomplishments:**

Grade level proficiency >60% for the entire 6th Grade in NC Reading End of Grade testing.

# WASHINGTON COUNTY SCHOOLS-PLYMOUTH HIGH SCHOOL, Plymouth, NC Career & Technical Education Teacher: Foods I, Foods II, Career Management, 01/2020-03/2020

2016 - 2020

Delivered coursework using hands on instruction, interdisciplinary assignments, and a variety of immersion techniques intended to foster interest, create relevance, and bridge content with standards and other core classes.

### **Key Accomplishments:**

- Foods I &II classes personally invited by the Superintendent to cater the WC Schools District Monthly Principals Meeting
- Foods I & II partnered with HOSA to provide the entire school population with baked desserts during CTE week to encourage free health screenings for students and staff.
- 100% Career and Work Readiness Certification status for all students (24) in Career Management.



Undergraduate: Clemson University

### Medical:

Doctorate of Medicine, Medical University of South Carolina

# Residency:

Pediatrics, William Beaumont Army Medical Center

# Specialty:

Pediatrics

Dr. Jim Poole, founder of FastBraiin and Growing Child Pediatrics, has an affinity for helping those with ADHD find and utilize their strengths. With this passion, he founded FastBraiin, a national program for those with attention, focus, and/or mental health issues such as anxiety and depression. This program has served over 5,000 people of all ages with ADHD and/or medical issues. The integrative approach of FastBraiin has helped over 4,000 students reach the A/B Honor Roll at school and has supported 94% adults in the program in getting to a positive place in life. Since its founding in 1998, Growing Child Pediatrics has been able to serve over 10,000 patients and now boasts seven locations throughout North Carolina.

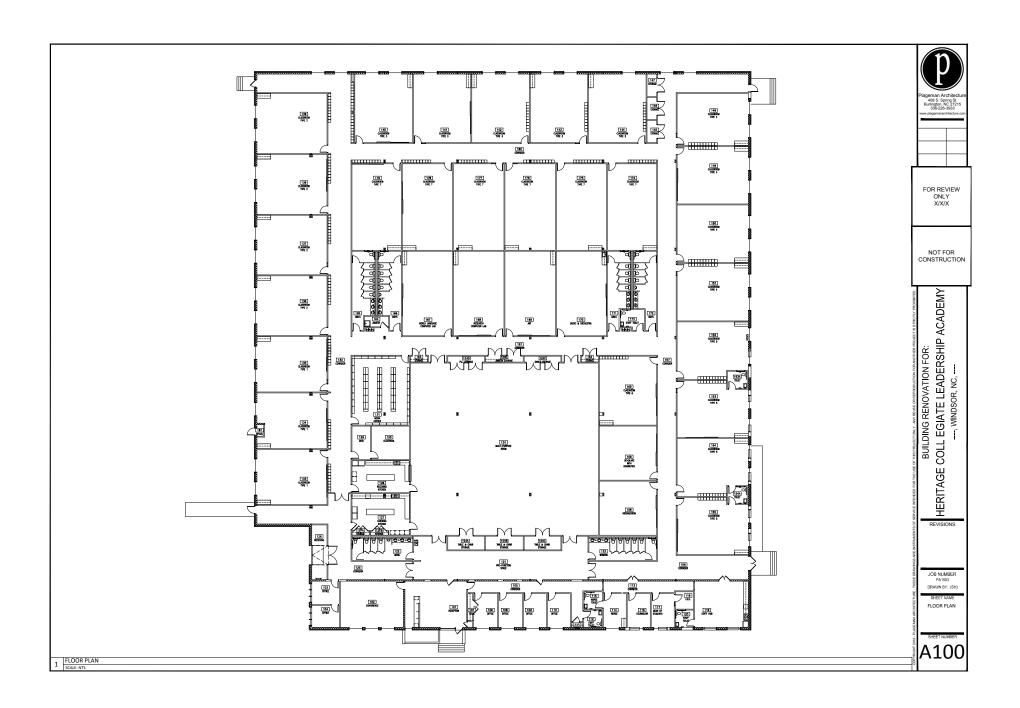
Among his many accomplishments, Dr. Poole has played an integral role in bringing the topic of childcare to the forefront of political conversation by testifying to the US Senate and Senator Kennedy on the state of childcare in the US. As a spokesperson and advocate for higher access to quality childcare, he developed the first 5-star childcare centers in North Carolina and the first sick-child care center. Dr. Poole has also founded Camp Challenge for Children with Asthma in NC and Healthy Child Care America for the American Academy of Pediatrics. As a US Army Meritorious Service Medal recipient, he has served on the Government Task Force for Mental Health. Dr. Poole is also a Rotarian Paul Harris Fellow who co-chairs the National Tribal Conference.

### Heritage Collegiate Leadership Academy - Wake County Access to Curricular Materials and Information

Due to the size of the file, access to all curricular materials is available by clicking the link bel	Due to	the size of the	e file. access	to all curricula	r materials is ava	ailable by	clicking	the link be
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http://www.livebinders.com/play/play?id=2277607 (http://www.livebinders.com/play/play?id=2277607) (http://www.livebinders.com/play/play?id=2277607 (http://www.livebinders.com/play/play?id=2277607))

The access code is HCLA.



#### **Enrollment Projections Year 1 through Year 5**

In the following tables, please list for each year and grade level, the numbers of students that the school reasonably expects to enroll. In addition, please indicate any plans to increase the grade levels offered by the school over time and be sure these figures match those on the initial cover page.

The numbers in the following tables are projections, or estimates, and do not bind the State to fund the school at any particular level.

LEA #1:	920-Wake	What percentage of students from the LEA selected above will qualify for EC funding?	14%
LEA #2:	350-Franklin	What percentage of students from the LEA selected above will qualify for EC funding?	14%
LEA #3:	320-Durham Public	What percentage of students from the LEA selected above will qualify for EC funding?	14%

Grade		Year 1			Year 2			Year 3			Year 4			Year 5	
	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3	LEA #1	LEA #2	LEA #3
_	920	350	320	920	350	320	920	350	320	920	350	320	920	350	320
Kindergarten	62	3	5	62	3	5	62	3	5	62	3	5	62	3	5
Grade 1	55	2	3	55	2	3	55	2	3	55	2	3	55	2	3
Grade 2	55	2	3	55	2	3	55	2	3	55	2	3	55	2	3
Grade 3	55	2	3	55	2	3	55	2	3	55	2	3	55	2	3
Grade 4	55	2	3	55	2	3	55	2	3	55	2	3	55	2	3
Grade 5	55	2	3	55	2	3	55	2	3	55	2	3	55	2	3
Grade 6	62	3	5	62	3	5	62	3	5	62	3	5	62	3	5
Grade 7				70	3	7	70	3	7	70	3	7	70	3	7
Grade 8							70	3	7	70	3	7	70	3	7
Grade 9															
Grade 10															
Grade 11															
Grade 12															
										•		-			
LEA Totals:	399	16	25	469	19	32	539	22	39	539	22	39	539	22	39

For the first two years the State will fund the school up to the maximum projected enrollment for each of those years as set forth and approved in the projected enrollment tables. However, in subsequent years, the school may increase its enrollment only as permitted by NCGS 115C-218.7(b).

#### Budget: Revenue Projections from each LEA Year 1

**State Funds:** Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1st month average daily membership.

In year 1: Base state allotments are determined by the LEA in which the student resides.

In year 2 and Beyond: Base State allotments are determined by the LEA in which the school is located.

**Local Funds:** Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.

**State EC Funds:** Charter schools receive a per pupil share of state funds per student with disabilities (school-aged 5 through 21). Funds are limited to 12.75% of the local education agency's average daily membership (ADM).

Federal EC Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.

#### REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1:			
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$5,844.15	399	\$2,331,815.85
Local Funds	\$3,000.00	399	\$1,197,000.00
State EC Funds	\$4,800.62	51	\$244,219.54
Federal EC Funds	\$1,514.35	51	\$77,038.77
		Total:	\$3,850,074.16

LEA #2:			
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$6,455.07	16	\$103,281.12
Local Funds	\$2,171.70	16	\$34,747.20
State EC Funds	\$4,800.62	2	\$9,793.26
Federal EC Funds	\$1,514.35	2	\$3,089.27
		Total:	\$150,910.86

LEA #3:	320-Durham Public										
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1								
State Funds	\$6,076.39	25	\$151,909.75								
Local Funds	\$4,129.02	25	\$103,225.50								
State EC Funds	\$4,800.62	3	\$15,301.98								
Federal EC Funds	\$1,514.35	3	\$4,826.99								
		Total:	\$275,264.22								

#### **Total Budget: Revenue Projections Year 1 through Year 5**

All per pupil amounts are from the most current information and would be approximations for Year 1.

Federal funding is based upon the number of students enrolled who qualify. The applicant should use caution when relying on federal funding in year one to meet budgetary goals.

These revenue projection figures do NOT guarantee the charter school would receive this amount of funding in Year 1.

For local funding amounts, applicants will need to contact their local offices or LEA.

Income: Revenue Projections	Year 1	Year 2	Year 3	Year 4	Year 5
State ADM Funds	\$ 2,587,007	\$ 3,057,997	\$ 3,528,988	\$ 3,528,988	\$ 3,528,988
Local Per Pupil Funds	\$ 1,334,973	\$ 1,580,391	\$ 1,825,809	\$ 1,825,809	\$ 1,825,809
State EC Funds	\$ 269,315	\$ 318,281	\$ 367,247	\$ 367,247	\$ 367,247
Federal EC Funds	-	\$ 84,955	\$ 115,848	\$ 115,848	\$ 115,848
Other Funds*					
Working Capital*					
TOTAL REVENUE:	\$ 4,191,294	\$ 5,041,624	\$ 5,837,892	\$ 5,837,892	\$ 5,837,892

<sup>\*</sup>All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate additional questions by those evaluating the application. If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.

Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appendix M.

#### Personnel Budget: Expenditure Projections

		Yea	ar 1			Year	2			Year 3			Year 4				Year 5	
Budget Expenditure Projections	Number o	of		Number (	of			Number o	of			Number o	f		Number o	of		
	Staff	Average Salaı	ry Total Salary	Staff	Ave	rage Salary	Total Salary	Staff	Ave	erage Salary	Total Salary	Staff	Average Salary	Total Salary	Staff	Aver	age Salary	Total Salary
Administrative & Support Personnel																		
Lead Administrator	2	\$ 85,00	0 \$ 170,000	2	\$	80,000	\$ 160,000	2	\$	80,000 \$	160,000	2	\$ 80,000 \$	160,000	2	\$	80,000 \$	160,000
Assistant Administrator	0	\$ -	-	0	\$	-	\$ -	0	\$	- \$	-	0	\$ - \$	-	0	\$	- \$	-
Finance Officer	1	\$ 31,00	0 \$ 31,000	1	\$	31,000	\$ 31,000	1	\$	31,000 \$	31,000	1	\$ 31,000 \$	31,000	1	\$	31,000 \$	31,000
Clerical	1	\$ 25,00	0 \$ 25,000	1	\$	25,000	\$ 25,000	1	\$	25,000 \$	25,000	1	\$ 25,000 \$	25,000	1	\$	25,000 \$	25,000
Food Service Staff	1	\$ 25,00	0 \$ 25,000	1	\$	25,000	\$ 25,000	1	\$	25,000 \$	25,000	1	\$ 25,000 \$	25,000	1	\$	25,000 \$	25,000
Custodians	2	\$ 25,00	0 \$ 50,000	2	\$	25,000	\$ 50,000	2	\$	25,000 \$	50,000	2	\$ 25,000 \$	50,000	2	\$	25,000 \$	50,000
Transportation Staff	1	\$ 33,00	0 \$ 33,000	1	\$	33,000	\$ 33,000	1	\$	33,000 \$	33,000	1	\$ 33,000 \$	33,000	1	\$	33,000 \$	33,000
Dean of Teaching and Learning	1	\$ 45,00	0 <b>\$ 45,000</b>	1	\$	45,000	\$ 45,000	1	\$	45,000 \$	45,000	1	\$ 45,000 \$	45,000	1	\$	45,000 \$	45,000
Dean of Students/PBIS/Discipline	1	\$ 35,00	0 \$ 35,000	1	\$	35,000	\$ 35,000	2	\$	35,000 \$	70,000	2	\$ 35,000 \$	70,000	2	\$	35,000 \$	70,000
School Bus Drivers (Part-Time)	9	\$ 18,72	0 <b>\$ 168,480</b>	11	\$	18,720	\$ 205,920	11	\$	18,720 \$	205,920	11	\$ 18,720 \$	205,920	11	\$	18,720 \$	205,920
Child Nutrition Assistants (Part-time)	2	\$ 18,72	0 \$ 37,440	2	\$	18,720	\$ 37,440	2	\$	18,720 \$	37,440	2	\$ 18,720 \$	37,440	2	\$	18,720 \$	37,440
Data Manager	1	\$ 31,00	0 \$ 31,000	1	\$	31,000	\$ 31,000	1	\$	31,000 \$	31,000	1	\$ 31,000 \$	31,000	1	\$	31,000 \$	31,000
Total Admin and Supports	22		\$ 650,920	24			\$ 678,360	25		\$	713,360	25	\$	713,360	25		\$	713,360
Instructional Personnel																		
Core Content Teacher(s)	22	\$ 40,00	0 \$ 880,000	25	\$	40,000	\$ 1,000,000	29	\$	40,000 \$	1,160,000	30	\$ 40,000 \$	1,200,000	30	\$	40,000 \$	1,200,000
Electives/Specialty Teacher(s)	4	\$ 40,00	0 \$ 160,000	4	\$	40,000	\$ 160,000	5	\$	40,000 \$	200,000	5	\$ 40,000 \$	200,000	5	\$	40,000 \$	200,000
Exceptional Children Teacher(s)	2	\$ 40,00	0 \$ 80,000	2	\$	40,000	\$ 80,000	2.8	\$	40,000 \$	112,000	2.8	\$ 40,000 \$	112,000	2.8	\$	40,000 \$	112,000
Instructional Support	2	\$ 25,00	0 \$ 50,000	2	\$	25,000	\$ 50,000	2	\$	25,000 \$	50,000	2	\$ 25,000 \$	50,000	2	\$	25,000 \$	50,000
Teacher Assistants	10	\$ 25,00	0 \$ 250,000	10	\$	25,000	\$ 250,000	10	\$	25,000 \$	250,000	10	\$ 25,000 \$	250,000	10	\$	25,000 \$	250,000
School Counselor	1	\$ 42,00	0 \$ 42,000	1.5	\$	42,000	\$ 63,000	2	\$	42,000 \$	84,000	2	\$ 42,000 \$	84,000	2	\$	42,000 \$	84,000
School Nurse	1	\$ 42,00	0 \$ 42,000	1	\$	42,000	\$ 42,000	1	\$	42,000 \$	42,000	1	\$ 42,000 \$	42,000	1	\$	42,000 \$	42,000
Instructional Coach	1	\$ 42,00	0 \$ 42,000	1	\$	42,000	\$ 42,000	2	\$	42,000 \$	84,000	2	\$ 42,000 \$	84,000	2	\$	42,000 \$	84,000
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Total Instructional Personnel:	43		\$ 1,546,000	46.5			\$ 1,687,000	53.8		\$	1,982,000	54.8	\$	2,022,000	54.8		\$	2,022,000
		_											_			_		
Total Admin, Support and Instructional Personnel	65		\$ 2,196,920	70.5			\$ 2,365,360	78.8		\$	2,695,360	79.8	\$	2,735,360.00	79.8		\$	2,735,360

			Year 1				Year 2				Year	3				Year 4			Ye	ar 5	
Benefits	Number of Staff	Cost	Per	Total	Number of Staff	f Cost	: Per	Total	Number of Staff	f C	ost Per		Total	Number o	of C	ost Per	Total	Number of Staff	Cost Per		Total
Administrative & Support Benefits	O.G.II				- Juli				J.u.i.									<b>-</b>			
Health Insurance	11	\$	2,400	\$ 26,400	11	\$	2,400 \$	26,400	11	\$	2,400	\$	26,400	11	\$	2,400 \$	26,400	11	\$ 2,40	00 \$	26,400
Retirement PlanNC State	0	\$	-	\$ -	0	\$	- \$	-	0	\$	-	\$	-	0	\$	- \$	-	0	\$ -	•	-
Retirement PlanOther	11	\$	3,600	\$ 39,600	11	\$	3,600 \$	39,600	11	\$	3,600	\$	39,600	11	\$	3,600 \$	39,600	11	\$ 3,60	0 \$	39,600
Life Insurance	0	\$	-	\$ -	0	\$	- \$	-	0	\$	-	\$	-	0	\$	- \$	-	0	\$ -	\$	-
Disability	0	\$	-	\$ -	0	\$	- \$	-	0	\$	-	\$	-	0	\$	- \$	-	0	\$ -	\$	-
Medicare	22	\$	430	\$ 9,460	22	\$	430 \$	9,460	22	\$	430	\$	9,460	22	\$	430 \$	9,460	22	\$ 43	80 \$	9,460
Social Security	22	\$	1,860	\$ 40,920	22	\$	1,860 \$	40,920	22	\$	1,860		40,920	22	\$	1,860 \$	40,920	22	\$ 1,86		40,920
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Total Admin and Support Benefits:				\$ 116,380		<u>I</u>	\$	116,380				\$	116,380			\$	116,380			\$	116,380
			<u>_</u>	, ,,,,,,			<u> </u>	.,	1		l	,	-,				-,			•	.,
Instructional Personnel Benefits																					
Health Insurance	43	\$	2,400	\$ 103,200	46.5	\$	2,400 \$	111,600	53.8	\$	2,400	\$	129,120	54.8	\$	2,400 \$	131,520	54.8	\$ 2,40	0 \$	131,520
Retirement PlanNC State	0	\$	-	\$ -		1	\$		0	\$	-	\$		0	\$	- <b>\$</b>		0	\$ -	\$	
Retirement PlanOther	43	\$	3,600	\$ 154,800	46.5	\$	3,600 \$	167,400	53.8	\$	3,600	\$	193,680	54.8	\$	3,600 \$	197,280	54.8	\$ 3,60	0 \$	197,280
Social Security	43	\$	2,229	\$ 95,847	46.5	\$	2,229 \$	103,649	53.8	\$	2,229	\$	119,920	54.8	\$	2,229 \$	122,149	54.8	\$ 2,22		122,149
Disability	0	\$	-	\$ -			\$	-	0	\$	-	\$	-	0	\$	- \$	-	0	\$ -	•	-
Medicare	43	\$	522	\$ 22,446	46.5	\$	522 \$	24,273	53.8	\$	522	\$	28,084	54.8	\$	522 \$	28,606	54.8	\$ 52	22 \$	28,606
Life Insurance	0	\$	-	\$ -			\$	-				\$	-			\$	-			\$	-
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Total Instructional Personnel Benefits:				\$ 376,293		<u>I</u>	\$	406,922				\$	470,804			\$	479,555			\$	479,555
							<u> </u>	- 3 - ,	1		<u>[</u>					_ +				Ť	3,000
Total Personnel Benefits:	:		Γ	\$ 492,673			\$	523,302	]		[	\$	587,184			\$	595,935			\$	595,935
							l	<u> </u>								<u> </u>	·				
Total Admin & Support Personnel (Salary & Benefits):	22			\$ 767,300	24		\$	794,740	25			\$	829,740	25		\$	829,740.00	25		\$	829,740
			_					•			<u>I</u>				_		L.		ı		
Total Instructional Personnel (Salary & Benefits):	43	1		\$ 1,922,293	46.5	7	\$	2,093,922	53.8		[	\$	2,452,804	54.8		\$	2,501,555	54.8		\$	2,501,555
						•	l									<u> </u>				•	
TOTAL PERSONNEL:	65			\$ 2,689,593	70.5		\$	2,888,662	78.8			\$	3,282,544	79.8		\$	3,331,295	79.8		\$	3,331,295
		•				•				-						-					

<sup>\*</sup>The personnel list below may be amended to meet the staffing of individual charter schools: This list should align with the projected staff located in the Operations Plan.

#### **Operations Budget: Expenditure Projections**

The following list of expenditure items is presented as an example. Applicants should modify to meet their needs.

OPERATIONS BUDGET: Administrative and Support	Year 1		Year 2		Year 3		Year 4		Year 5
Office									
Office Supplies	\$ 20,000.00	\$	29,000.00	\$	30,000.00	\$	30,000.00	\$	30,000.00
Paper	\$ 1,200.00	\$	1,700.00	\$	2,000.00	\$	2,000.00	\$	2,000.00
Computers & Software	\$ 96,000.00	\$	109,000.00	\$	109,000.00	\$	109,000.00	\$	109,000.00
Communications & Office/Cell Phones	\$ 24,000.00	\$	34,000.00	\$	38,000.00	\$	38,000.00	\$	38,000.00
Copier leases	\$ 32,000.00	\$	33,000.00	\$	33,000.00	\$	33,000.00	\$	33,000.00
Website Construction & Maintenance	\$ 20,000.00	\$	20,000.00	\$	20,000.00	\$	20,000.00	\$	20,000.00
Furniture Classrooms and Offices	\$ 27,000.00	\$	35,000.00	\$	35,000.00	\$	35,000.00	\$	35,000.00
Management Company									
Contract Fees	\$ -	\$	-	\$	-	\$	-	\$	-
Contract Internet setup	\$ 23,000.00	\$	17,000.00	\$	17,000.00	\$	17,000.00	\$	17,000.00
Internet WiFi Monthly Maintenance	\$ 22,000.00	\$	26,000.00	\$	26,000.00	\$	26,000.00	\$	26,000.00
Professional Contract									
Legal Counsel	\$ 30,000.00	\$	35,000.00	\$	40,000.00	\$	40,000.00	\$	40,000.00
Student Accounting	\$ 5,000.00	\$	15,000.00	\$	20,000.00	\$	20,000.00	\$	20,000.00
Financial	\$ 48,000.00	\$	48,000.00	\$	49,000.00	\$	50,000.00	\$	50,000.00
Builder/Designer/Developer Services	\$ 47,000.00	\$	45,000.00	\$	45,000.00	\$	45,000.00	\$	45,000.00
Financial Audit	\$ 10,000.00	\$	10,000.00	\$	10,000.00	\$	10,000.00	\$	10,000.00
Facilities									
Facility Lease/Mortgage/Development	\$ 500,000.00	\$	500,000.00	\$	500,000.00	\$	500,000.00	\$	500,000.00
Maintenance	\$ 3,600.00	\$	5,800.00	\$	6,000.00	\$	6,500.00	\$	7,000.00
Custodial Supplies	\$ 14,000.00		14,000.00	\$	15,000.00	\$	16,000.00	\$	17,000.00
Custodial Contract	\$ -	\$	-	\$	-	\$	-	\$	-
Insurance (pg19)	\$ 41,000.00	\$	41,000.00	\$	41,000.00	\$	41,000.00	\$	41,000.00
Vehicle Registrations	\$ 1,500.00		2,000.00		2,500.00	\$	2,500.00		2,500.00
*** Insert rows and edit text as needed. ***									
Utilities									
Electric	\$ 30,000.00	\$	36,000.00	\$	37,000.00	\$	38,000.00	\$	39,000.00
Gas	\$ -	\$	-	Ψ	37,000.00	Ψ	30,000.00	Ψ	33,000.00
Water/Sewer	\$ 2,000.00		3,000.00	\$	3,500.00	\$	4,000.00	\$	4,500.00
Trash	\$ 15,500.00	,	16,000.00		17,000.00		18,000.00		19,000.00
114011	\$ -	Ψ	10,000.00	Ψ	17,000.00	Ψ	10,000.00	Ψ	10,000.00
	\$ -								
	\$ -								
Transportation									
Buses	\$ 35,000.00		30,000.00		30,000.00		30,000.00		30,000.00
Deisel Fuel/Gas	\$ 37,500.00		40,000.00		45,000.00	\$	45,000.00		45,000.00
Oil/Tires & Maintenance	\$ 12,000.00	_	25,000.00		25,000.00	H	25,000.00		25,000.00
Bus Mechanic Contract	\$ 27,000.00		29,000.00	\$	30,000.00	\$	30,000.00		30,000.00
Activity Buses	\$ 18,000.00		7,500.00	\$	7,500.00	\$	7,500.00		7,500.00
Short Bus Other	\$ 12,000.00	\$	12,000.00	\$	12,000.00	\$	6,000.00	\$	12,000.00
Marketing	\$ 15,000.00	\$	15,000.00	\$	15,000.00	\$	15,000.00	\$	15,000.00
Child Nutrition Setup and Maintenance	\$ 45,000.00	\$	45,000.00	\$	45,000.00	\$	45,000.00	\$	65,000.00
Travel	\$ 5,000.00	\$	5,000.00	\$	7,000.00	\$	7,000.00	\$	7,500.00
Child Nutrition Food Contract	\$ 21,000.00	\$	25,000.00	\$	40,000.00	\$	45,000.00	\$	50,000.00
12 Passengers Van- Training Travel	\$ -	\$	25,000.00	\$	25,000.00				
						I			

OPERATIONS BUDGET: Instructional	Year 1	Year 2	Year 3	Year 4	Year 5
Classroom Technology					
Instructional Software IXL & Other	\$ 18,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00
Microsoft Office 365	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00
Khan Academy Training Only	\$ 700.00	\$ 700.00	\$ 700.00	\$ 700.00	\$ 700.00
Instructional Contract					
Prof. Dev. Teach like a Champion 3.0	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
Professionl Development AVID	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00
Critical Thinking Training	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
Professional Training PBIS	\$ 950.00	\$ 950.00	\$ 950.00	\$ 950.00	\$ 950.00
Books and Supplies					
Instructional Materials	\$ 13,000.00	\$ 14,000.00	\$ 15,000.00	\$ 16,000.00	\$ 17,000.00
Curriculum/Texts	\$ 4,800.00	\$ 5,000.00	\$ 6,000.00	\$ 7,000.00	\$ 8,000.00
Copy Paper	\$ 4,000.00	\$ 5,000.00	\$ 6,000.00	\$ 7,000.00	\$ 8,000.00
Testing Supplies	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00
HCLA Student Planners	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00	\$ 7,000.00
Teach Like a Champion 3.0 Text & Guide	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Total Instructional Operations:	\$ 118,450.00	\$ 117,650.00	\$ 120,650.00	\$ 123,650.00	\$ 126,650.00
TOTAL OPERATIONS:	\$ 1,358,750.00	\$ 1,451,650.00	\$ 1,498,150.00	\$ 1,480,150.00	\$ 1,518,650.00

<sup>\*</sup>Applicants may amend this table and the position titles to fit their Education and Operations Plans.

#### Overall Budget

SUMMARY	Logic	Year 1	Year 2	Year 3	Year 4	Year 5
Total Personnel	J	\$ 2,689,593.00	\$ 2,888,661.50	\$ 3,282,543.80	\$ 3,331,294.80	\$ 3,331,294.80
Total Operations	M	\$ 1,358,750.00	\$ 1,451,650.00	\$ 1,498,150.00	\$ 1,480,150.00	\$ 1,518,650.00
Total Expenditures	N = J + M	\$ 4,048,343.00	\$ 4,340,311.50	\$ 4,780,693.80	\$ 4,811,444.80	\$ 4,849,944.80
Total Revenue	Z	\$ 4,191,294.20	\$ 5,041,624.24	\$ 5,837,891.99	\$ 5,837,891.99	\$ 5,837,891.99
Surplus / (Deficit)	= Z - N	\$ 142,951.20	\$ 701,312.74	\$ 1,057,198.19	\$ 1,026,447.19	\$ 987,947.19

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	K-6	440
Year 2	K-7	520
Year 3	K-8	600
Year 4	K-8	600
Year 5	K-8	600

#### Question 33:

#### Heritage Collegiate Leadership Academy of Wake County Facility Hunt for 2023-24

The planning Board and team for the HCLA-Wake charter school have identified several facilities that are appropriate to set up a school operation in August 2023. Most are in the 27616, 27604, and the 27615 ZIP Codes. A photo of the "For Lease" signs and/or the building will be attached to this question as evidence that these facilities are indeed available at this time and since many of them have been available for quite some time, it is expected that they will still be available for negotiations once the HCLA-Wake application is approved by CSAB.

# State Board of Education | Department of Public Instruction

# **Charter School Required Signature Certification**

Note: Outlined below is a list of areas that must be certified by the proposed Board of Directors. Any forms Not Applicable to the proposed charter school indicate below with N/A and provide a brief explanation for providing such response.

Serving on a public charter school board is a position of public trust and board members of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, the school's fulfillment of its public obligations, all terms of its charter, and understanding/overseeing all third-party contracts with individuals or companies.

	0	Date of Review:
		04/23/22
		Signature of Board Members Present (Add Signature Lines as Needed):    Constitution of Partie
*	The se	lected Board Auditor that he/she has reviewed with the full Board of Directors, list
		the first pour of processing the pro
	within	the application, all the items required for the annual audit and 990 preparations.
		the application, all the items required for the annual audit and 990 preparations. Name of the Selected Board Auditor: Petway, Mills, and
		the application, all the items required for the annual audit and 990 preparations.  Name of the Selected Board Auditor: Petway, Mills, and  Pearson
		the application, all the items required for the annual audit and 990 preparations.  Name of the Selected Board Auditor: Petway, Mills, and  Pearson  Date of Review:
	0	the application, all the items required for the annual audit and 990 preparations.  Name of the Selected Board Auditor: Petway, Mills, and  Pearson

CIIC	ontracting with a CMO/EMO, that the selected management company has reviewed with full Board of Directors, listed within the application, all the items required and the sciated management contract and operations.
	Name of the Contact for Selected EMO/CMO:     N/A
	o Date of Review:
	Signature of Board Members Present (Add Signature Lines as Needed):
	DocuSigned by:  703109A554B5420
	Ruonda Partin Dunn OFEETSES4827408
	Letty (tussou
	ADB2D77SD84F4FF_
* If co	ntracting with a financial management service provider that the selected financial
all th	ce provider has reviewed with the full Board of Directors, listed within the application, e financial processes and services provided.
C	Name of the Contact: Jean Jones
0	Name of the Selected Financial Service Provider:
	Padgett Business Services of Greenville  Date of Review:
	4/23/22
0	Signature of Board Members Present (Add Signature Lines as Needed):
	DocuSigned by:
	Resorda Parlin Dunch
	Eelly Usson
	-ADBZD778D84F4F
servic	proposed Board of Directors, listed within the application, is contracting with a e provider to operate PowerSchool that the service provider has reviewed all of the
Iinanc	ial processes and services provided.
0	Name of the Contact: HCLA Data Manager
0	Name of the Selected PowerSchool Service Provider: HCLA Data Manager
0	Date of Review:
	4/23/22
	Signature of Doord March
	Signature of Board Members Present (Add Signature Lines as Needed):
	TOS (DIAGRABIA)20_
	Rubida Partin Durn
	Elly Chusson ADB2D776DB4F4FF

I, Dr. Kashi Bazemore  Member has reviewed and participated in	, as Board Chair, certify that each Board in the selection of the individuals and vendors attached to
this document as evidenced by the full I information I am providing to the North	Board of Director signatures outlined above. The
Heritage Collegiate Leadership Academy	Charter School is true and correct in every respect.
Signature Signature 753109A554B5420	

Date 4/28/2022

Racial/Ethnic	Disadvantaged	% of Students with Disabilities	% of English Language Learners
Sheet 2	40%	14%	10.50%

#### **Anticpated Racial/Ethnic**

<u>Demographics</u>	Percent
Black/African American	45
Hispanic/Latino	30
White	10
Asian	5
Mixed Race	5
Other	5
Total	100
lUldi	100

Note: To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

# Background

- 1. Name of charter school on whose Board of Directors you intend to serve: Heritage Collegiate Leadership Academy
- 2. Full Name: Travis Bond

109 Chere Helen Drive, Mooresville, NC 28511 Home Address:

contracted peer-to-peer counselor, Coach/trainer Business Name and Address:

(919)903-6078Telephone No.:

tbond252@gmail.com E-mail address:

3. Brief educational and employment history.

UNC Chapel Hill alum

Coaching Clinics

NC Peer Counseling Training and Certification

Retired Professional Athlete

Athletic Director experience

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

Yes: No:

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

THE PARTY OF THE PROPERTY OF THE PARTY OF TH

I volunteered because I believe in the mission of HCLA. I am from Bertie County and saw firsthand the good things that HCLA was doing in my hometown.

- 6. What is your understanding of the appropriate role of a public charter school board member? I have been trained on my role, and I know we do the oversight for the school,
- 7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have a working knowledge on board governance. I have served on this board for 2 years.

8. Describe the specific knowledge and experience that you would bring to the board.

Counseling, Coaching, Athletics, Fundraising

# School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

HCLA is a college prep school that is positioned to improve the lives of the scholars we serve and the community at the same time.

2. What is your understanding of the school's proposed educational program?

I understand the AVID college prep program and the NC Standard Course of Study.

3. What do you believe to be the characteristics of a successful school?

A successful school has a rigorous and engaging curriculum, a positive culture and extracurricular experiences for students.

4. How will you know that the school is succeeding (or not) in its mission?

The goals and objectives of the school's strategic plan, when evaluated, determine whether a school is successful.

#### <u>Governance</u>

1. Describe the role that the board will play in the school's operation.

The board is primarily responsible for policy development, budget and general oversight.

2. How will you know if the school is successful at the end of the first year of operation?

We will know we are successful if we are on the black, are fully enrolled, retain the majority of our staff, and have engaged and happy parents.

3. How will you know at the end of five years of the schools is successful?

Teacher and student retention are a major consideration. A strong fiscal operation, and a positive relationship in the community. Institutional and corporate partnerships that yield donors, internships, and other innovative opportunities to students, families and staff.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Program evaluation and working with OCS / NCDPI staff will be critical steps.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
I would formally address my concerns with the board.

\*Please include the following with your Information Form

• a one page resume

*If you responded within the application that disciplinary action has been taken against any past
or present professional licenses, provide a detailed response below outlining the disciplinary
action taken and the license validity. Click or tap here to enter text.
Certification  I Travis Bond  certify to the best of my knowledge and
I,, certify to the best of my knowledge and
ability that the information I am providing to the North Carolina State Board of Education as a
prospective board member for Heritage Collegiate Leaders Charcad School is true and correct
in every respect.
Travis Bond
EEUDF465B13E4A3
Signature
Signature Date 4/26/2022

**Note:** To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.

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# Background

- 1. Name of charter school on whose Board of Directors you intend to serve: Heritage Collegiate Leadership Academy
- 2. Full Name:

Dr. Rhonda Dunn

Home Address: 10609 Lake Place, Zebulon, NC 27597

Business Name and Address: Education Consultant, same address

Telephone No.: (919) 671-3834 E-mail address: rhopar33@aol.com

Brief educational and employment history.
 St. Augustine University, BS, Organizational Management
 MBA, University of Phoenix
 School Admin Add-on License/ Ed.D., Gardner Webb University

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

No: Yes: X

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

I volunteered because I believe in the mission of HCLA. I consulted with the school In Bertie County.

- 6. What is your understanding of the appropriate role of a public charter school board member? I feel very comfortable in this role given my background experience and training.
- 7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I am a member of a sorority and have served on multiple boards.

8. Describe the specific knowledge and experience that you would bring to the board. Business management, curriculum design and development, professional development

### School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

HCLA is a college prep school that is positioned to improve the lives of the scholars we serve and the community at the same time.

2. What is your understanding of the school's proposed educational program?

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### Governance

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3. How will you know at the end of five years of the schools is successful?

Teacher and student retention are major considerations. A strong fiscal operation, and a positive relationship in the community. Institutional and corporate partnerships

that yield donors, internships, and other innovative opportunities to students, families and staff.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Staff and Program evaluation and working with OCS / NCDPI staff will be critical steps.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
I would formally address my concerns with the board.

\*Please include the following with your Information Form

• a one page resume

*If you responded within the application that di or present professional licenses, provide a detail	sciplinary action has been taken against any past led response below outlining the disciplinary
action taken and the license validity. Click or ta	p here to enter text.
Certification I, Dr. Rhonda Dunn	, certify to the best of my knowledge and
ability that the information I am providing to the prospective board member for Heritage Colle	e North Carolina State Board of Education as a giate Leadership Academyool is true and correct
in every respect.	
Dr. Khonda Dunn	
—0FEE73E3482740B	
Signature	
Date 4/26/2022	

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- 2. Full Name:

Dr. Rhonda Dunn

Home Address: 10609 Lake Place, Zebulon, NC 27597

Business Name and Address: Education Consultant, same address

Telephone No.:

(919) 671-3834

E-mail address:

rhopar33@aol.com

3. Brief educational and employment history.

St. Augustine University, BS, Organizational Management

MBA, University of Phoenix

School Admin Add-on License/ Ed.D., Gardner Webb University

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

No:

Yes: X

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

I volunteered because I believe in the mission of HCLA. I consulted with the school In Bertie County.

- 6. What is your understanding of the appropriate role of a public charter school board member? I feel very comfortable in this role given my background experience and training.
- 7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I am a member of a sorority and have served on multiple boards.

Describe the specific knowledge and experience that you would bring to the board.
 Business management, curriculum design and development, professional development

### School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

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2. What is your understanding of the school's proposed educational program?

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\*Please include the following with your Information Form

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or present professional licenses, provide a detail	
action taken and the license validity. Click or taken	o here to enter text.
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Dr. Khonda Dunn	
—0FEE73E3482740B	
Signature Date 4/26/2022	

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### Background

- 1. Name of charter school on whose Board of Directors you intend to serve: Heritage Collegiate Leadership Academy
- 2. Full Name: Kelly Chesson

5625 Grand Traverse Dr Home Address:

Raleigh, NC 27604

NC Central University, Durham, NC Business Name and Address:

+1 (252) 505-1590 Telephone No.: kechesson@gmail.com E-mail address:

3. Brief educational and employment history.

**UNC Chapel Hill alum** 

ECSU MSA program

NCCU MPA program

Public education (5-9, English/History, Workforce Development, Institutional Giving/Finance, Entrepreneur

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

Yes: X No:

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

I volunteered because I believe in the mission of HCLA.

- 6. What is your understanding of the appropriate role of a public charter school board member? I have been trained on my role. I understand that the Board is the governing body with the fiduciary and oversight duties to the State Board of Education and the taxpayers of NC.
- 7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I am a member of a fraternity and have served in various governance capacities. I'm an entrepreneur, and I understand fiscal management and fundraising.

8. Describe the specific knowledge and experience that you would bring to the board.

Business finance and institutional giving.

### School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

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#### Governance

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4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Program evaluation and working with OCS / NCDPI staff will be critical steps.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

I would formally address my concerns with the board.

\*Please include the following with your Information Form

• a one page resume

*If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary
action taken and the license validity. Click or tap here to enter text.
Certification  I,
ability that the information I am providing to the North Carolina State Board of Education as a
prospective board member for Heritage Collegiate Leaders Charles Charles Collegiate Leaders Charles Collegiate Leaders Charles Collegiate Leaders
in every respect.
kelly Chesson
ADB2D775DB4F4FF
Signature
Date 4/28/2022

0.91

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### Background

- 1. Name of charter school on whose Board of Directors you intend to serve: Heritage Collegiate Leadership Academy
- 2. Full Name:

Dr. Kashi Bazemore

Home Address: 7275 Circlebank Drive, Raleigh, NC 27615

Business Name and Address: Added Education Solutions, LLC

Telephone No.: (919) 376-5887

E-mail address: doctorkashi.jmteam@gmail.com

3. Brief educational and employment history.

**UNC Chapel Hill School of Law** 

NCSU, PhD program, Educational Research and Policy Analysis

MSA, NCSU

BS, Middle Grades Education, ECU

Nonprofit Leadership Certificate, Duke University

Taught and led public schools in the public traditional, Magnet and charter school sectors in NYC and NC

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

No: Yes: X

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

I serve because the original vision for HCLA was mine.

- 6. What is your understanding of the appropriate role of a public charter school board member? I feel very prepared for this role due to my training, volunteer, and work experiences.
- 7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I am a member of a sorority and Rotary International and have servedon numerous boards. I'm an entrepreneur and pursuing my federal business certification. I'm also pursing my law license for NC.

8. Describe the specific knowledge and experience that you would bring to the board.
Business finance, law, Policy development, community outreach, curriculum development, real estate, contract negotiations

### School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

HCLA is a college prep school that is positioned to improve the lives of the scholars we serve and the community at the same time.

2. What is your understanding of the school's proposed educational program?

I understand the AVID college prep program and the NC Standard Course of Study.

3. What do you believe to be the characteristics of a successful school?

A successful school has a rigorous and engaging curriculum, a positive culture and extracurricular experiences for students.

4. How will you know that the school is succeeding (or not) in its mission?

The goals and objectives of the school's strategic plan, when evaluated, determine whether a school is successful.

### Governance

1. Describe the role that the board will play in the school's operation.

The board is primarily responsible for policy development, budget and general oversight.

2. How will you know if the school is successful at the end of the first year of operation?

We will know we are successful if we are on the blank, are fully enrolled, retain the majority of our staff, and have engaged and happy parents.

- 3. How will you know at the end of five years of the schools is successful?

  Teacher and student retention are a major consideration. A strong fiscal operation, and a positive relationship in the community. Institutional and corporate partnerships that yield donors, internships, and other innovative opportunities to students, families and staff.
- 4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Program evaluation and working with OCS / NCDPI staff will be critical steps.

- 5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

  I would formally address my concerns with the board.
- \*Please include the following with your Information Form
  - a *one page* resume

*If you responded within the application that disciplinary action has been taken against any past
or present professional licenses, provide a detailed response below outlining the disciplinary
action taken and the license validity. Click or tap here to enter text
Certification //
Certification $BaZemore$ , certify to the best of my knowledge and
ability that the information I am providing to the North Carolina State Board of Education as a
ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Her, ha ge to layak Leadys Charter School is true and correct
in every respect.
Lath See
Signature
Date $4/22/22$

**Note:** To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

### Background

- Name of charter school on whose Board of Directors you intend to serve: Heritage Collegiate Leadership Academy
- 2. Full Name:

Dr. Kashi Bazemore

Home Address: 7275 Circlebank Drive, Raleigh, NC 27615

Business Name and Address: Added Education Solutions, LLC

Telephone No.: (919) 376-5887

E-mail address: doctorkashi.jmteam@gmail.com

3. Brief educational and employment history.

UNC Chapel Hill School of Law

NCSU, PhD program, Educational Research and Policy Analysis

MSA, NCSU

BS, Middle Grades Education, ECU

Nonprofit Leadership Certificate, Duke University

Taught and led public schools in the public traditional, Magnet and charter school sectors in NYC and NC

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

No: Yes: X

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

I serve because the original vision for HCLA was mine.

- 6. What is your understanding of the appropriate role of a public charter school board member? I feel very prepared for this role due to my training, volunteer, and work experiences.
- 7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I am a member of a sorority and Rotary International and have servedon numerous boards. I'm an entrepreneur and pursuing my federal business certification. I'm also pursing my law license for NC.

8. Describe the specific knowledge and experience that you would bring to the board.
Business finance, law, Policy development, community outreach, curriculum development, real estate, contract negotiations

# School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

HCLA is a college prep school that is positioned to improve the lives of the scholars we serve and the community at the same time.

2. What is your understanding of the school's proposed educational program?

I understand the AVID college prep program and the NC Standard Course of Study.

3. What do you believe to be the characteristics of a successful school?

A successful school has a rigorous and engaging curriculum, a positive culture and extracurricular experiences for students.

4. How will you know that the school is succeeding (or not) in its mission?

The goals and objectives of the school's strategic plan, when evaluated, determine whether a school is successful.

## Governance

1. Describe the role that the board will play in the school's operation.

The board is primarily responsible for policy development, budget and general oversight.

2. How will you know if the school is successful at the end of the first year of operation?

We will know we are successful if we are on the blank, are fully enrolled, retain the majority of our staff, and have engaged and happy parents.

- 3. How will you know at the end of five years of the schools is successful?

  Teacher and student retention are a major consideration. A strong fiscal operation, and a positive relationship in the community. Institutional and corporate partnerships that yield donors, internships, and other innovative opportunities to students, families and staff.
- 4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Program evaluation and working with OCS / NCDPI staff will be critical steps.

- 5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

  I would formally address my concerns with the board.
- \*Please include the following with your Information Form
  - a one page resume

*If you responded within the application that disciplinary action has been taken against any past
or present professional licenses, provide a detailed response below outlining the disciplinary
action taken and the license validity. Click or tap here to enter text
Certification /
Certification $Rash Bazemore$ , certify to the best of my knowledge and
ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Her, tage to layak Leady Charter School is true and correct
prospective board member for Hev, Lage to Mayak Leadys Charter School is true and correct
in every respect.
and Del
Signature
Date 4/22/22

## Charter School Board Member Information Form

**Note:** To be completed individually by each proposed founding charter school board member. All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

# Background

- 1. Name of charter school on whose Board of Directors you intend to serve: Heritage Collegiate Leadership Academy
- 2. Full Name:

Dr. James M. Poole, MD

Home Address: 5625 Grand Traverse Dr

Raleigh, NC 27604

Business Name and Address: FastBraiin, 260 Horizon Drive, Raleigh, NC 27615

Telephone No.: (919) 880-3679

E-mail address: Fstbraiin@gmail.com

3. Brief educational and employment history.

Clemson University

Medical School

**Growing Child Pediatrics Founder** 

FastBraiin Founder

4. Have you previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation?

No: Yes: X

5. How were you recruited to join this Board of Directors? Why do you wish to serve on the board of the proposed charter school?

I had the pleasure to work with the teachers, staff, students and leaders of HCLA to support students with ADHD and Autism.

- 6. What is your understanding of the appropriate role of a public charter school board member? I have been in governance. I know the board has a fiduciary and oversight responsibility.
- 7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have served on several board over the years.

8. Describe the specific knowledge and experience that you would bring to the board.

Medical

IEPs / 504 plans

Fundraising

Community Outreach

# School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

HCLA is a college prep school, leadership-themed school with a focus on character development, critical thinking and growth mindset.

2. What is your understanding of the school's proposed educational program?

I having a working knowledge of the school's proposed educational program.

3. What do you believe to be the characteristics of a successful school?

A successful school prepares students for today and the future.

4. How will you know that the school is succeeding (or not) in its mission?

The goals and objectives of the school's strategic plan, when evaluated, determine whether a school is successful.

## Governance

1. Describe the role that the board will play in the school's operation.

The board is primarily responsible for policy development, budget and general oversight.

2. How will you know if the school is successful at the end of the first year of operation?

We will know we are successful if we are on the blank, are fully enrolled, retain the majority of our staff, and have engaged and happy parents.

3. How will you know at the end of five years of the schools is successful?

Teacher and student retention are a major consideration. A strong fiscal operation, and a positive relationship in the community. Institutional and corporate partnerships that yield donors, internships, and other innovative opportunities to students, families and staff.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Program evaluation and working with OCS / NCDPI staff will be critical steps.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

I would formally address my concerns with the board.

\*Please include the following with your Information Form

• a *one page* resume

*If you responded within the application that disciplinary action has been taken against any past							
or present professional licenses, provide a detailed response below outlining the disciplinary							
action taken and the license validity. Click or tap here to enter text.							
Certification  I Jim Poole MD  certify to the best of my knowledge and							
I,, certify to the best of my knowledge and							
ability that the information I am providing to the North Carolina State Board of Education as a							
prospective board member for Heritage Collegiate Leader Chiarter School is true and correct							
in every respect.  Docusigned by:							
James M Porle, mo							
87241329124E43B							
Signature							
Signature Date							
Date							

Rouson 6A				Dwyer 6B			Wednesday			Friday			
Start Time	End Time	All Classes	Start Time	End Time	All Classes		Start Time	End Time	All Classes	Start Time	End Time	All Classes	
8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting/Clean Up	8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting/Clean Up		8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting/Clean Up	8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting/Clean Up	
8:20 AM	9:50 AM	Literacy Block - 6A	8:20 AM	9:50 AM	Math Block - 6B		8:20 AM	9:50 AM	Math Block - 6B/Literacy Block 6A	8:20 AM	9:50 AM	Math Block - 6B/Literacy Block 6A	
9:50 AM	10:35 AM	Nonfiction Studies: Social Studies- 6A	9:50 AM	10:35 AM	Nonfiction Studies: Science- 6B		9:50 AM	10:35 AM	Nonfiction Studies: Science- 6A/Social Studies 6B (DEBATE)	9:50 AM	10:35 AM	Nonfiction Studies: Science- 6A/Social Studies 6B (DEBATE)	
10:35 AM	10:50 AM	Recess	10:35 AN	10:50 AM	Recess		10:35 AM	10:50 AM	Recess	10:35 AM	10:50 AM	Eagle PRIDE Celebration 6A and 6B	
10:50 AM	11:05 AM	D.E.A.R.	10:50 AM	11:05 AM	D.E.A.R.		10:50 AM	11:05 AM	D.E.A.R.	10:50 AM	11:05 AM	Eagle PRIDE Celebration/Recess 6A and 6B	
11:05 AM	11:25 AM	Lunch/Bathroom	11:05 AN	11:25 AM	Lunch/Bathroom		11:05 AM	11:25 AM	Lunch/Bathroom	11:05 AM	11:25 AM	Lunch/Bathroom	
11:30 AM	1:00 PM	Literacy Block - 6B	11:30 AM	1:00 PM	Math Block - 6A		11:30 AM	1:00 PM	Math Block - 6A/Literacy Block 6B	11:30 AM	1:00 PM	Math Block - 6A/Literacy Block 6B	
1:00 PM	1:45 PM	Nonfiction Studies: Social Studies- 6B	1:00 PM	1:45 PM	Nonfiction Studies: Science- 6A		1:00 PM	1:45 PM	Nonfiction Studies: Science- 6B/Social Studies 6A	1:00 PM	1:45 PM	Nonfiction Studies: Science- 6B/Social Studies 6A	
1:45 PM	2:00 PM	Mindfulness/Go Noodle	1:45 PM	2:00 PM	Mindfulness/Go Noodle		1:45 PM	2:00 PM	Mindfulness/Go Noodle	1:45 PM	2:00 PM	Mindfulness/Go Noodle	
2:00 PM	2:45 PM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level PLC	2:00 PM	2:45 PM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level PLC		2:00 PM	2:45 PM	AVID	2:00 PM	2:45 PM	AVID	
2:45 PM	3:15 PM	AVID-Organization / Homework	2:45 PM	3:15 PM	AVID-Organization / Homework		2:50 AM	3:20 AM	AVID-Organization / Homework	2:50 PM	3:20 PM	AVID-Organization/Homework	
3:15 PM	3:30 PM	Bathroom/Clean Up	3:15 PM	3:30 PM	Bathroom/Clean Up		3:20 PM	3:30 PM	Bathroom/Clean Up	3:20 PM	3:30 PM	Bathroom/Clean Up	
3:30 PM		Dismissal	3:30 PM		Dismissal		3:30 PM		Dismissal	3:30 PM		Dismissal	

Hashitson



52 NORTH BUILDING 2 5200 GREENS DAIRY ROAD

**RALEIGH, NORTH CAROLINA 27616** 

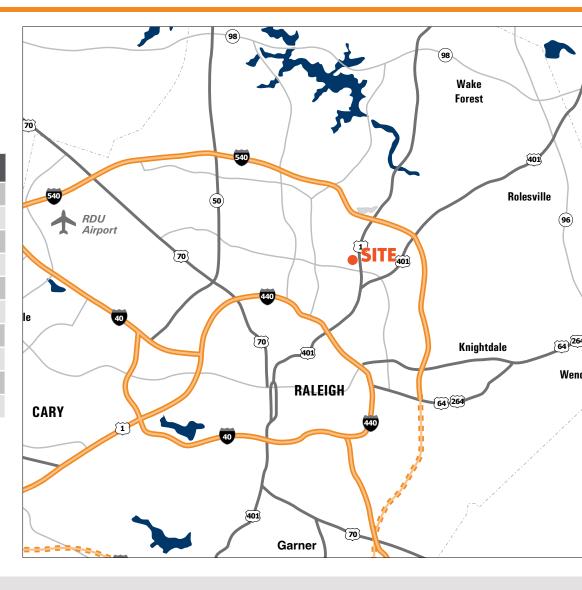
OFFICE/FLEX SPACE FOR LEASE ±19,516 SF



### **LOCATION & NEARBY AMENITIES**

- Single-tenant opportunity
- Ideal for flex/office combination user
- Building signage available

BUILDING STATS	
PROPERTY TYPE	Flex
LOCATION	5200 Greens Dairy Road, Raleigh, NC 27616
BUILDING SIZE	19,516 SF
FLOORS	One (1)
LEASING RATE	\$16.50 NNN
TICAM	\$3.50/SF
LOADING DOCKS	One 9' x 12' drive-in
CLEAR HEIGHT	24'
PARKING	4/1,000 SF
AVAILABLE SPACE	Suite 5200: 19,516 SF



### For more information, please contact:

**JORDAN BETZ** 

Senior Vice President (919) 830 5060 jordan.betz@foundrycommercial.com JOHN KELLY, SIOR

Market Leader (919) 987 1005 john.kelly@foundrycommercial.com

PATRICK BLACKLEY

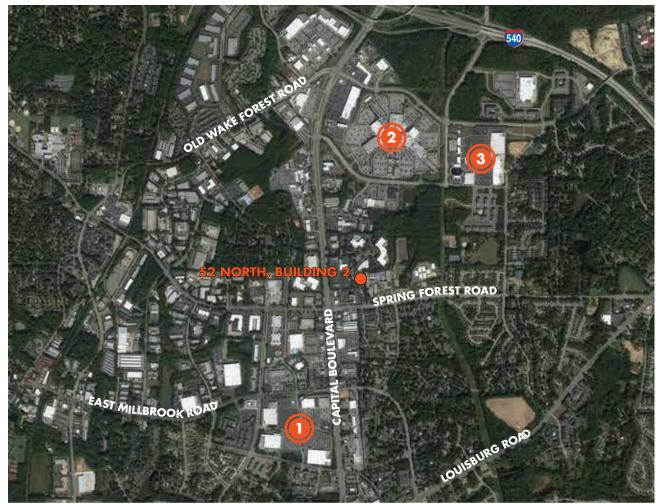
Senior Associate (919) 987 2912 patrick.blackley@foundrycommercial.com



2301 Sugar Bush Road, Suite 220 Raleigh, NC 27612

### 52 NORTH | BUILDING 2 SPACE FOR LEASE

### **NEARBY AMENITIES**





### **CAPITAL CROSSING**

1.5 MILES

Lowe's Home Improvement **PetSmart** Chick-fil-A Steak 'n Shake Staples Sam's Club



### TRIANGLE TOWN CENTER

3 MILES

Chili's Macy's Moe's Dillard's Starbucks Belk

Saks Fifth Avenue Subway Macaroni Grill Burger King Loft Arby's

Dick's Sporting Goods



### **POYNER PLACE**

3.5 MILES

CVS Applebee's Old Navy Target Five Below Starbucks

For more information, please contact:

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Market Leader (919) 987 1005 PATRICK BLACKLEY

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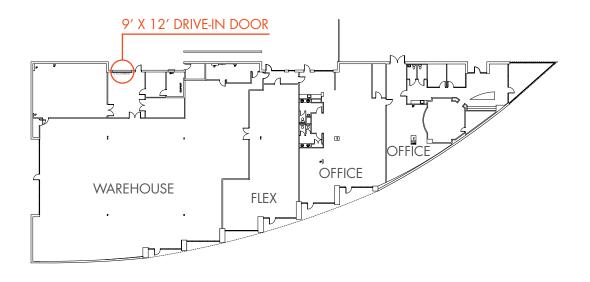


2301 Sugar Bush Road, Suite 220 Raleigh, NC 27612



### **BUILDING 2**

SUITE 5200 | ±19,516 SF





For more information, please contact:

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2301 Sugar Bush Road, Suite 220 Raleigh, NC 27612



52 NORTH BUILDING 4 5240 GREENS DAIRY ROAD

**RALEIGH, NORTH CAROLINA 27616** 

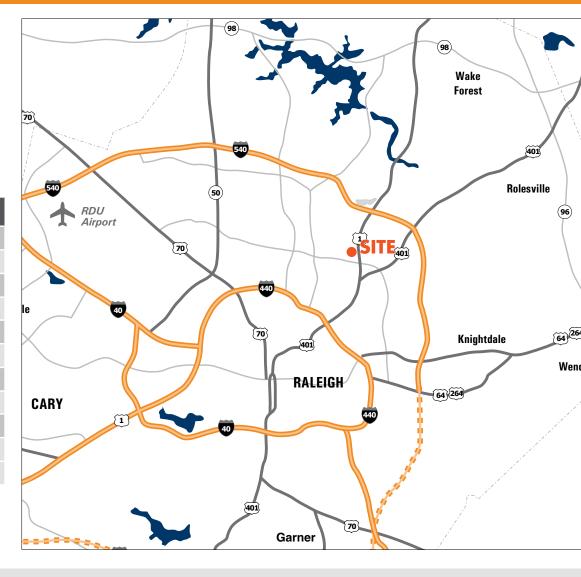
OFFICE/FLEX SPACE FOR LEASE ±15,278 - 32,921 SF

## 52 NORTH BUILDING 4 SPACE FOR LEASE

### **PROPERTY FEATURES**

- Attractive corporate campus setting
- Very efficient endcap space
- Ideal for large office/flex user
- Building signage available
- Surrounded by numerous amenity options

BUILDING STATS								
PROPERTY TYPE	Flex							
LOCATION	5240 Capital Boulevard, Raleigh, NC 27616							
BUILDING SIZE	91,877 SF							
FLOORS	One (1)							
LEASING RATE	\$16.50 NNN							
TICAM	\$3.27							
PARKING	4/1,000 SF							
LOADING DOCKS	9 dock-high doors							
CLEAR HEIGHT	14'							
AVAILABLE SPACE	Suite 5260: 32,921 SF							
	Can be subdivided to 15,278 & 17,643 SF							



### For more information, please contact:

**JORDAN BETZ** 

Senior Vice President (919) 830 5060 jordan.betz@foundrycommercial.com JOHN KELLY, SIOR

Market Leader (919) 987 1005 john.kelly@foundrycommercial.com PATRICK BLACKLEY

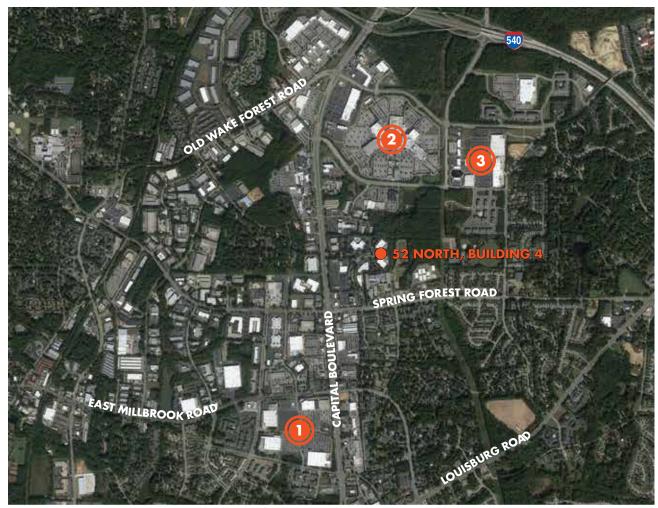
Senior Associate (919) 987 2912 patrick.blackley@foundrycommercial.com



2301 Sugar Bush Road, Suite 220 Raleigh, NC 27612

### 52 NORTH | BUILDING 4 SPACE FOR LEASE

### **NEARBY AMENITIES**





### **CAPITAL CROSSING**

1.5 MILES

Lowe's Home Improvement **PetSmart** Chick-fil-A Steak 'n Shake Staples Sam's Club



### TRIANGLE TOWN CENTER

3 MILES

Chili's Macy's Moe's Dillard's Starbucks Belk

Saks Fifth Avenue Subway Macaroni Grill Burger King Loft Arby's

Dick's Sporting Goods



### **POYNER PLACE**

3.5 MILES

CVS Applebee's Old Navy Target Five Below Starbucks

For more information, please contact:

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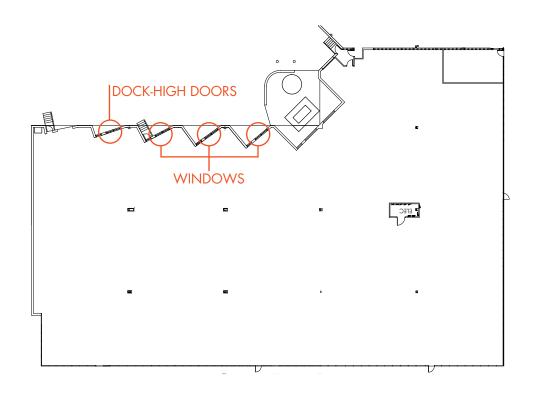


2301 Sugar Bush Road, Suite 220 Raleigh, NC 27612

## 52 NORTH | BUILDING 4 SPACE FOR LEASE

### **SUITE 5260**

±32,921 SF





### For more information, please contact:

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**JOHN KELLY, SIOR** 

Market Leader (919) 987 1005 PATRICK BLACKLEY

Senior Associate (919) 987 2912 john.kelly@foundrycommercial.com patrick.blackley@foundrycommercial.com



2301 Sugar Bush Road, Suite 220 Raleigh, NC 27612

-3A				Marsh - 3B	Friday			
Start Time	End Time	3A Classes	Start Time	End Time	3B Classes	Start Time	End Time	All Classes
8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting	8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting	8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting
8:20 AM	8:25 AM	Clean Up	8:20 AM	8:25 AM	Clean Up	8:20 AM	8:25 AM	Clean Up
8:25 AM	9:50 AM	Math Block - 3A	8:25 AM	9:55 AM	Literacy Block - 3B	8:25 AM	9:35 AM	Literacy 3B/Math 3A
9:55 AM	10:35 AM	Nonfiction Studies: Science - 3A	9:55 AM	10:35 AM	Nonfiction Studies: Social Studies- 3B	9:35 AM	10:45 AM	Literacy 3A/Math 3B
10:40 AM	11:20 AM	Nonfiction Studies: Science - 3B	10:40 AM	11:20 AM	Nonfiction Studies: Social Studies- 3A	10:50 AM	11:20 AM	Eagle Pride Celebration/Recess
11:25	11:40 AM	Mindfulness/Go Noodle	11:25 AM	11:40 AM	Mindfulness/Go Noodle	11:25 AM	11:40 AM	Mindfulness/Go Noodle (Homeroom Teache
11:40 AM	12:25 PM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level PLC	11:40	12:25 PM	Art/PE/Technology Time (Hathaway/White/Mitchell)	11:40 AM	12:25 PM	Art/PE/Technology Time (Hathaway/White/Mitchell)
12:30 PM	1:00 PM	Lunch/Bathroom	12:30 PM	1:00 PM	Lunch/Bathroom	12:30 PM	1:00 PM	Lunch/Bathroom
1:00 AM	1:20 PM	Bathroom/Recess	1::00 AM	1:20 PM	Bathroom/Recess	1:00 PM	2:00 PM	Nonfiction Studies: Science- 3A/3B
1:20 PM	1:35 PM	DEAR	1:20 PM	1:35 PM	DEAR	2:00 PM	3:00 PM	Nonfiction Studies: Science- 3B/3A
1:35 PM	3:00 PM	Math Block - 3B	1:35 PM	3:00 PM	Literacy Block - 3A	3:00 PM	3:20 PM	AVID-Organization / Homework
3:00 PM	3:20 PM	AVID-Organization / Homework	3:00 AM	3:20 PM	AVID-Organization / Homework	3:20 PM	3:30 PM	Bathroom/Clean Up
3:20 PM	3:30 PM	Bathroom/Clean Up	3:20 PM	3:30 PM	Bathroom/Clean Up	3:30 PM		Dismissal Begins
3:30 AM		Dismissal	3:30 PM		Dismissal			

Bond						Bradford	Friday			
Start Time	End Time	4A		Start Time	End Time	4B	Start Time	End Time	All Classes	
8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting		8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting	8:00 AM	8:20 AM	Breakfast/Homeroom/Morning Meeting/Clean Up	
8:20 AM	8:25 AM	Clean Up		8:20 AM	8:25 AM	Clean Up	8:20 AM	8:25 AM	Clean Up	
8:25 AM	9:10 AM	Nonfiction Studies: Social Studies- 4A		8:25 AM	9:10 AM	Nonfiction Studies: Science - 4B	8:25 AM	9:25 AM	Literacy-4A/Math- 4B Block	
9:10 AM	9:25 AM	D.E.A.R.		9:10 AM	9:25 AM	D.E.A.R.				
9:30 AM	9:45 AM	Mindfulness/Go Noodle		9:30 AM	9:45 AM	Mindfulness/Go Noodle	9:30 AM	9:45 AM	Mindfulness/Go Noodle	
9:45 AM	10:30 AM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level PLC		9:45 AM	10:30 AM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level PLC	9:45 AM	10:30 AM	Art/PE/Technology Time (Hathaway/White/Mitchell) Grade Level PLC	
10:35 AM	12:05 PM	Literacy Block - 4A		10:35 AM	12:05 PM	Math Block - 4B	10:35 AM	11:05 AM	Eagle Pride Celebration/Recess	
12:05 PM	12:25 PM	Lunch/Bathroom		12:05 PM	12:25 PM	Lunch/Bathroom	11:10 AM	11:30 AM	Bathroom/Recess	
12:25 PM	12:45 PM	Bathroom/Recess		12:25 PM	12:45 PM	Bathroom/Recess	11:35 AM	12:05 PM	Literacy-4B/Math- 4A Block	
12:50 PM	2:20 PM	Literacy Block 4B		12:50 PM	2:20 PM	Math Block 4A	12:05 PM	12:25 PM	Lunch	
2:20 PM	3:05 PM	Nonfiction Studies: Social Studies- 4B		2:20 PM	3:05 PM	Nonfiction Studies: Science- 4A	12:30 PM	1:00 PM	Literacy-4B/Math- 4A Block Cont.	
3:05 PM	3:25 PM	AVID-Organization / Homework		3:05 PM	3:25 PM	AVID-Organization / Homework	1:05 PM	2:00 PM	Nonfiction Studies: Science- 4A/4B	
3:25 PM	3:30 PM	Bathroom/Clean Up		3:25 PM	3:30 PM	Bathroom/Clean Up	2:05 PM	3:00 PM	Nonfiction Studies: Social Studies- 4B/4A	
3:30 PM		Dismissal		3:30 PM		Dismissal	3:05 PM	3:25 PM	AVID-Organization / Homework	
							3:25 PM	3:30 PM	Bathroom/Clean Up	
							3:30 PM		Dismissal	